

Timothy Paschall - Possible Coaching Opportunity from weekly update

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To: Donald Green <dgreen@Fivelakeslawgroup.com>

Good afternoon! This concern has been investigated and a potential coaching opportunity has been identified.

Attorney Feedback Executive Summary

Client experience

BRP-545676 - Timothy Paschall - Attorney did not transfer client correctly. The client could hear the client service agent asking for details from the attorney rather than being on a hold while the transfer completed

This call has been reviewed. During the transfer, the retention agent asked Tim why the client wanted to cancel and Tim replied, "I am unsure, but she is here on the line with us," so it seems as if he knew the client could hear what he was saying to the retention agent. The correct process involves placing the client on hold before connecting with the agent so that the client does not hear what is discussed prior to being connected with the retention agent.

Please connect with Tim to make sure he understands the process for transferring a client to retention.

**Best Regards,
Roxie**

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