

From: [Matt Barnes](#)
To: [Donald Green](#)
Subject: RE: Emily Bonds - Potential Coaching Opportunity?
Date: Friday, February 23, 2024 9:24:27 AM
Attachments: [masonRF.png](#)

I just read through it more closely. It's bonkers.

Matt Barnes
Attorney Manager
(Admitted in Virginia)



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From: Donald Green <dgreen@FiveLakesLawGroup.com>
Sent: Friday, February 23, 2024 8:28 AM
To: Matt Barnes <mbarnes@FiveLakesLawGroup.com>
Subject: Re: Emily Bonds - Potential Coaching Opportunity?

Thanks. I'm what award of this. Roxane needs to stop inundating us with trivial info I

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From: Matt Barnes <mbarnes@FiveLakesLawGroup.com>
Sent: Friday, February 23, 2024 8:17:12 AM
To: Donald Green <dgreen@FiveLakesLawGroup.com>
Subject: FW: Emily Bonds - Potential Coaching Opportunity?

Happy Friday.

I think this was erroneously sent to me, since Emily is on your team.

Matt Barnes
Attorney Manager
(Admitted in Virginia)



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From: Roxanne Bell <rbell@FiveLakesLawGroup.com>
Sent: Thursday, February 22, 2024 3:37 PM
To: Matt Barnes <mbarnes@FiveLakesLawGroup.com>
Subject: Emily Bonds - Potential Coaching Opportunity?

Hey, Matt!

Emily had a consultation near the end of January during which the client said they weren't available to complete the consultation at the scheduled time and asked if they could be rescheduled. Emily said yes, but then she selected Positive Consultation as the Sharpen disposition. She also marked the consultation as Complete in Salesforce on 2/12, but there is no record of her talking to the client on 2/12. Then, today, the call was rescheduled, but Emily said it didn't show up on her calendar and she marked it as reschedule. Her notes indicate she was double booked.

I am not sure what's going on. By the time Teresa mentioned this to me, there was no record of Emily being double-booked in Sharpen or Acuity, so I couldn't investigate that part of the issue.

Can you connect with her to see what's going on?

The correct process would have been for her to select "Incomplete Consultation" for the Sharpen disposition when she was not able to complete the consultation in January.

I also do not know why she marked the consult complete on 2/12, because there is no record of an appointment that day and no call for the client in Sharpen either.

Call marked Positive Consult: <https://app.r1-sharpen.com/contactcard/14752926>

Date range: 2024-01-22 15:15:00 - 2024-02-22 15:16:00

Start Time	End Time	Queue Name	Communication Type	Reason for Hangup	Source Number	Queue Call Manager ID	Hold Time	Talk Time	End Type
2024-01-26 09:15:16	2024-01-26 09:16:25	F-Emily Bonds	phoneCall	HANGUP-AGENT	+140446666470	14752928	00:00:04	00:01:05	Positive Consult
2024-01-29 12:01:04	2024-01-29 12:01:43	F-Emily Bonds	phoneCall	HANGUP-AGENT	+140446666470	14800676	00:00:03	00:00:36	No Answer
2024-01-29 12:01:52	2024-01-29 12:02:53	F-Emily Bonds	phoneCall	HANGUP-AGENT	+140446666470	14800750	00:00:03	00:00:58	Left Voicemail

Displaying 3 records

Tradelines Transactions Credit Reports Files Settlement Offers Notes Program Loans Ledger **Program Events** Cases

Program Events (10)

10 Items • Sorted by Created Date • Updated a few seconds ago

<input type="checkbox"/>	Program Event Name	Type	Sub Type	Channel	Created By	Created Date	
1	PE-54833563	Attorney Action	Consultation Call Reschedule		Roxanne Bell (Five Lakes)	2/22/2024, 3:26 PM	▼
2	PE-54833526	Attorney Action	Consultation Call Undo		Roxanne Bell (Five Lakes)	2/22/2024, 3:26 PM	▼
3	PE-54833524	Attorney Action	Consultation Call Complete		Roxanne Bell (Five Lakes)	2/22/2024, 3:26 PM	▼
4	PE-5480073	Attorney Action	Consultation Call Reschedule		Emily Bonds (Five Lakes)	2/22/2024, 2:02 PM	▼
5	PE-5257784	Attorney Action	Consultation Call Complete		Emily Bonds (Five Lakes)	2/12/2024, 2:28 PM	▼
6	PE-4871079	Attorney Action	Consultation Call Reschedule		Emily Bonds (Five Lakes)	1/29/2024, 12:02 PM	▼
7	PE-4840031				BeeHive - Vanessa Paraguison	1/26/2024, 1:13 PM	▼
8	PE-4839086	Attorney Action	Monthly Program Review		Emily Bonds (Five Lakes)	1/26/2024, 12:23 PM	▼
9	PE-4831818	Attorney Action	Consultation Call Reschedule		Emily Bonds (Five Lakes)	1/26/2024, 9:16 AM	▼
10	PE-4828697				Beehive - Ana Competente (Fiv...	1/25/2024, 9:13 PM	▼

Best Regards,

Rox

Roxanne Bell, Operations Manager
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