

From: [Roxanne Bell](#)  
To: [Donald Green](#)  
Subject: Nakeyah Martin - Possible Coaching Opportunity from weekly update  
Date: Monday, February 26, 2024 11:41:01 AM  
Attachments: [jmaoe001.png](#)

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

**Attorney Feedback Executive Summary**

**Client experience**

**BRP-552914, Nakeyah Martin - The Attorney did not follow the correct process for transferring a client. The client was cold transferred, not warm transferred. Additionally, the client simply wanted to remove a tradeline from their program, warm transfers should be reserved for termination requests only.**

The call was reviewed. Nakeyah did cold transfer the client to retention after they expressed that they wanted to remove their Bank of America tradeline.

The retention line is not to be used for administrative or customer service issues. The correct process when a client wants to remove a tradeline is for the attorney to open an Attorney Request Case with a Request Type of "Remove Tradeline" and then add a note providing details on the specific account/action to be taken.

When a client is escalated to retention for appropriate reasons, the correct transfer process includes placing the client on hold while the attorney does a warm transfer to the retention agent and provides the agent with information about the program and the client's concerns before connecting the client to the agent.

Please connect with Nakeyah to ensure she understands when to use the retention line and when to open a case as well as the appropriate process for each. Thanks!

New Case

\*CaseType

--None--

\*Related Contacts

--None--

\*Request Type

--None--

--None--

Add Tradeline

Remove Tradeline

Address Client Concerns

Consultation Call Scheduling Issues

Send Client Customer Service Contact Information

Enrollment Agreement Issues

Offer Review Issue

Termination

Other

*Best Regards,*

*Roxie*

Roxanne Bell, Operations Manager  
2844 Livernois Rd., P.O. Box 5802, Troy, MI 48099  
[rbell@fivelakeslawgroup.com](mailto:rbell@fivelakeslawgroup.com) | Office: 248-809-5239