**From:** Matt Barnes <[mbarnes@Fivelakeslawgroup.com](mailto:mbarnes@Fivelakeslawgroup.com)>  
**Sent:** Friday, February 23, 2024 8:17:12 AM  
**To:** Donald Green <[dgreen@Fivelakeslawgroup.com](mailto: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)**

A close up of a logo

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**From:** Roxanne Bell <[rbell@Fivelakeslawgroup.com](mailto:rbell@Fivelakeslawgroup.com)>   
**Sent:** Thursday, February 22, 2024 3:37 PM  
**To:** Matt Barnes <[mbarnes@Fivelakeslawgroup.com](mailto: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.iz1.sharpen.cx/contactCard/14752928>

A screenshot of a computer

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A screenshot of a computer

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**Best Regards,**

**Roxie**

**Roxanne Bell, Operations Manager**

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