

NARRATIVE REPORT

During the period of February 8 to May 10, I had the privilege to undergo my on the job training (OJT) in the sales office of St. Peter Life Plan Tacloban North Branch located of Gaisano Capital Real 2nd floor. This experience provided me with valuable insights into the dynamics of sales operations and enhanced my understanding of customer relationship management.

I was entrusted with a range of responsibilities that provided me with a comprehensive understanding of sales operations. My tasks included LPA scanning and transmitting check vouchers, ensuring accuracy and efficiency in financial transactions. Engaging in field sales and marketing activities, including mass presentations, honed my skills in effectively communicating product features and benefits to potential clients. Additionally, I assisted customers with GCash registry, facilitating seamless transactions and enhancing client satisfaction. Handling communication for check distribution and payment reminders further refined my organizational and interpersonal skills. Moreover, I was involved in the meticulous process of releasing certificates of full payment and checks, ensuring timely and accurate delivery to clients. Furthermore, participating in event preparations enabled me to appreciate the meticulous planning and attention to detail required for successful sales events. Overall, my OJT experience at St. Peter Life Plan Tacloban North Branch was invaluable, providing me with practical insights and skills essential for a successful career in sales and customer service.

During my time at St. Peter life plan Tacloban North Branch, I had the extraordinary opportunity to meet the CEO of the company sir Jonathan B. Vitangcol the President and CEO SPLPI, Sir Artemio B. Vitangcol III the president and CEO- Chapels, Sir Francis Myl A. Bautista the president and CEO- Casket Corporation and Ma'am Mel Emmie Bautista-Salao the Assistant Vice President- Chapel Operation, an experience that left an indelible mark on my professional journey. Meeting the CEO's provided me with invaluable insights into the vision and strategic direction of the organization. It was a rare occasion to interact with someone who embodies leadership and excellence, and I was deeply inspired by their dedication, passion and commitment to driving the company forward. Interacting with the CEO was a profound and memorable experience for me as an intern student that furthered my determination to pursue excellence in my career and make a meaningful impact in the world of sales and customer service. Moreover,

bonding with our managers, supervisors, staff and sales agents during the outing strengthened our professional relationships and fostered a sense of unity and shared purpose within the team.

In conclusion, my OJT experience at St. Peter life plan Tacloban North branch was truly invaluable, offering me practical insights and invaluable skills that are essential for successful career in sales and customer service. It was a transformative journey that not only deepened my understanding of sales operations but also enriched my personal and professional growth, laying a solid foundation for my future endeavors in the field.

Prepared by:

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STUDENT INTERNSHIP PROGRAM
BS MARKETING
A.Y. 2023-2024

LEARNING JOURNAL FOR THE MONTH OF FEBRUARY

Name of Student Intern: **FRTZIE ANN C. TONDO**

Host Training Establishment: **ST. PETER LIFE PLAN TACLOBAN NORTH BRANCH**

PERIOD	TASKS ACCOMPLISHED	SKILLS & COMPETENCIES LEARNED	REFLECTION
FEBRUARY 8 - 14	<ul style="list-style-type: none">• Orientation and Team Introduction• LPA scanning• Communication with Plan Holders	Understanding team work. Proficiency in data analysis and attention to details. Effective interpersonal and customer service skills.	As the week ends, I reflect on my tasks at St. Peter Life Plan: team integration, data analysis, and client engagement. These emphasize our commitment to excellence and client satisfaction. I'm eager to use these insights to contribute to our goals and uphold St. Peter's legacy of service and reliability.
FEB 14 - 20	<ul style="list-style-type: none">• Attended sales training on business insurance and life plans.• Initiated discussions with prospects to introduce them to St. Peter's offerings.	In-depth knowledge of business insurance and life plans. Teamwork Effective communication	I gained valuable insights into sales techniques and client engagement. These experiences enhanced my knowledge and teamwork skills, preparing me to better serve our clients and contribute to our sales goals.
FEB 21-27	<ul style="list-style-type: none">• Transmittal of check voucher	Accuracy	I improved my skills in accuracy of the details of the documents and communication skills. These

	<ul style="list-style-type: none"> Organizing OR <p>Communication for check distribution /releasing and payment due reminders</p>	<p>Document management</p> <p>Clear communication and follow ups.</p>	<p>enhance my ability to financial process and contributing to smoother operations.</p>
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LEARNING JOURNAL FOR THE MONTH OF MARCH

Name of Student Intern: **FRITZIE ANN C. TONDO**

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PERIOD	TASKS ACCOMPLISHED	SKILLS & COMPETENCIES LEARNED	REFLECTION
Feb 28 to March 5	LPA Scanning (2022-2024) Transmittal of weekly reports	Data analysis and attention to details. Report preparation and accuracy.	This week, I improved my data analysis and reporting skills. These tasks have enhanced my precision and efficiency in handling important information.
March 6 to 12	Customer assistance in gcash registry Communication with the client for check distribution, releasing of COFP and payment due reminders	Technical support and customer service. Effective communication and follow up.	I enhanced my technical support and communication skills. These experiences improved my ability to assist clients and manage financial processes efficiently
March 13 to 19	Assist the client Call and message the plan holder regarding their check for release Releasing of check	Customer service and problem-solving. Communication Financial handling and accuracy.	This week, I enhanced my customer service, communication, and financial handling skills. These tasks improved my ability to assist clients effectively and manage financial transactions accurately.

March 20 to 27	<ul style="list-style-type: none"> • Write the daily collection remittance. • Release the certificate of full payment. • Assist clients with their payout channel, whether it's a bank account or GCash. 	<p>Attention to details</p> <p>Time Management</p> <p>Customer service</p>	<p>Completing these tasks has significantly enhanced my organizational and financial management skills. The necessity to maintain accurate records and process payments efficiently has sharpened my attention to detail and time management. Assisting clients with their payout channels has improved my customer service abilities, ensuring I can address their concerns and provide clear, helpful guidance. These experiences have collectively strengthened my competency in financial operations and client relations.</p>
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LEARNING JOURNAL FOR THE MONTH OF APRIL

Name of Student Intern: **FRITZIE ANN C. TONDO**

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PERIOD	TASKS ACCOMPLISHED	SKILLS & COMPETENCIES LEARNED	REFLECTION
APRIL 1-6	<ul style="list-style-type: none">Assist the clientOrganize the LPA and ID'sCall and text the plan holders regarding of releasing their checks.	Customer service Maintaining order and accuracy by organizing LPAs and IDs. Communication	These tasks provided me with a well-rounded set of skills that are crucial in both client-facing and administrative roles. The experience highlighted the importance of balancing empathy with efficiency, communication with accuracy, and proactivity with patience. I am confident that these skills will serve me well in future professional endeavors, enabling me to handle complex tasks and interact with clients effectively.
APRIL 8 to 13	<ul style="list-style-type: none">Releasing of Certificate of full payment.Assist the Client regarding with the payout channel bank account or Gcash.	Clear and concise communication with clients regarding the release of the certificate of full payment. Identifying and resolving issues related to payout channels, ensuring clients receive their payments smoothly.	Working on releasing certificates of full payment and assisting clients with their payout channels has been a valuable learning experience. I have honed my communication and customer service skills, learning to convey information clearly and address client concerns promptly. Gaining technical knowledge of payout channels like bank accounts and Gcash has enabled me to assist clients more effectively, ensuring smooth and accurate payment processes.

APRIL 15 To 20	<ul style="list-style-type: none"> • Assist with the customer • Scanned the ROP • Release certificate of full payment • Checked the LPA records for the 2022-2024 • Meeting with the CEO and President of St. Peter Life plan. • Summer outing 	<p>Customer service</p> <p>Technical Proficiency</p> <p>Attention to details</p>	<p>Assisting customers has strengthened my communication and problem-solving skills.</p> <p>These tasks have improved my efficiency and effectiveness in handling financial processes and customer interactions.</p>
April 22 to 27	<ul style="list-style-type: none"> • Assist the customer • Scanned LPA for the month of January, February and march 	<p>Assisting customers with inquiries and resolving their issues effectively.</p> <p>Ensuring accuracy and thoroughness in handling and reviewing documents.</p>	<p>Assisting customers has enhanced my communication and problem-solving abilities. Scanning LPA documents for multiple months has improved my technical skills and attention to detail. These tasks have made me more efficient and effective in managing documents and addressing customer needs.</p>
Apri 29- May 4	<ul style="list-style-type: none"> • Assist the customer • Text and calls the plan holder regarding with their due dates. • Releasing to the sales agent the certificate of full payment 	<p>Assisting customers and effectively handling their inquiries and concerns.</p> <p>Providing clear and concise information to customers.</p> <p>Balancing customer interactions with administrative tasks efficiently.</p>	<p>Assisting customers and communicating with plan holders about due dates has strengthened my customer service and communication skills. Releasing certificates of full payment has enhanced my technical proficiency and attention to detail. Balancing these tasks has improved my time management skills, making me more efficient and effective in my role.</p>

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LEARNING JOURNAL FOR THE MONTH OF MAY

Name of Student Intern: **FRITZIE ANN C. TONDO**

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PERIOD	TASKS ACCOMPLISHED	SKILLS & COMPETENCIES LEARNED	REFLECTION
May 6 to 10	<ul style="list-style-type: none">• Orientation at DSWD/Mas presentation/Sales, marketing• Do sales/marketing at DSWD	<p>Promoting products or services during the DSWD sales/marketing activities.</p> <p>Developing and implementing marketing strategies to attract potential clients.</p>	<p>The orientation at DSWD and sales/marketing activities have enhanced my public speaking and presentation skills, boosting my confidence. These tasks taught me effective product promotion and client attraction strategies, improving my interpersonal skills and understanding of client needs.</p>

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JOURNAL OF ISSUES AND CONCERNS ENCOUNTERED DURING THE SIPP

Name of Student Intern: **FRITZIE ANN C. TONDO**

Host Training Establishment: **ST. PETER LIFE PLAN TACLOBAN NORTH BRANCH**

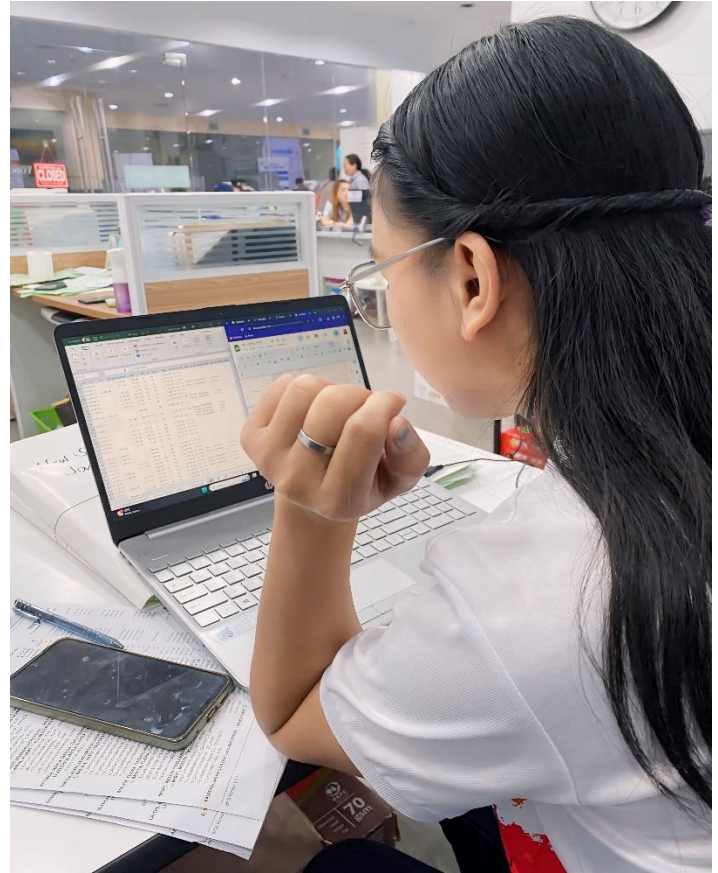
PERIOD	ISSUES & CONCERNS MET	SOLUTIONS UNDERTAKEN	REFLECTION
March	The conflict arose between the plan holder and sales agent/ collector, leads to a misunderstanding about the payment and the issuance of receipts.	<p>The manager explained the receipt issuance process to the client, the manager clarified the role of the collector and the expectations for both parties. This explanation helped the client understand the procedure and ensured that payments were correctly recorded.</p> <p>The manager decided to stop collecting instead let the plan holder visit the office to pay, it ensures that the client receives a receipt promptly and directly, eliminating the risk of miscommunication or lost of receipts.</p>	<p>Reflecting on the situation, I've learned the, importance of clear communication, especially when it comes to payment process and issuance of receipts. Its crucial to ensure clients understand how payments are handled to avoid misunderstanding.</p> <p>The decision to have plan holders visit the office to pay directly is a proactive solution to ensure receipts issuance is prompt and eliminates any potential miscommunication or loss of receipts. Moving forward, I'll continue to prioritize transparent</p>

			communication to prevent similar issues from arising in the future
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This photograph on the right side was taken while I was inputting the names of the plan holders who already received their check for the company digital copies.



This picture on the left side was taken during my assignment in which I was tasked to file the daily remittance report that will be sent to send to the main office of the company through LCB.