Date: September 14, 2023

To: Sales Team

From: Angela Monette T. Natividad
         VP-Operations

Re: Validate Client Contact Number

CC: Audit, MIS and Mktg

Greetings!

To make it easier for our ECs and SICs to determine all written information in the client ledger is correct. Starting September 25, 2023, ECs are advised to do the following:

- EC will assist the client in filling out the client ledger.
- EC will check the ledger and validate the client's contact number by calling the phone number.
- EC will send a thank you text message to the client after the transaction.
- For old clients, EC will verify the client by calling the phone number and talking to the client.
- EC will encode the updated contact number in the system.

For your information and guidance. Thank you