

If a client or prospect calls and has a personal lines question and/or concern, please hot-transfer them to our personal lines department. Never make them hang up and call the PLD directly.

Your transfer comes with a full disclosure/hort explanation and expectation(s) that they should be receiving after you've transferred their call.

Part of your conversation needs to include: Our personal lines department is located in Hollister and is staffed by 4 personal lines experts, and at times when there are high volumes of calls, lunchtimes, that you might get voice-mail when/after you transfer them. Please advise them to **always leave a detailed message** including the purpose of the call, with their name and best way to contact them. (phone number, e-mail, etc. and then to leave info within their v/m message).

Let them know that they will receive a returned call the same day or if they leave a message at the end of the day or after business hours, then they will get a returned call the next day.

Also please let them know at the end of your call, that if they do not hear back that same day/next day, to PLEASE let us know.

Please do not ever ask someone to hang up if they call us, and then have them call the personal lines number themselves.

In case you're wondering, everyone is receiving this email because I received 3 personal lines related complaints while I was on vacation this week. The complaints are as follows:

- A person was told by someone in our office that we don't do that here, and to hang up and call the PLD.
- A person called the PLD 2 times, the phone was never picked up, the calls just went to VM, during our business ours, they were frustrated and hung up without leaving messages.
- A person called the PLD and left a message to add a new vehicle, and never received a returned call same day or next day. They were worried they couldn't drive their new vehicle because they never confirmed/connected with our PLD. They called again and got VM.

Of course, going the extra mile for our clients is always appreciated by me, which would be to send a follow up email to the PLD to make sure that they took care of the client that called and needed to insure their new _____. Or had a billing question, or whatever their concern was at the time that you transferred the call to their office.

Please remember that most of our personal lines clients are also connected to our business clients and we MUST make sure that they are getting the level of services that they are expected to receive.

If you have any questions or if you need clarification about our Personal Lines Department where we have 4 people staffed, plus an outside manager, please let me know.

-Shawn