

Customer Processing Instructions

Our process in a nutshell:

Contact the customer

Mail FRA

Ensure FRA gets signed and returned

Notify the customer of Acceptance

Process Outline:

Assist customer in reserving their system if possible.

Verify new customer by typing in their zipcode.

If the zipcode is not known, contact the new customer and build rapport. Answer their questions or get their questions so you can get answers for them.

Once the zipcode is entered, print out their FRA.

Prepare the Application Package.

Edit the comment box in the customer's record in your back office to indicate notes from the conversation, the date the FRA is sent, etc.

Make a note to call back in 3 business days.

3rd business day call customer and ask if the FRA has been received.

If not, call back in 2 days.

If still not, call back in 2 more days.

If after 7 days the FRAs have not been received, call the customer and tell them you will mail another set of FRAs and for them to disregard one if they get both. Mail a new set of FRAs.

When FRA has been received, ask them to open the pkg, sign and mail the copies. Suggest that they print a copy of the General Terms & Conditions (GT&C) document for their records as well.

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Make a note to contact the customer in 5 days if you have not received your copy of their FRA. If Associate copy has not been received after 5 days, call to confirm it was mailed.

Once Assoc. copy is received, check your back office for Application Acceptance. If not received within 2 business days, write a support ticket requesting the status of the application.

If the company has not received their copy of the FRA, wait 3 business days then contact the customer to verify that the corporate copy was mailed. If necessary, print and mail a new copy to the customer.

When the Application Acceptance is indicated in your back office, call the customer and inform them that their application has been accepted. Suggest that they print the Letter of Acceptance and file it with their FRA and GT&C documents for use when the engineer designs their system.

This system is offered to handle large numbers of customers being processed at the same time with all of them at different stages in the process. The intention is to be able to perform the specific tasks associated with each input or event individually as stand alone activities.

A “tickler” file is used to maintain reminders throughout the process. I use the Leads function in the Associates area (back office). I enter the customer’s name as a new lead and type the next action in the comment box. I set the calendar-clock to indicate when it’s time to perform the next action. The full date and time must be entered in order for the reminder function to work. The date-time stamp in your leads list changes to red when the “timer” has expired and it’s time to perform the next action.

Use the “next action” you entered in the comment box with the Input List below to determine the steps to be taken.

I add comments to the comment box in their customer record indicating each action taken. This step is not included in the list below as it is done as part of each action. With a large number of customers being processed, it is critical to know at all times where each customer is in the process. Updating the comment box in their customer record is the easiest way to do this. If you think this is too time consuming, try not doing it and see what happens when you have more than a hand-full of customers.

To use this system, look for the **Input** that corresponds to what is happening for the customer at this time. For example, if you have sent the FRA to the customer and created a “note” to remind yourself to contact them after 3 days, on the 3rd day your reminder will be activated and you would perform the task specified for **Input 3**.

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Process broken down into next action steps

Input 1: New Customer notification in the Messages area of your back office

Input 2: Customer welcomed and zipcode known

Input 3: 3 day reminder to confirm the customer received the Application Package

Input 4: Customer has received the Application Package

Input 5: Customer has not received the Application Package after 3 days

Input 6: 2 day reminder to confirm receipt of Application Package after 5 days

Input 7: Customer has not received the Application Package after 5 days

Input 8: Second 2 day reminder to confirm receipt of Application Package after 7 days

Input 9: Customer has not received the Application Package after 7 days

Input 10: 5 day reminder to confirm that customer mailed back the FRA

Input 11: Associate copy of FRA received from the customer

----- **The remaining steps ARE NOT to be performed until further notice** *-----

Input 12: Application Acceptance not indicated in the Messages Area of the back office within 2 days of receiving Associate copy of FRA

Input 13: Support ticket response indicates that the corporate copy of the FRA has not been received.

Input 14: Application Acceptance indicated in back office

* The corporate office is not currently processing FRAs. This document will be updated and distributed when this changes.

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Input 1: New Customer notification in the Messages area of your back office.

Task: Call customer to welcome them. Build rapport. Answer questions or get questions and get back to them with answers. Take notes. Get their zip code if you don't already know it.

Input 2: Customer welcomed and zipcode known.

Task: Verify customer and mail Application Package with FRA.

1. Type their zipcode in the box at the top of their customer record where it says "Verify."
 2. Scroll down and click on their house number link to access their FRA.
 3. Print their FRA and prepare Application Package as per instructions in Completing the Sale document.
 4. Mail the Application Package.
 5. Add customer to your Leads in the Associate area with the next action and date of next action. Next action is to confirm receipt of the Application Package in 3 days.
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Input 3: 3 day reminder to confirm customer received the Application Package

Task: Call customer to confirm Application Package received.

Input 4: Customer has received the Application Package

Task: Encourage customer to process the paperwork.

1. Encourage them to sign and mail the two copies and file their copy.
 2. Encourage them to print the FRA Terms & Conditions and file it with their copy. Have them login to their customer account, click on Houses in the menu and scroll down.
 3. Update next action and date. Next action is contact them again in 5 days if you have not received your copy of the FRA back from them.
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Input 5: Customer has not received the Application Package after 3 days

Task: Update next action and date. Next action is contact them again in 2 days

Input 6: 2 day reminder to confirm receipt of the Application Package after 5 days

Task: Call again to verify that they have received the Application Package

Input 7: Customer has not received the Application Package after 5 days

Task: Update next action and date. Next action is contact them again in 2 days

Input 8: Second 2 day reminder to confirm receipt of the Application Package after 7 days

Task: Call again to verify that they have received the Application Package

Input 9: Customer has not received AP after 7 days

Task: Notify customer that you are sending a new Application Package

1. Tell customer you will mail them a new Application Package and to disregard one if they receive both
 2. Print and mail a new Application Package to the customer.
 3. Update next action and date. Next action is contact them again in 2 days
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Input 10: 5 day reminder to confirm that the customer mailed back the FRA

Task: Call again to verify that the customer has mailed the FRAs

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Input 11: Associate copy of FRA received from the customer

Task: Update next action and date. Next action is check back office for Application Acceptance in 2 days (enter June for now just to put in a date so you can check back later when the corporate office is processing FRAs). Leave the customer in Leads until they are notified of their Letter of Acceptance.

Input 12: Application Acceptance not indicated in the Messages Area of the back office within 2 days of receiving Associate copy of FRA

Task: Write a support ticket requesting the status of the application

Input 13: Support ticket response indicates that the corporate copy of the FRA has not been received.

Task: Wait 3 days before contacting customer to verify that it was mailed.

1. Update next action and date. Next action is contact them again in 3 days to verify that the corporate copy of the FRA was mailed.

2. Mail new copy if necessary

Input 14: Application Acceptance indicated in your back office

Task: Inform customer of acceptance

1. Call customer and inform them that their application has been accepted.

2. Suggest that they print a copy of their Letter of Acceptance and file it with their FRA and FGT&C documents for use when the engineer designs their system.

3. Instruct them how to print their Letter of Acceptance by logging into their customer account, clicking on Houses in the menu to the left, and scrolling down to the bottom. They can click on the blue link to access and print their Letter of Acceptance.
