

Client Servicing

Procedure/Function	Where Accomplished	How Accomplished
Track the time spent to resolve client issues	Notes and Reports	Use the Timer functions in Notes to keep track of the time spent to resolve the issue specified in the note. Then use the Total Contact Time Report by Client to show the client the amount of time devoted each month to resolving the client's employee's issues.
Send Birthday Cards	Label Manager	Create a Birthday card or address label in the Label Manager and each month print birthday postcards or print labels and apply to birthday cards to send to clients.
Manage Policy Renewals	Job Manager	Create a Job with all the tasks required to a policy such as a group health policy. (Send letter requesting current census, shop the census for current rates, prepare proposal for the client, make appointment to discuss the proposal with the client).