Remote Service Team Member Sample Daily Schedule

TODAYAPP

Time	Activity	TodayApp Function	Tech Used	Why do this?
8:20-8:30	Starting Ritual	n/a	n/a	Symbolically starts your day; gets your mind in the right place to help your clients and work with your team
8:30-9:00	First Thing Call	n/a	Zoom/Skype, TodayApp	Status update of team goals, role-play scenarios, builds community
9:00-10:00	Client Care Activities (Claims, BOD, Cases, Voicemail, U/W Folders, Emails)	Outbound/Inbound Service Scripts	TodayApp, Outlook	Ensures important office functions are done each day
10:00-10:45	Comfort Calls	Outbound Service Scripts	TodayApp	Show the clients that the agency is there for them and add value without asking for money
10:45-11:00	Take a walk/stretch	n/a	n/a	Assists your productivity, mental clarity, focus, physical health
11:00-Noon	Client Care Activities, Log morning activities in TAP	Outbound/Inbound Service Scripts, Quick Actions, Manual Entry	TodayApp, Outlook	Makes sure that team leaderboard will be up-to-date at lunch
Noon-12:30	Lunch	n/a	n/a	Rest, nutrition, etc.
12:30-1:30	Comfort Calls	Outbound Service Scripts	TodayApp	Same as above
1:30-2:00	Call Your Newest Written Clients for Referrals/Client Profiles	Outbound Sales → Asking for Referral Script	TodayApp	Add quality leads, production
2:00-3:00	Follow up on pivots from previous day	n/a	Outlook, Skype	Ensures your pivots are closing
3:00-3:15	Take a walk/stretch	n/a	n/a	Assists your productivity, mental clarity, focus, physical health
3:15-4:00	Comfort Calls	Outbound Service Scripts	TodayApp	Same as above
4:00-4:30	Make sure all activities/tasks are complete	n/a	TodayApp, Outlook	Helps build closure for the day
4:30-4:45	Make sure all activities and production are put in TodayApp	Outbound/Inbound Service Scripts, Quick Actions, Manual Entry	TodayApp	Allows you to know what you have contributed to your team today
4:45-5:00	Make a to-do list for tomorrow	n/a	Outlook, Paper Notebook	Sets the tone for tomorrow, helps you close out today
5:00	Closing Ritual	n/a	n/a	Will be unique to you, symbolic end of the workday