

# Scheduling and Managing Reviews

## Best Practice

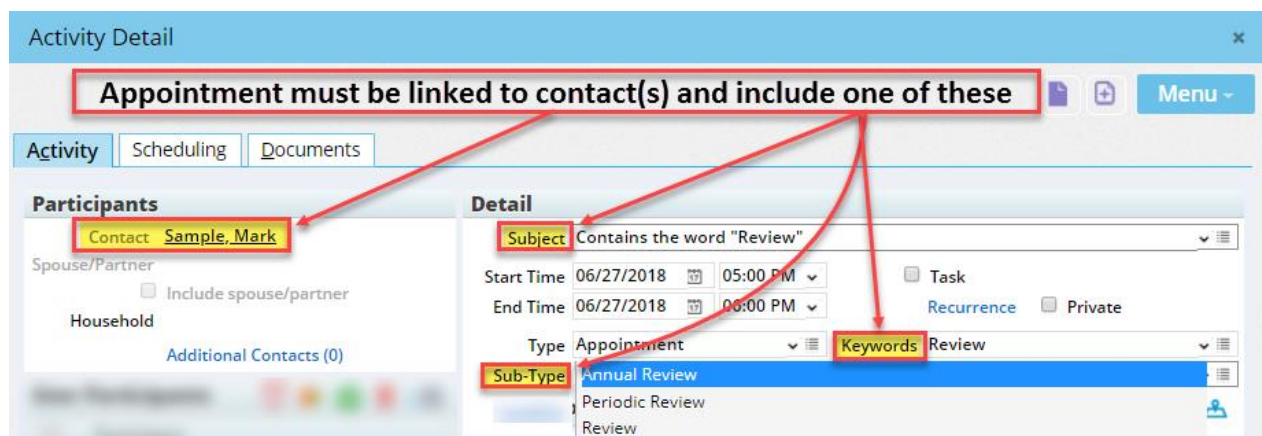
Staying in touch with clients is vital to maintaining relationships that you have worked hard to build.

A service model delivers a positive end-to-end experience and creates loyal clients by helping you keep promises. The ideal time to schedule the next review meeting is when you're in front of the client, so be sure to discuss agenda items for the next meeting and set the next appointment date in SmartOffice. It's a valuable customer relationship management tool that helps you efficiently manage the review process.

## Scheduling Reviews in SmartOffice

Review appointments **must be linked to a contact** and include **one** of these items:

**Subject** line contains **Review** | **Sub-Type** of **Review**, **Annual Review** or **Periodic Review** | **Keyword** of **Review**



Activity Detail

**Appointment must be linked to contact(s) and include one of these**

Activity | Scheduling | Documents

**Participants**

Contact: **Sample, Mark**

Spouse/Partner: ☐ Include spouse/partner

Household: ☐ Include spouse/partner

Additional Contacts (0)

**Detail**

**Subject**: Contains the word "Review"

Start Time: 06/27/2018 05:00 PM

End Time: 06/27/2018 06:00 PM

Type: Appointment

**Sub-Type**: Annual Review

**Keywords**: Review

Task: ☐ Task

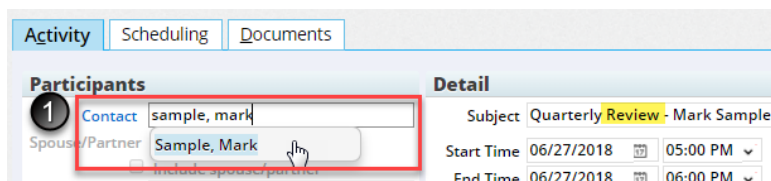
Recurrence: ☐ Recurrence

Private: ☐ Private

## Scheduling Reviews in Outlook (OWA)

Be sure to include the word **Review** in the title line.

If the client is added as the **first** attendee in Outlook and the same email address is present in SmartOffice, the appointment will **automatically link to the SmartOffice contact during the calendar sync**. No further action is required.



Activity | Scheduling | Documents

**Participants**

1 Contact: **sample, mark**

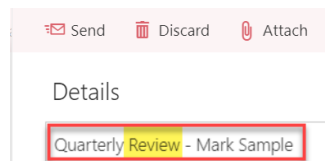
Spouse/Partner: ☐ Include spouse/partner

**Detail**

Subject: Quarterly **Review** - Mark Sample

Start Time: 06/27/2018 05:00 PM

End Time: 06/27/2018 06:00 PM



Send | Discard | Attach

Details

Quarterly **Review** - Mark Sample

In SmartOffice, if the synced appointment is not linked to a contact:

1. Open the activity, search for and select the contact...

**Options**

Reminder: 5 Minutes

Priority: Normal

Call Script

☒ Track Activity Outcome

Due Date: [ ]

Minutes Spent: 0


Link to...

**Save & Close** **Cancel**

2. Check the box to **Track Activity Outcome**.
3. Select **Save & Close**.

## Scheduling Next Review as Activity Outcome

The ideal time to schedule the next review is when you are marking the meeting you just held as **Done**.

<input type="checkbox"/>	Type	Activity Date	Mark Done	Contact Name	Subject
<input type="checkbox"/>	Appointment	03/15/2018		Sample, Mark	Quarterly Review - Mark Sample

Select **Contact Made** with an outcome of **Schedule New 'Appointment' Activity**, add **New Activity Details** and **Outcome Notes** for the next meeting.

**Activity Outcome - Sample, Mark**

**Select an Outcome**

☐ No Contact Made ☒ Contact Made

**Outcome Options**

- Reschedule Activity
- Sale Lost
- Sale Made
- Schedule New 'Appointment' Activity**
- Schedule New 'Call' Activity
- Schedule New 'To Do' Activity

**Completed Activity Details**

Contact: Sample, Mark

Subject/Description: Quarterly Review - Mark Sample

Start Time\*: 03/15/2018 05:00 PM

End Time\*: 03/15/2018 06:00 PM

Minutes Spent: [ ]

**New Activity Details**

Create Activity On: 06/27/2018 05:00 PM

Assign To: [ ]

Subject: Quarterly Review - Mark Sample

☒ Check Participant(s) Availability

☐ Add more activity details after this window

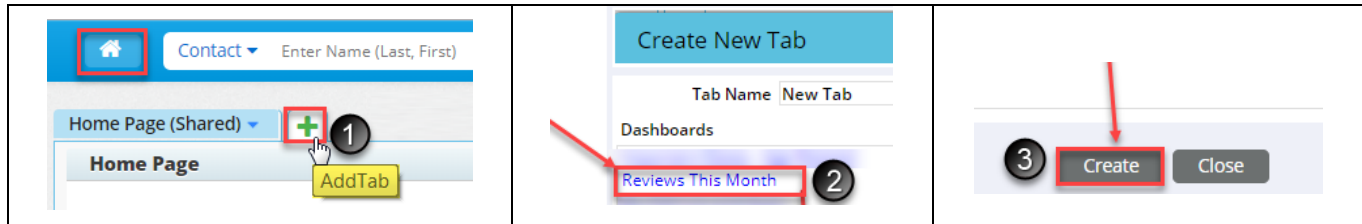
**Outcome Notes**



Discuss next time we meet:

1. Check in – See if parents sold home
2. See if made a decision on setting up Will – Roles & amounts?

**Formatting options**

## Add "Reviews This Month" Dashboard to SmartOffice Home Page



Home Page (Shared) | Important Dates - Age related | My Work Status | **Reviews This Month**  

**Review Appointments Scheduled Current Month**

Activity Date?	Type	Contact Name	Type	Sub-Type	Subject	Description
06/06/2018	Appointment	Douglas			Annuity review	
06/20/2018	Appointment	Dawn M	Client	Tier 3	Review	Need to know how to pay back loan. Can she pay per month automatic towards loan. Need to change the div. option to reduce loan. Need to review annuities.

**Review Dates This Month With No Activity Scheduled Next 60 Or Previous 30 Days**

Contact Name?	Type	Sub-Type	Review Date	Preferred E-mail
Charles W	Client		06/03/2007	

## We Can Help!

For **browser, access or technical issues**, call the Support Line at **1-800-499-8820**.

For **specific tasks or questions** about using SmartOffice, send an email to [SmartOffice@glic.com](mailto:SmartOffice@glic.com).

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