DAILY CSR CHECKLIST

Print and keep at your desk · Run top-to-bottom every day

Start of day (first 30–45 minutes)

- ☐ Check overnight RingCentral voicemails and the shared/owner inbox; action anything time-sensitive first.
- ☐ Open AgencyZoom and clear the exception list before starting new work.
- ☐ Work the service pipelines in priority order (see bottom of page).
- ☐ Scan the calendar: scheduled reviews, promised callbacks, and yesterday's follow-ups.
- ☐ Verify yesterday's transactions actually posted in AMS360 — confirm nothing errored out.

Throughout the day

- ☐ Answer every call live, promptly, and on a smile.
- ☐ Run each request through the 8 steps: validate → confirm contact info → listen → restate → complete → follow up → document → confirm it posted.
- ☐ Do a 60-second mini-review on every call — see something, say something.
- ☐ Document in AMS360 as you go, not "later."
- ☐ Return texts within SLA; log the substantive ones.

End of day (last 20 minutes)

- ☐ Zero unactioned voicemails; AgencyZoom exception list clean (or a documented reason it's still open).
- ☐ Every commitment you made today has a task and date in AgencyZoom.
- ☐ All transactions documented; signatures requested where needed.

PIPELINE PRIORITY

AgencyZoom pipeline priority (work top-down):

Pending Cancellations (every item, always) → Claims (no activity 5+ bus. days) → General Service (no activity 3+ bus. days) → PL / CL Renewals (within 60 days; 30 days = urgent).

E&O PROTECTION

Daily non-negotiables: respond to inbound within 1 business day · keep open E&O / compliance flags at zero · if it wasn't written in AMS360, it didn't happen.