



**Task:** Logging opportunities on MSD

**Time Needed:** 30 mins



**Task:** Pro-active follow-up calls to new customers

**Time Needed:** 60 mins



**Task:** Reading bulletins

**Time Needed:** 30 mins



**Task:** MTA's

**Time Needed:** 30 mins



**Task:** New business quote

**Time Needed:** 30 mins



**Task:** Checking Yammer

**Time Needed:** 15 mins



**Task:** Notification of a claim

**Time Needed:** 30 mins



**Task:** Coaching session with manager  
at 3pm

**Time Needed:** 30 mins



**Task:** i-achieve e-learning module (that must be completed by end of the week)

**Time Needed:** 30 mins



**Task:** Ordering literature as stock running low

**Time Needed:** 30 mins



**Task:** Answering incoming calls

**Time Needed:** 30 mins



**Task:** Updating notepad

**Time Needed:** 60 mins



**Task:** Completing work actions

**Time Needed:** 45 mins



**Task:** Checking CSC logs

**Time Needed:** 15 mins



**Task:** Checking emails/voicemails

**Time Needed:** 15 mins



**Task:** Booking reviews for agents

**Time Needed:** 60 mins



**Task:** Processing renewals

**Time Needed:** 150 mins



**Task:** Cancelling a policy

**Time Needed:** 30 mins



**Task:** Obtaining and passing leads to  
LLC/FA

**Time Needed:** 60 mins



**Task:** Outbound calls to single policy  
customers

**Time Needed:** 60 mins



**Task:** Chatty customer walks in at 4.30pm for an update on a claim

**Time Needed:** 30 mins



**Task:** Agent calls in from renewal review and needs 2X car & 3X commercial vehicle policy info

**Time Needed:** 30 mins