



# Client First Timeline

## Phase 1

4th Quarter 2022 to  
1st Quarter 2023

- Client "Reach" Questions & Answers Initiative
- Client Satisfaction Survey
- Employee Engagement
- Customer Service Standard
- Relationship Building Campaign

## Phase 2

2nd Quarter 2023

- Client Satisfaction Survey Results Action
- Department Specific Process & Procedures
- Company Culture
- Client Stewardships

## Phase 3

3rd Quarter 2023

- Internal/External Communication
- Client Renewal Meetings
- Target List Initiative – Non-Serviced Accounts
- Training, Development & Mentoring Program
- Demonstrating Value

## Phase 4

3rd Quarter 2023

- Core Attributes
- On-line Marketing
- Negative Comments Action
- New Business Reports & Service Set-up

## Phase 5

4th Quarter 2023

- Social Media Ratings
- Client First Guarantee Contract
- Client Participation Promotions
- Client Products/Resources
- Carrier/Broker Relationships
- Internal Resources
- Lost Business Action