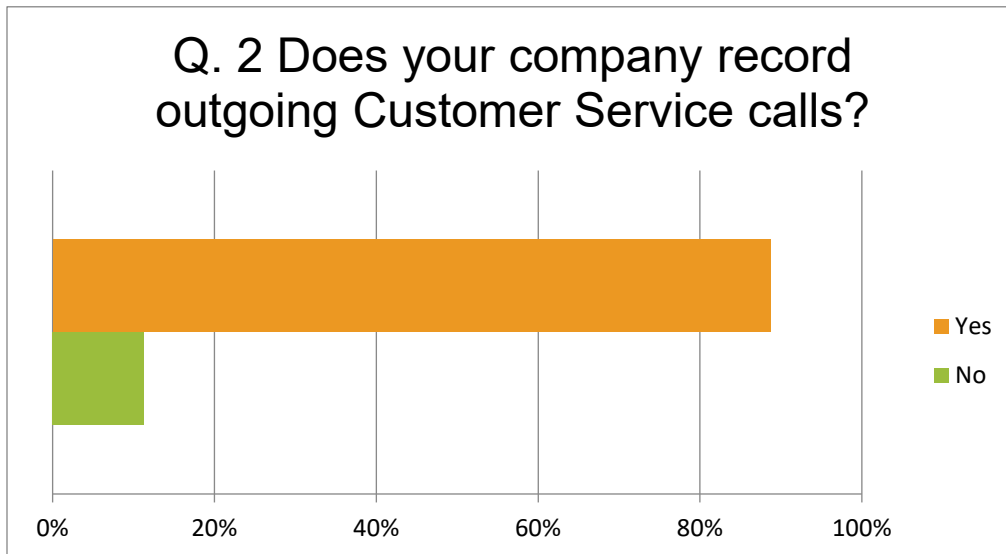
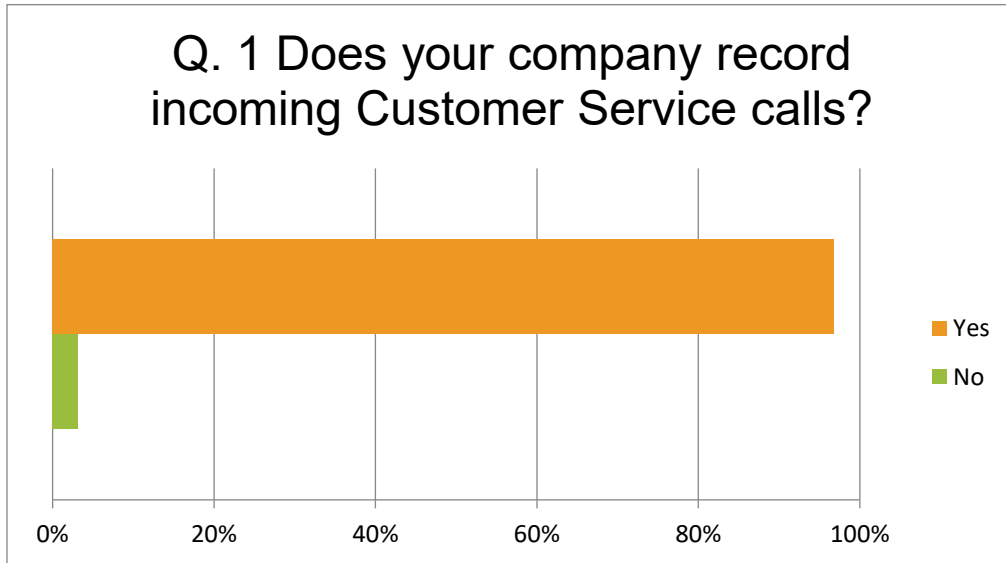


CEFLI Quick Poll

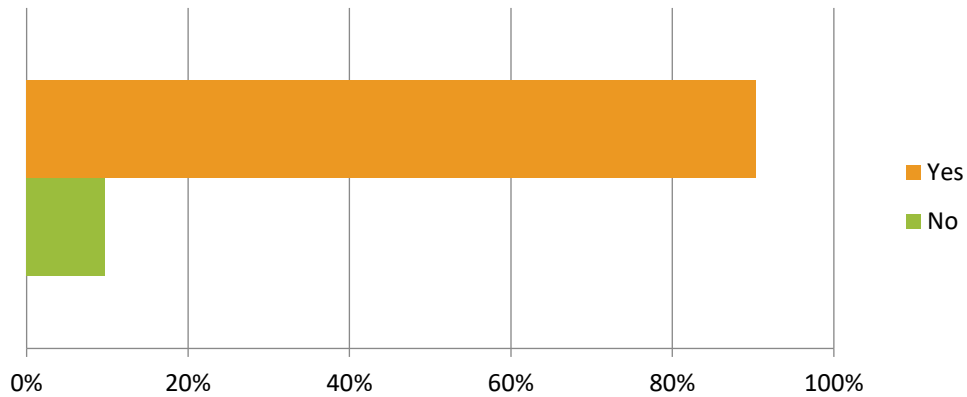
August 2018

Customer Call Recording Practices (43 responses)

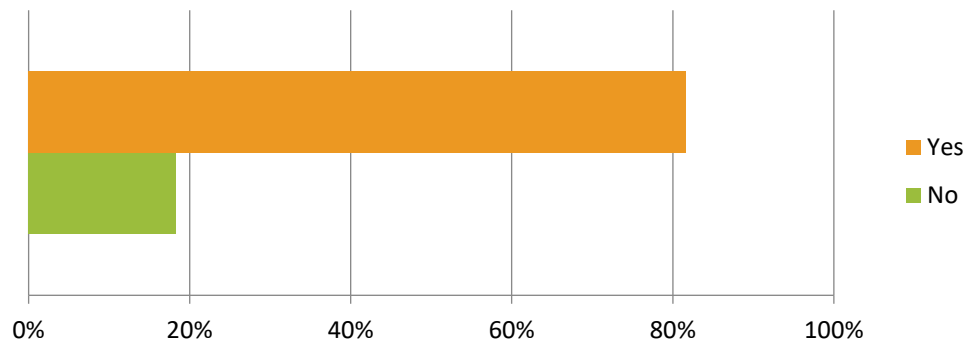
CUSTOMER SERVICE



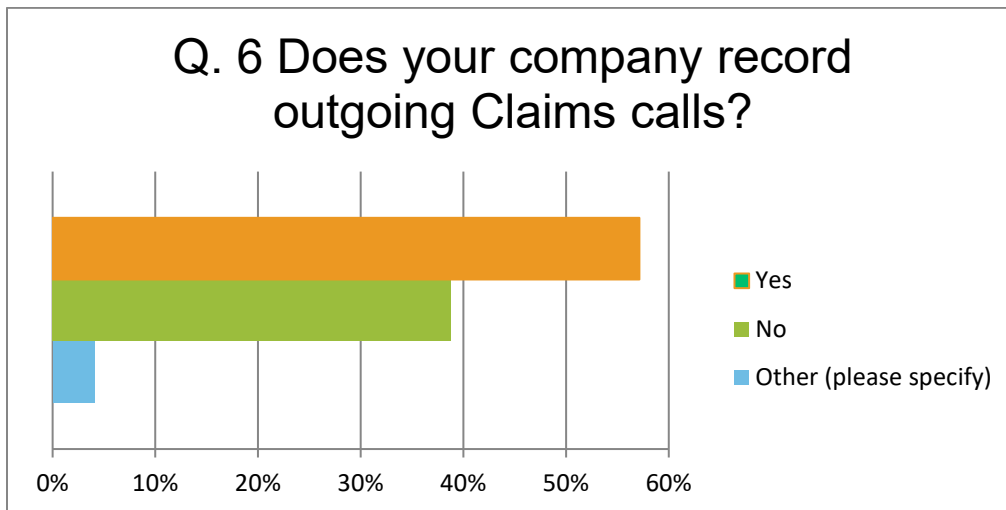
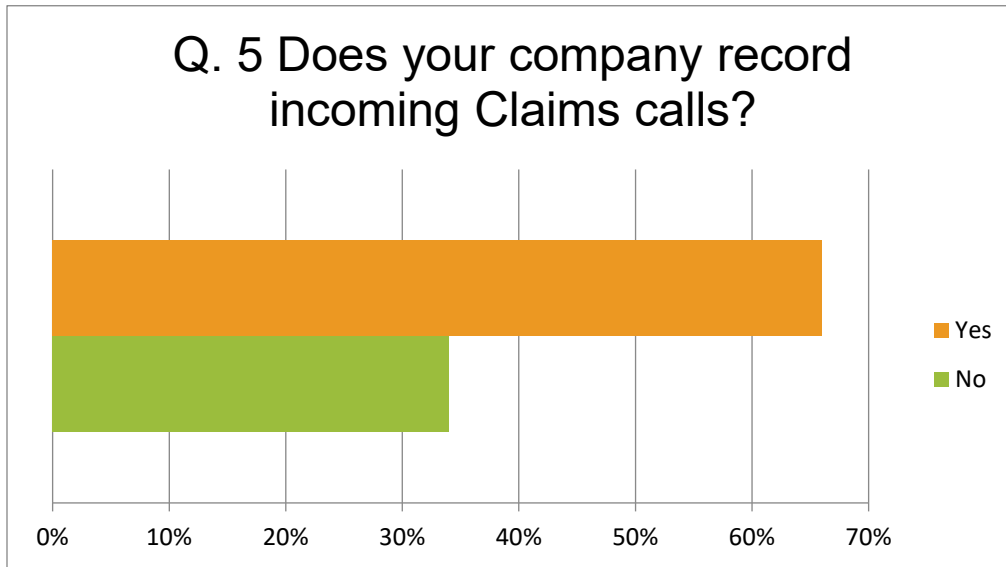
Q. 3 If an incoming call is escalated to a Customer Service supervisor, is the call recorded?



Q. 4 If a call is escalated to a Customer Service supervisor and the supervisor calls the customer back, is the call recorded?

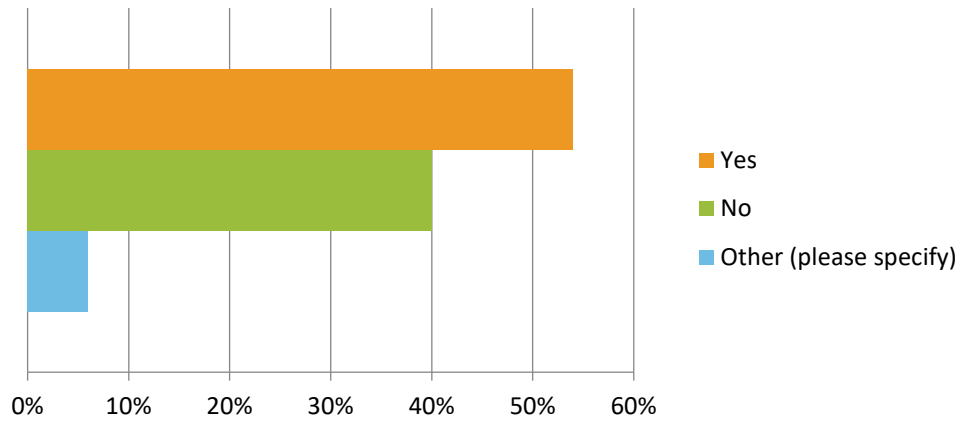


CLAIMS



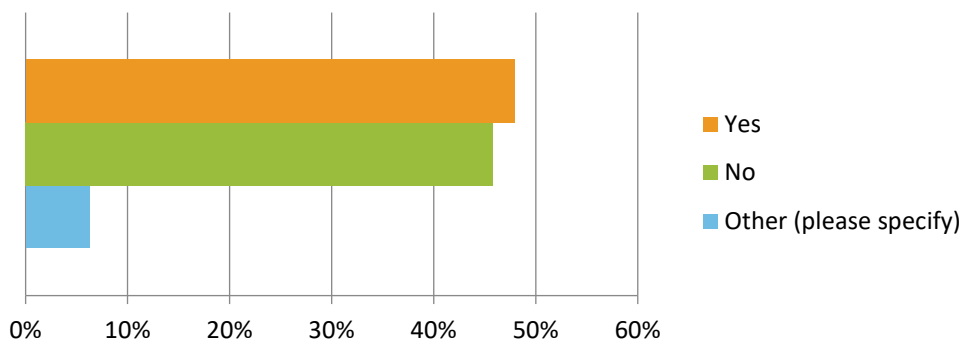
- **Other:**
 - Yes, though certain calls may not be on recorded lines.
 - It depends on who is making the call.

Q. 7 If an incoming call is escalated to a Claims supervisor, is the call recorded?



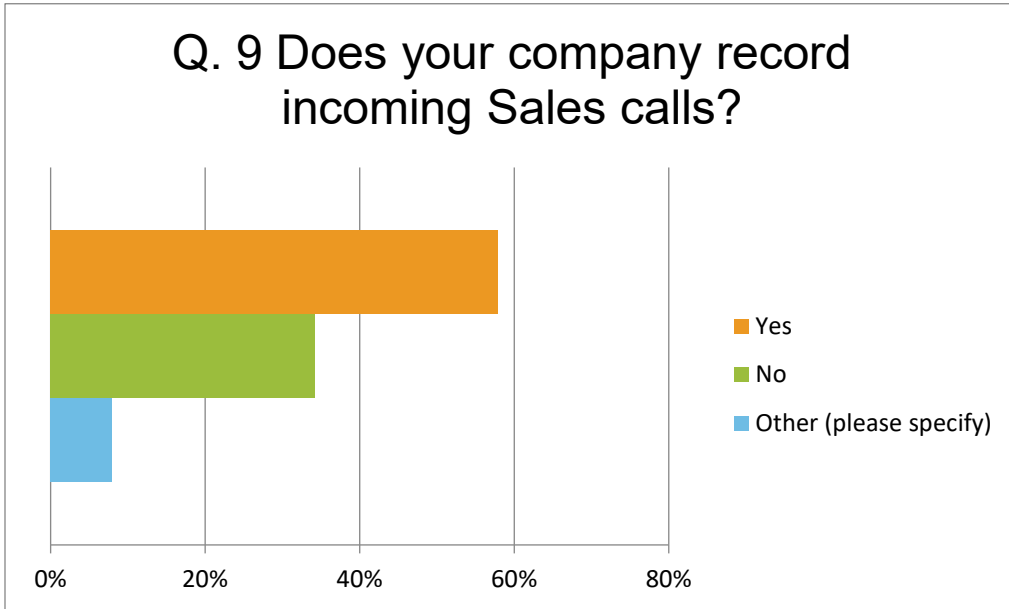
- **Other:**
 - It depends on how "escalated" it becomes.
 - It depends on who is making the call.

Q. 8 If a call is escalated to a Claims supervisor and the supervisor calls the customer back, is the call recorded?



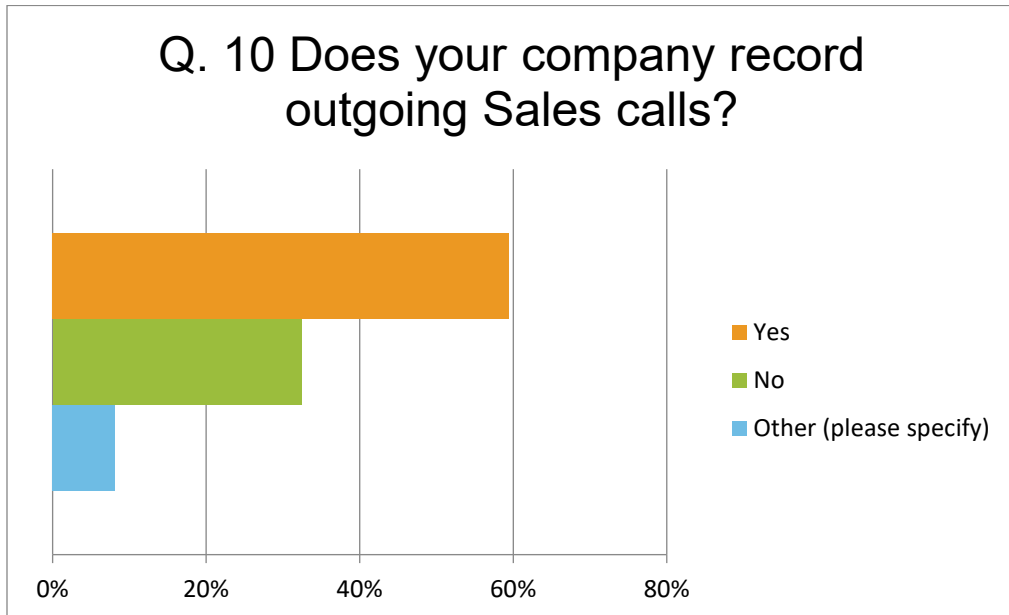
- **Other:**
 - It depends on how "escalated" it becomes.
 - It depends on who is making the call.

SALES/DISTRIBUTION



- **Other:**

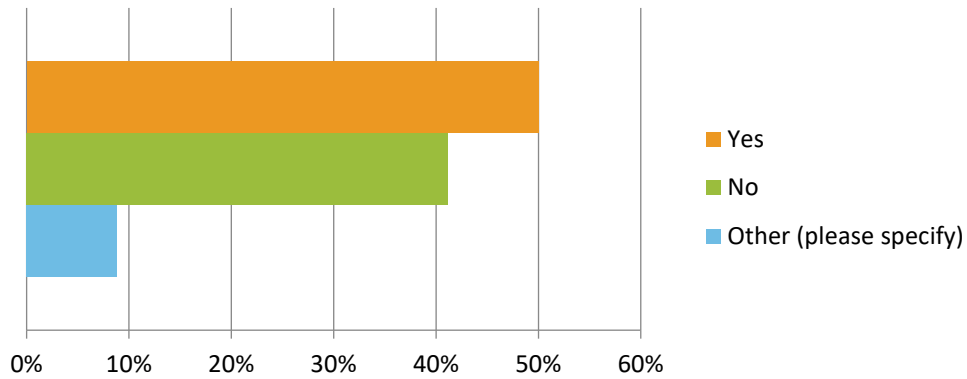
- Yes, if received on Automated Call Distributor (ACD line). Personal lines are not recorded.**
- Calls coming into internal sales desk are recorded.**
- Incoming agent calls are recorded.**



- **Other:**

- Yes, if originated on Automated Call Distributor (ACD line). Personal lines are not recorded.**
- Calls made by internal sales desk are recorded.**
- Most calls to agents are recorded.**

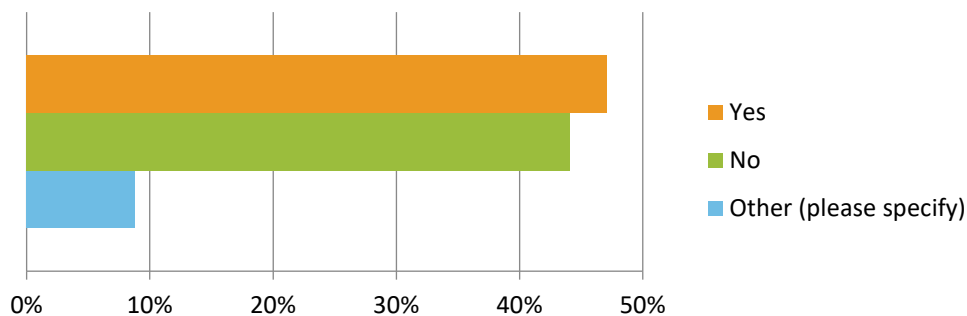
Q.11 If an incoming call is escalated to a Sales supervisor, is the call recorded?



- **Other:**

- Yes, if received on Automated Call Distributor (ACD line). Personal lines are not recorded.
- Most are, but it depends how high it is escalated
- Sometimes.

Q. 12 If a call is escalated to a Sales supervisor and the supervisor calls the customer back, is the call recorded?

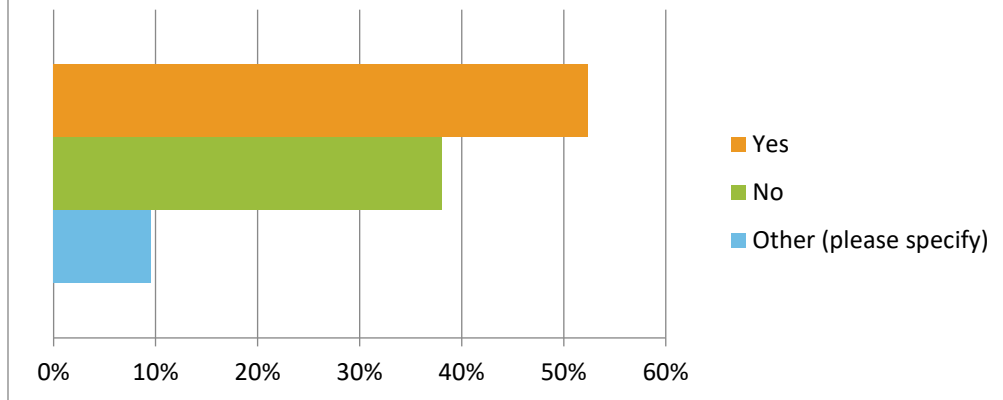


- **Other:**

- Yes, if originated on Automated Call Distributor (ACD line). Personal lines are not recorded.
- Most are, but it depends how high it is escalated
- Sometimes.

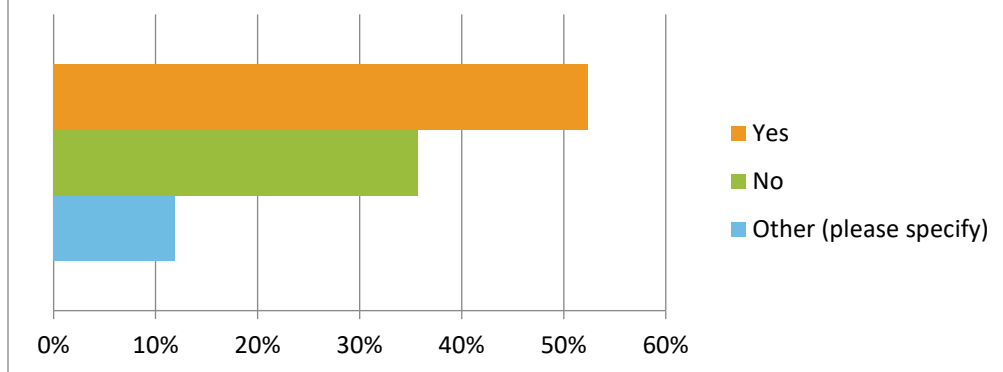
UNDERWRITING/NEW BUSINESS

Q. 13 Does your company record incoming Underwriting/New Business calls?



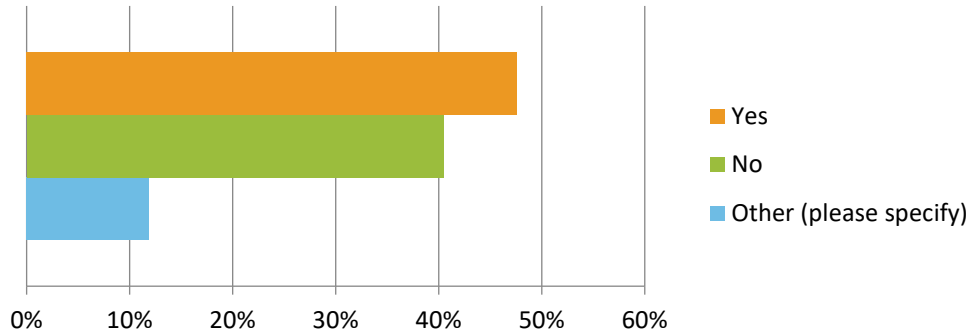
- **Other:**
 - **New Business calls are recorded, underwriting calls are not.**
 - **Yes for financial transactions only (Accounting team), not underwriting calls.**

Q. 14 Does your company record outgoing Underwriting/New Business calls?



- **Other:**
 - **New Business calls are recorded, underwriting calls are not.**
 - **Yes for financial transactions only (Accounting team), not underwriting calls.**
 - **In certain instances calls to agents are recorded by New Business**

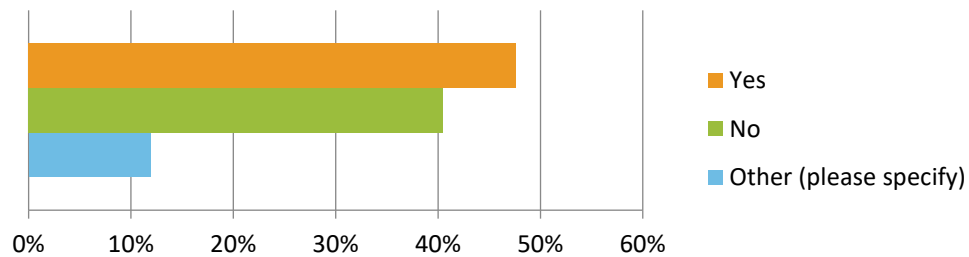
Q. 15 If an incoming call is escalated to an Underwriting/New Business supervisor, is the call recorded?



- **Other:**

- Yes if received on ACD line. Personal lines are not recorded.
- It depends on the position of the person taking the call.
- Calls taken by the Supervisor of the Accounting team are recorded.
- Sometimes.
- New Business calls are recorded, Underwriting calls are not.

Q. 16 If a call is escalated to an Underwriting/New Business supervisor and the supervisor calls the customer back, is the call recorded?



- **Other:**

- Yes if originated on ACD line. Personal lines are not recorded.
- It depends on the position of the person making the call.
- Calls made by the Supervisor of the Accounting team are recorded.
- Sometimes.
- New Business calls are recorded, Underwriting calls are not.