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Revised By:	Joshua Graves	**Review Cycle/Date:**	Annual
Reviewed By:	Fonda Logston	**Reviewing Unit:**	Customer Services
Title:	ABRM Daily Case Monitoring SOP		
Description:	This is the standard operating procedure for ABRMs to monitor their cases daily.		

ABRM Daily Case Monitoring

Standard Operating Procedure

1. General Statement of Purpose
   - 1.1 This document contains the daily steps for ABRMs, or a delegate, to monitor the cases for the agency they support.
2. Scope
   - 2.1 This standard pertains to all Agency Business Relationship Managers (ABRMs).
3. Discipline
   - 3.1 Relationship Management Standards
4. Terms and Definitions
   - 4.1 ABRM or Agency Business Relationship Manager – An agency's business representative.
   - 4.2 CRM or Customer Relationship Management – A customer service tool used to work, track, and update customer incidents.
5. Instructions
   - 5.1 Upon arrival to work each day and periodically throughout the day:
     - 5.1.1 Run search in CRM to find any new Incident Level 1 or 2 Cases submitted on behalf of your agencies. Add yourself as an interested party to each of them. Review them and become familiar with the cases and issues.
     - 5.1.2 Run search in CRM to find any new Incident Level 3 Cases since the last time you ran the query. Review them to determine if there are any cases that need to be elevated. To elevate a case, follow the Escalation and Elevation Operating Procedures. If you elevated any cases, add yourself as an interested party on the case. You are looking for cases that are nearing their SLA of 7 days and are not in the working status, have not had notes updated recently, or appear to be a Service Request instead of an incident.
     - 5.1.3 Run search in CRM to find any cases that are waiting on partner. Review those cases to determine if you can answer any of the questions the technicians are waiting for the customer on.
     - 5.1.4 Check voice mail for callbacks from your customers.
     - 5.1.5 Check email to determine if there are issues you need to elevate from customers.

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6. Roles and Responsibilities
   6.1 The ABRM is responsible for following the steps provided to monitor their agency's cases.
7. Limitation or Implementation Notes
   7.1 In order to follow the steps in this operating standard to monitor their agency's cases, the ABRM must have access to CRM and Outlook.
8. References
   8.1 ABRM Daily Review User Guide.