

# Daily Workflow Snapshot

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This page outlines the standard daily schedule and task checklist for all Customer Support Representatives (CSRs) at Crowned Credit. Following this workflow ensures consistent client experience, no tasks fall through the cracks, and every shift ends with a clean handoff.

### **📌 Important**

This snapshot is based on a standard shift. Shift times vary by team member and timezone. Adjust start/end times to your assigned schedule. The order of tasks remains the same regardless of shift time.

## Shift Start — First 30 Minutes

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The first 30 minutes of every shift are for orientation and setup.

### ? Startup Checklist

#	Task	Where	Est. Time
1	Log into GHL, Aircall, DisputeFox, SmartCredit	All platforms	5 min
2	Check GHL Inbox for unread messages (SMS, email, chat)	GHL → Conversations	10 min
3	Review missed Aircall calls and voicemails from previous shift	Aircall Dashboard	5 min

#	Task	Where	Est. Time
4	Check team communication channel for updates or announcements	Team channel	5 min
5	Pull up your task queue and call list for the day	GHL Tasks / Daily Tracker	5 min

## Morning Block — Hours 1–3

The first active working block is focused on **urgent messages and high-priority callbacks**. Start with what's most time-sensitive.

### Morning Tasks

Priority	Task	Notes
☐ <b>First</b>	Respond to urgent/upset clients from overnight	Never let these wait — churn risk
☐ <b>Second</b>	Return missed calls from previous shift	Start with most recent missed calls
☐ <b>Third</b>	Clear remaining unread GHL inbox messages	Bottom-up approach — oldest first
☐ <b>Then</b>	Begin scheduled outbound calls for the day	Check daily call list / GHL tasks

## Midday Block — Hours 3–5

The midday block is for **structured work** — update calls, special tasks, follow-ups on processing issues.

### Midday Tasks

- Complete scheduled client update calls — walk through dispute round results, answer questions
- Respond to any new inbound SMS/messages received
- Flag any billing concerns to the Billing team with GHL notes and a direct notification
- Resolve credit monitoring issues and notify the Dispute Team through Whatsapp accordingly
- Respond to any support requests from other departments in the Customer Support Discord channel

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## Afternoon Block — Hours 5–7

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The afternoon block focuses on making sure that all urgent and pending tasks are resolved and accounted for.

### Afternoon Tasks

- Follow up on any open tasks from earlier in the shift that weren't resolved
- Review your task list and close or reschedule any incomplete items
- Check GHL inbox again for any new messages that came in since morning
- Update GHL notes for any relevant client interactions that happened today
- Coordinate with team members on any shared client concerns or escalations
- Follow up on review requests from clients that had a positive experience

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## Shift End — Last 30 Minutes

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The end-of-shift routine is just as important as the startup. A clean close ensures the next shift starts without confusion.

### ? End-of-Shift Checklist

#	Task	Where
1	Clear all unread GHL inbox messages — respond or tag for follow-up	GHL → Conversations

#	Task	Where
2	Set Aircall status to "Offline" or "After Hours"	Aircall app
3	Complete all open GHL tasks or push to next shift with a note	GHL → Tasks
4	Write a handoff note for any urgent client situations	Team channel or GHL note
5	Log any pending escalations with team lead	Discord

**⚠ Never Do This at Shift End**

Do not log off with unread messages, open tasks with follow up or reschedule, or Aircall still set to "Available."

Revision #14

Created 2026-03-20 14:18:45 UTC by Cassandra

Updated 2026-03-25 14:46:19 UTC by Cassandra