



AND



16 Best Practices for Using a Scheduler

- Communicate clearly and often
- Set tangible goals and expectations
- Set up a 10-15 minute call each week to catch up
- Provide clear directions of how you would like your scheduler to deal with information on your list that is out of date
- Make sure your scheduler knows who to forward any requests for more information to
- Encourage a team mentality with other members of your wholesaler team and your scheduler
- Make sure your scheduler knows how you prefer to be contacted and a reasonable expectation for how quickly you will respond to their communication
- Your scheduler should contact you in your preferred contact method and should respond to you within an hour during normal business hours
- Communicate any new relationships or partner levels to your scheduler so they can use this information during their calls
- Identify priorities weekly
- Zone out your calendar as far out as possible
- Notify your scheduler of any changes to your schedule as soon as possible
- Share feedback on meetings so your scheduler can update their call rotation based off your feedback
- If you are having a problem with your scheduler, address it with them immediately and if the problem continues, contact your Relationship Management Team