Participant comments from Jeff Mowatt's
Trusted Advisor Customer Service
seminars held February 22, 2023

"What a great presentation! There was so much we can take away in interacting with our partners and clients in every department to leave them with better experiences, and more trust in our employees and our products."
Michelle Wong, VP Client Care

"Jeff's seminar was amazing, interactive and informative. I think our organization will benefit from this session as it provided tools for us to connect with clients on a deeper level and retain more policies."
Jeniece Puckrin, Retention & Premium Finances

"It was great and very interactive! This will help with our cancellation rates and help better connect with our clients."
Raveena Gill, Client Care

"Jeff's session was awesome. It will help me to restructure my conversations with customers, brokers and my coworkers, in emails and on the phone."
Tewa Madi, Client Care Rep.

"This was very helpful. This is going to be great to bring to our training. Lots of great tips."
Breann Lillies, Training Supervisor

"Consistent application of personalized and trusted advice and service to all our partners and customers, regardless of the situation."
Mark Dutton, COO

"It will help me change the way I talk to brokers when educating them to sell our products."
Deidra Lengyel, Partner Success Rep

"We will filter this information forward to not only team members, but to our sellers of Optiom (brokers & dealers) who need to be trusted advisors in their fields."
Kirsten Rempel, VP National Business Development & Marketing

"We will be more comfortable using language that connects to help customers understand our value and improve retention."
Christine Campbell, Director Client Care Operations