



**2018 Nebraska FBLA
CLIENT SERVICE
PRELIMINARY CASE STUDY**

INSTRUCTIONS

1. Respond to the scenario below by providing your best solution to the situation.
2. Prepare your solution report using double spaced text 12-point font and one inch side margins. No more than 2 pages.
3. Include a bibliography of research support as a third page of the document using any acceptable bibliography format.
4. Place the event name, competitor's name, and chapter name in the upper right corner of the page.
5. Submit your solution by the SLC registration deadline of February 14.

Client Service Scenario

Background Information

You are a Customer Service Representative with Loper Insurance Company. You handle all calls related to benefits, renewals, and contact information updates at the company's regional office.

Scenario

Mr. Smith called into Loper Insurance Company's customer service number. You answer his call.

Mr. Smith informs you that his insurance policy was to be canceled back in October 2016 due to the sale of the property. He states that he had contacted his insurance agent in October 2016 once the sale of the property was final. The insurance agent had not submitted the information into the online system. Hence, his policy has been withdrawing monthly transactions for over a year.

Mr. Smith is upset with the situation and the lack of communication by the insurance agent. He would like you to fix his problem. It is company policy to collect all documentation from clients before resolving any issue.

- How would you respond to Mr. Smith?
- How would you convince Mr. Smith to remain with Loper Insurance Company?
- What would you do to make sure that Mr. Smith's policy issue is canceled this time?