

Zoom script for handling Congruent client enquiries

Date: 13/02/2015

Version: Pre-live

If the caller does not ask for a named Congruent individual and it is an enquiry with respect to one of our services the following script should apply:

If the caller is calling in a individual capacity (not in relation to a business) Congruent provides the [Investment, Insurance and Pension Redress Service](#).

If he is calling with respect to a business (he may be a owner, director and/or partner of the business) Congruent provide the following services:

IRHP Redress Service

FRL Redress Service

Expert Redress Report

RIsk Management

Debt Financing and Restructuring

Expert Evidence Service

New enquiry from an Individual

It is an individual please go to the Contact Us page

<http://congruentfinancialpartners.com/contactus/> and complete the form. Please note in the message box that this is a **message from Zoom**. An example form is shown below:

Contact us

Please complete all fields:

Are you:	An individual <input checked="" type="radio"/> OR A business <input type="radio"/>
Enquiry type:	<input checked="" type="radio"/> Investment, Insurance and Pension Redress
Product type:	<input type="radio"/> Pension Transfer / SIPP <input type="radio"/> Structured Products <input type="radio"/> Annuity <input type="radio"/> Whole of Life <input checked="" type="radio"/> Mortgage Endowment <input type="radio"/> PPI <input type="radio"/> Other
Your name:	<input type="text" value="Nasar Zamir"/>
Your email:	<input type="text" value="nz@congruentfinancialpartners.com"/>
Your telephone:	<input type="text" value="07757777009"/>
Message:	<input type="text" value="I need help with an endowment claim."/>

The caller should receive an email which has the following information (Nasar Zamir will be replaced by the callers name):

Dear Nasar Zamir

Enquiry number: 1050

Service: Investment, Insurance and Pension Redress

Product: Mortgage Endowment

Thank you for contacting us.

Please find attached some links to our website including engagement letter and terms and conditions.

- [Engagement Letter](#)
- [Factsheet](#)
- [Terms and Conditions](#)

We would like you to complete a questionnaire in relation to your enquiry which can be downloaded from our website:

- [Questionnaire](#)

Please give us as much information as possible so that we can assist you. Please send this information to enquiries@congruentfinancialpartners.com (quote the above enquiry number). Upon receipt of this information a technical specialist from Congruent will be in contact with you by close of business the next working day.

Kind regards
Congruent Financial Partners

Please ask them to complete the Questionnaire and send back to the enquiries@congruentfinancialpartners.com. When completed a technical specialist will be in contact with them by close of business the next working day.

If the caller does not have access to email then please obtain the address to send the "information pack" (this will be the Engagement, Factsheet, Terms & Conditions and Questionnaire). Please complete the rest of the Contact Us form (as above) and instead of caller's email address please enter the email address of directors@congruentfinancialpartners.com. Note in the message that the caller should be sent the "information pack" to their address (please also note the address in this box).

Existing enquiry from an Individual (pre-engagement)

Please complete the following information:

Reference number (if known)	
Name	
Tel No:	
Email:	
Nature of enquiry	
Preferred contact method (e.g. phone / email)	
Preferred time of call (e.g. day / time)	

When complete please send back to the enquiries@congruentfinancialpartners.com. Please advise the caller that a technical specialist will be in contact with them as soon as possible.

Enquiry from an individual (post-engagement)

An existing client should have known to them the name of the Congruent staff handling their case. If no name is given or you do not have the direct contact details of the staff please complete the following details and send to directors@congruentfinancialpartners.com. Please advise the caller that Congruent will

be in contact with them as soon as possible.

Reference number (if known)	
Name	
Tel No:	
Email:	
Nature of enquiry	
Preferred contact method (e.g. phone / email)	
Preferred time of call (e.g. day / time)	

Enquiry from a Business

For new enquiry please contact Nasar Zamir or in his absence Roger Grenville-Jones. If neither of these two individuals are available (for any reason) please complete the Contact Us page as per the same instructions for an Individual and note in the message box that this is a **message from Zoom**.

Contact us

Please complete all fields:

Are you: An individual OR A business

Enquiry type:

- IRHP Redress Service
- FRL Redress Service
- Expert Redress Report
- Risk Management
- Debt Financing and Restructuring
- Expert Evidence Service

Your name:

Company:

Your email:

Your telephone:

Message:

The following confirmation email will be sent to the client in this case.

Thank you for your enquiry. We will contact you shortly with our response.

The following is a record of your enquiry:

Message:
Need some help with risk management service.

Enquiry from a Solicitor

For new enquiry from solicitor or an advisor to an individual or business please put the call through to Roger Grenville-Jones or in his absence Nasar Zamir.

150 Minorities Reception calls

Check VIP list or Take caller details and Transfer to Nasar Zamir, no answer, leave voicemail on Mobil & Email message to nz@congruentfinancialpartners.com

Ask for by name

See attached Excel Sheet for individual instructions

General Company Call

Check VIP list or Take caller details and Transfer to Nasar Zamir, no answer, leave voicemail on Mobil & Email message to nz@congruentfinancialpartners.com

Congruent Accounts / Finance Calls

Check VIP list or Take caller details and Transfer to Roger Grenville-Jones, no answer, leave voicemail on Mobil & Email message to rgj@congruentfinancialpartners.com

Complaints

Check VIP list or Take caller details and Transfer to Roger Grenville-Jones, no answer, leave voicemail on Mobil & Email message to rgj@congruentfinancialpartners.com

Marketing

Check VIP list or Take caller details and Transfer to Nasar Zamir, no answer, leave voicemail on Mobil & Email message to nz@congruentfinancialpartners.com

Media Calls

Take caller details and Transfer and Transfer to Roger Grenville-Jones, no answer, leave voicemail on Mobil & Email message to rgj@congruentfinancialpartners.com