

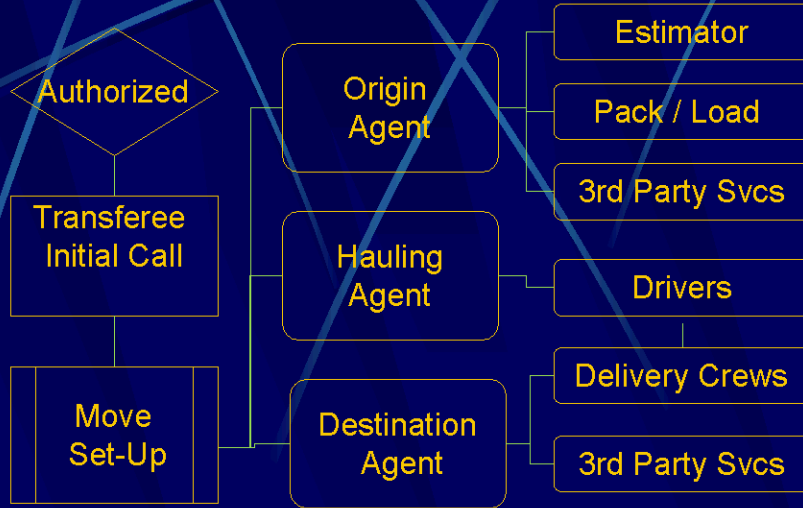
# **Moving in the “Heat Of Summer”**

The Reality of Household Goods

## **Panel Introduction**

- |   |  |
|---|--|
| ● Customer Service<br><i>Nancy Matson</i> | ● Dispatch<br><i>Steve Gipson</i>      |
| ● Origin Services<br><i>Kathy Nelson</i>  | ● Owner Operator<br><i>Brad Munter</i> |
| ● Packing Services<br><i>Rich Meyer</i>   | ● Claims<br><i>Trudy Fingal</i>        |

## Anatomy of a Move



## Customer Service - Nancy Matson



*Once a service request has been received the booking agent takes control of the move. The coordinator manages it from the very first call through to the very last follow up call .*

## **Customer Service - Nancy Matson**

- **Introductory call**
  - Advise the transferee of their Company's selection of us as the van line to handle their move.
  - Introduce self as their move coordinator – single point of contact.
  - Determine any 3<sup>rd</sup> party issues.
  - Explain valuation.

## **Customer Service - Nancy Matson**

- **Introductory call**
  - Go over what to expect on the move.
  - Go over delivery spreads.
  - Question dates (ask if they have any dates in mind. We explain the importance of getting the survey completed.)

## **Customer Service - Nancy Matson**

- Introductory letter:
  - Confirmation of Agents & numbers.
  - Explains roles of origin and destination agents.
  - Outlines what transferees need to do to make move smooth.
  - Sets expectations.
    - ✓ Shuttle
    - ✓ Storage

## **Customer Service - Nancy Matson**

- Survey set up with Origin Agent
  - Results reviewed with transferee.
  - Dates discussed and delivery spreads are reviewed.
- Order Registered when dates are set

## **Customer Service - Nancy Matson**

- Move progress tracked
  - Van assignment
  - Calls made prior to pack day
  - Tracking on pack, load, transit days and delivery days
  - Follow-up five days after delivery to assure satisfaction.
- Advice for transferees in summer.

## **Origin Services - Kathy Nelson**

- The Request
  - Advance notice please
  - Accurate information
- The Survey
  - In home visit
  - Pricing
- Communicate accurate information to booking agent

## **Origin Services - Kathy Nelson**

- The Service
  - Professional + prompt + efficient = a satisfied customer
- What Happens in Summer
  - Supply vs. demand
  - Small shipments
  - Stress levels
  - Communicate, communicate

## **Packing - Rich Meyer**

- Training of packers.
  - Prepare the shipment for safe transport.
  - Protect by wrapping and picking the right container - size, weight, density, efficiency.
  - What items should be packed together.
  - Work with customer to properly identify rooms & contents, items of special concern or high value.

## ***Packing - Rich Meyer***

- Packing Materials
  - Picking the right materials for the job.
  - Screening items not allowed and not recommended.
  - Fragile and less than 1-cubic foot items.
- “Packed by Owner” (PBO) cartons.

## ***Packing - Rich Meyer***

- Preparation for Packing.
  - Tour residence for room layout and develop a game plan - consider loading schedule & convenience for family.
  - Set up a pack station.
- Labeling Cartons.
- Inventory.
- Walk-through before leaving.

## ***Packing - Rich Meyer***

- Advice for all moving times.
  - Make arrangements for children, pets.
  - Set aside an area for yourself.
  - Clearly label and separate items not to be packed.
  - Clearly label items for split shipments (storage, temporary residence, etc.)
  - Discuss your concerns with the pack crew -  
- it's your move.

## ***Packing - Rich Meyer***

- Peak season advice:
  - Patience, flexibility will make your pack job go more smoothly.
  - The more prepared you are, the better we can serve you.
  - Recognize that crews are working extended days, and are sometimes short-handed.
  - Discuss your concerns - it's your move.

## ***Dispatch - Steve Gipson***

- Assigning the move to a driver.
  - ✓ Bill Of Lading received from Customer Service.
  - ✓ Matching customer needs with a driver.
- Planning driver trips.
  - ✓ Geographic location.
  - ✓ Required dates (delivery spreads).
  - ✓ Maximizing trailer capacity.

## ***Dispatch - Steve Gipson***

- What happens in Peak seasons?
  - Planning trips for maximum capacity.
  - Agent pickups.
  - Deadheading a driver.
  - Alternative solutions.

## ***Dispatch - Steve Gipson***

- Advice for moving during peak seasons.
  - Plan moves for the middle of a month.
  - Flexibility at month end.

## ***Owner / Operator - Brad Munter***

- Driver calls
- Preparation for Loading
  - Residence preparation
  - Inventory process
- High Value Items
- Items to travel with the transferee

## **Owner / Operator - Brad Munter**

- Storage
- Temporary Living and Storage delivery.
- Expectations during the realities of Summer.

## **Claims - Trudy Fingal**

- What is the basis of a claim?
  - Paperwork / Documentation
    - ✓ Coverage / Valuation
    - ✓ Filing/claim forms
    - ✓ Time limits for filing
    - ✓ Proof of value
    - ✓ Repairs / salvage
    - ✓ Cash settlements
    - ✓ Good will gestures
    - ✓ Final settlement and release

## **Claims - Trudy Fingal**

- Who is responsible?
  - Inventories / exception sheets / bingo check-off sheets
  - Transferee, packer, driver, or warehouse responsibility

## **Claims - Trudy Fingal**

- How could accounts help in the claims process?
  - Educate transferee's on their responsibility and the need to be available for their move
  - Explain what is and is not covered
    - ✓ Inherent vice/mechanical
    - ✓ Items not covered
    - ✓ Items not to be moved
    - ✓ Burden of proof of value on transferee

# Questions?

