Process overview and AMP customer map
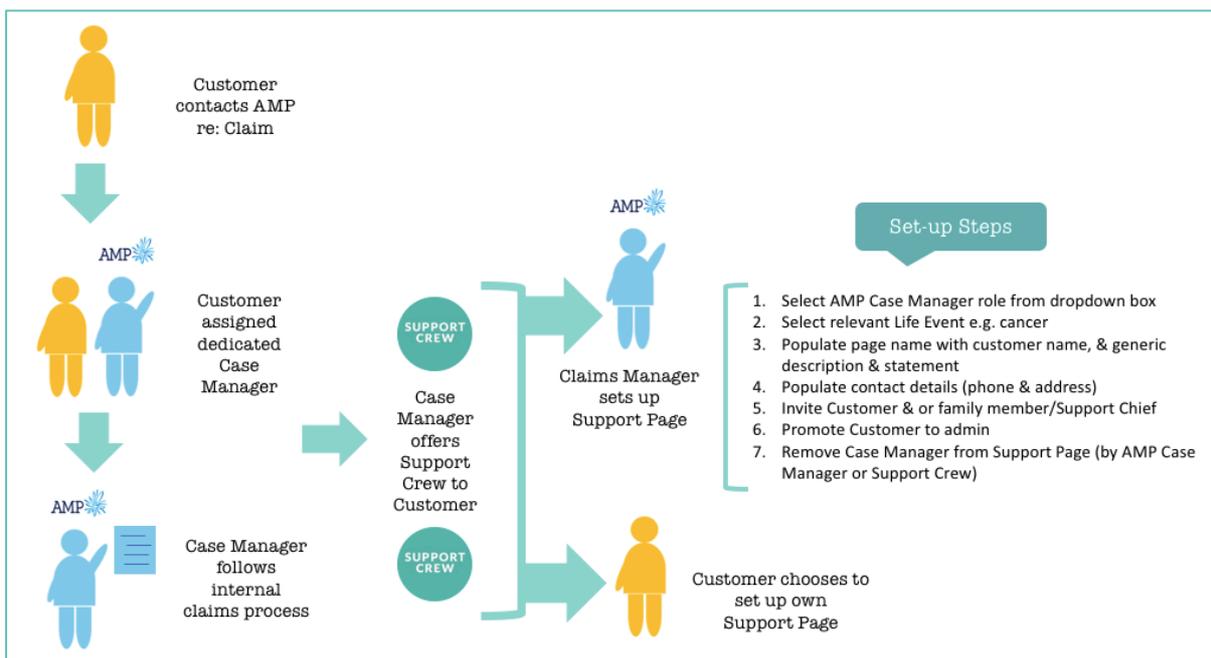
AMP Case Manager Process

Step 1	CM offers and gets permission to set-up a Support Page for customer
Step 2	CM sets-up Support Page for customer
Step 3	CM emails invitation with Support Page link to customer
Step 4	Once customer on Support Page, CM removes themselves from the Page

AMP Customer Process

Step 1	Customer accepts invitation to join Support Page from CM
Step 2	Customer edits Page name, description and adds an image
Step 3	Customer adds some need requests and invites Support Crew

AMP Customer Map

Customer contacts AMP re: Claim

Customer assigned dedicated Case Manager

Case Manager follows internal claims process

Case Manager offers Support Crew to Customer

Claims Manager sets up Support Page

Customer chooses to set up own Support Page

Set-up Steps

1. Select AMP Case Manager role from dropdown box
2. Select relevant Life Event e.g. cancer
3. Populate page name with customer name, & generic description & statement
4. Populate contact details (phone & address)
5. Invite Customer & or family member/Support Chief
6. Promote Customer to admin
7. Remove Case Manager from Support Page (by AMP Case Manager or Support Crew)

Support Page guidelines for AMP Case Manager

Step 1: Offer to set-up a Support Page for AMP customer

When appropriate, the CM will inform customer about Support Crew and either:

1. Offer to set-up a Support Page on their behalf with their permission
2. Guide a customer to set-up their own Support Page and provide more information as per email copy.

Tools available: Suggested script for phone call/verbal & email copy

Step 2: Set-up Support Page for AMP Customer as per option 1 above

Tools available: Guidelines below, video and demo clips on
http://www.supportcrew.co.nz/amp-crew/?preview=true (needs to be approved)

Steps for setting up a Support Page

1. Select AMP Case Manager role from dropdown box
2. Select relevant Life Event e.g. cancer
3. Populate page name with customer name, & generic description & statement

   Tips:

   - **Page name** can be the customer's full name
   - **Page statement** can be the customer's first name followed by Support Page e.g. Jack's Support Page
   - **Page description** can be generic e.g. Making it easy to co-ordinate offers of help and support during this time.

4. Populate contact details (phone, email & address)

   Select hide contact details for privacy and customer can remove that if they choose to.

Tools available: Product videos/demo clips and demo page to play

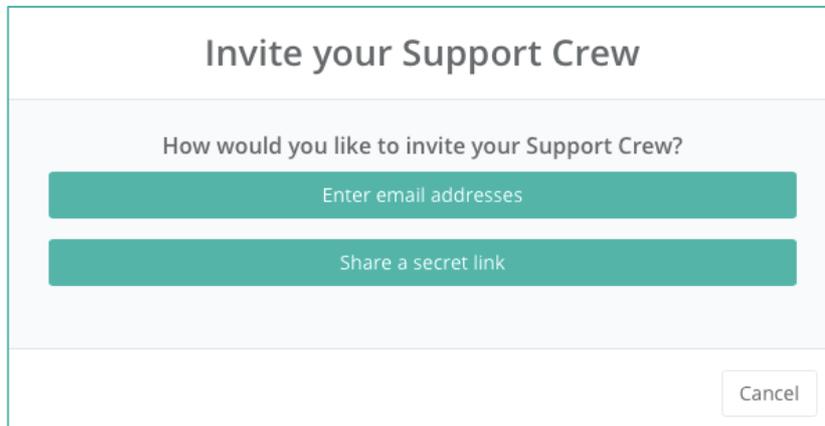**Step 3: Email invitation to customer and or family member/Support Chief**

The easiest way to do this is to share and embed the link of a customer's Support Page into your email copy.

This means that you can personalise your email content and that the email comes directly from you. Steps as follows:
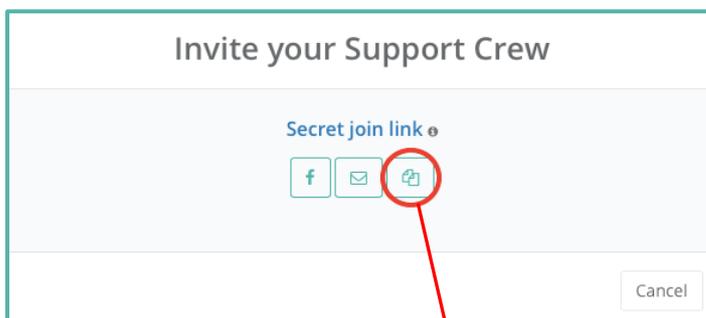
1. Go to 'Invite Support Crew'   **&+ Invite Support Crew**

2. Select 'Share secret link'

Invite your Support Crew

How would you like to invite your Support Crew?

Enter email addresses

Share a secret link

Cancel

3. Select 'Copy to clipboard' and then 'paste' link as hyperlink under 'What happens next?' (Email option 1, step 1, pg. 2). The email copy can then be personalised and sent from AMP CM email address.

Invite your Support Crew

Secret join link ⓘ

Cancel

What happens next?

Your Support Page is now set this up with the basics. Follow these simple steps to start making it work for you:

1. Accept the invitation to your **Support Page here** (if you haven't already). *[insert link in 'here' by copying secret link – instructions on pg. 6 below]*.

Tools available: Email copy and product videos/demo clips

Step 4: Promote customer to Admin on their Support Page and remove CM from Page

Once the customer has accepted the invitation and is on the page, you can promote them to admin. That way they can manage and edit the page accordingly.
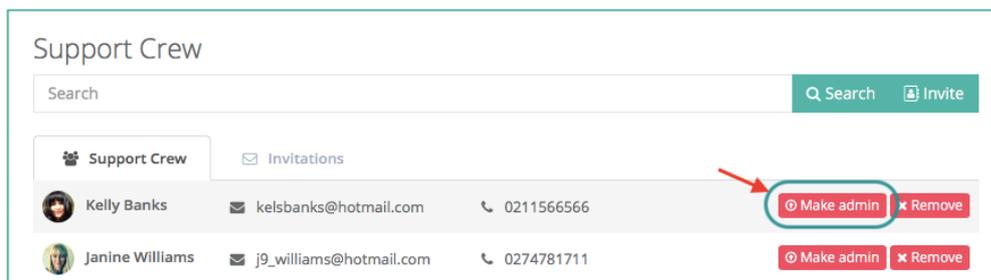
Lastly and most importantly, the Case Manager needs to be removed from the Support Page (can be done by Support Crew or AMP Case Manager). This step is important to ensure customer privacy and confidentiality.