

CRM Welfare Flag

Flag raised by
internal colleague
against a venue.

CRM Welfare Flag: Ways of Working

- 1** Flag applied in CRM for non field sales e.g. KAM/NAM, escalate by calling Line Manager.
- 2** Field Sales Manager/Line Manager, NAM and Controller align on severity category following a discussion of the rationale.
- 3** Field Sales Manager/Line Manager briefs Drinks Dispense Regional Operations Manager and KAM/NAM for the incumbent route-to-market on the severity and future way of working.
- 4** NAM/Controller then briefs the route-to-market.
- 5** Should there be a future change of management/ownership at the outlet, the flag could potentially be removed.
- 6** CTL process to begin. Controller/NAM to hold follow-up with impacted colleague to check on welfare, and any actions taken where applicable.




CRM Welfare Flag

Flag raised by
Route to Market to
internal team.

CRM Welfare Flag: Ways of Working

- 1** Internal colleague receives communication from a wholesaler, route to market, or customer regarding an outlet.
- 2** Controller, NAM or Field Sales Manager arranges a meeting or call with the Route To Market to understand their concerns fully.
- 3** Following this information capturing exercise, the Field Sales Manager, NAM and Controller align on severity category following a discussion of the rationale and apply a flag.
- 4** The aligned-WAM /BDM and Drinks Dispense Regional Operations Manager are briefed on the flag having been applied and the future way of working with the account
- 5** The NAM then reverts to the wholesaler/route to market to communicate our future way of working with the account.

CRM Welfare Flag: Severity Guide

| SEVERITY | EXAMPLE BEHAVIOUR DESCRIPTION | WAY OF WORKING |
|---|---|---|
|  <p>LOW</p> | <ul style="list-style-type: none"> ➤ Customer is perceived as being patronizing, making unreasonable requests, is disingenuous, or is generally unapproachable. This could be expressed by an internal colleague or wholesale partner. | <ul style="list-style-type: none"> ➤ Field Sales Manager and impacted internal colleague align on whether accompanied visits are required in future, or a flag just needs to be applied. |
|  <p>MED</p> | <ul style="list-style-type: none"> ➤ Customer raises their voice, swears, or has a brash rude tone when interacting. Either to an internal colleague or route to market. | <ul style="list-style-type: none"> ➤ Field Sales Manager has a call or meeting with the account to communicate the behaviour is unacceptable. ➤ Following customer apology, “low severity” flag is applied. ➤ If there is no customer apology, Field Sales Manager becomes sole-contact for the account over phone and email. ➤ All brands dispense visits are not completed alone. |
|  <p>HIGH</p> | <ul style="list-style-type: none"> ➤ Customer makes an inappropriate comment which is discriminatory in any way. This includes but is not limited to, being sexist, ageist, homophobic, and racist. This could be directed at a colleague or witnessed by a colleague. ➤ Customer takes an inappropriate action. This includes, but is not limited to, sexual advances, physical assault, stalking. This could be experienced by an internal colleague or witnessed by a colleague. | <ul style="list-style-type: none"> ➤ Impacted colleague, Field Sales Manager and Controller schedule a meeting with the People team to discuss the incident and receive guidance. ➤ If the account is in a contract, the Controller aligns with Legal on whether it can be terminated, and communication plan. ➤ If contract cannot be terminated then for the remaining duration of the agreement the Field Sales Manager becomes sole-contact for the account over phone and email only, and no drinks dispense visits are completed alone. ➤ If the account is not in a contract, the Controller or NAM aligns with legal and dispense on the removal of all equipment, and how to communicate this. |