



DO



DON'T



Call clients weekly at the scheduled time. Agree upon this time with the client.



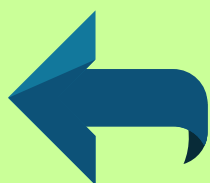
Leave calls unscheduled and uncertain. Try to keep the schedule regular and at a good time for both of you.



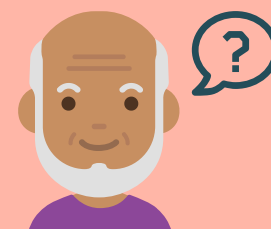
Submit a survey immediately after each call while you remember how long you spoke with the client. This way, Eras is able to report info accurately to stakeholders.



Wait to submit a survey. Letting Eras know how the call went as soon as possible helps us stay compliant and up to date.



Client mentions they need something? Refer them to Eras during the call and make a note in your survey of what you referred them for.



Try to problem-solve for the client. Clients often need more help than you are able to provide. Refer them directly to Eras so we can assist as needed.



Can't make calls anymore? Send us an email 2 weeks prior to ending calls.



Unexpectedly stop making calls. Clients rely on this service and are expecting your call. Let Eras know as soon as possible if you need to step away from calling.



ENJOY!



Clients have a lifetime of stories and knowledge. Learn from each other and build a connection!



Mention upsetting or negative subjects. Stay away from controversial topics like COVID-19, politics, personal problems, and personal beliefs. Stay positive and open to conversation.