Telemarketing Leads and Follow-ups

INTRODUCTION

A dynamic companion to the CU*BASE Cross Sales Tracking system, the **Telemarketing Leads & Follow-ups** system creates a powerful tool for following up on member contacts and *closing* that sale.

Similar to the Collections review system, the Telemarketing tool lists all outstanding leads to be handled so that they can be steadily worked by a telemarketer, member service representative, or any credit union staff member. Actually designed as specially-tagged ticklers, the system is easy to use and keeps a running "progress report" of member contacts. In addition, telemarketing ticklers are linked to specific Cross Sales tasks, so that final results on the follow-up can be tracked along with other cross-selling activity.

The link between Telemarketing Leads and Cross Sales Tasks is strong. Simply put:

⇒ Telemarketing ticklers provide the way to easily follow-up on many different issues—direct mail follow-up, answering questions presented to a teller, checking out a lead, etc. Think of them as a "reminder" of what needs to be done.

⇒ The CU*BASE Cross Sales system is used to keep track the status of the follow-up (contacted, processed, not interested, etc.)—a "record" of events that have taken place—as well as providing a sales "prompt" to employees and a way to reward your staff for their cross selling efforts.

Using TLF as a Member "Voice Mail" System

For years CU*BASE has had a tickler system that records member comments and issues and can prompt employees through the "Member Follow-ups" (Tickler) system to take action. That action may be anything

from following up with a vendor about missing share drafts, talking with the Board about a member suggestion, or even returning a phone call.

The Telemarketing Leads and Follow-ups system focuses employee action on making sure they call the member by providing a tickler that is staged with the member's home and work phone numbers. Your credit union may even decide that all member return phone calls should go through the Telemarketing system and not the generic tickler system.

CONTENTS

SAMPLE SCENARIOS FOR USING THE TELEMARKETING SYSTEM

CROSS SALES MEMBER SERVICE LEADS

MSR Mary Smith is talking with a member about a credit union home equity loan on her cross sales task list. Mary does a very good job of explaining all of the features and benefits of the credit union's HELOC program, but to her surprise, the member shoots right back one or two things about a competitor's home equity program that seem superior to the credit union's offering.

Mary compliments the member on his suggestions for the credit union program, and tells the member that she will have the lending manager call him as quickly as possible to discuss his suggestions. Mary creates a Telemarketing tickler to record the member's comments and her problems in selling this product and to prompt Jim Taylor, the lending manager, to call the member.

Each day as Jim checks the Telemarketing system, he can see all of the new leads and return the calls, marking them as "worked" after each member has been contacted. Because the lead is linked to a cross sales task, Jim can also mark the status of the task using the cross sales system to keep other employees updated.

TELEMARKETING FOLLOW-UP TO DIRECT MAIL CAMPAIGNS

As a selective insert in their March statements, a credit union sends out 1,500 flyers to members who are identified as potential new checking account holders. It is important that all MSRs and other staff understand that these members were contacted and what key points and offers were made in the flyer. In addition, it is decided that each of these 1,500 members should receive a follow-up phone call to stress the credit union's interest in getting their checking account business.

The marketing employee generates a batch of Telemarketing tickler entries using the same database file. A tickler then appears on each member's account and can be viewed by tellers and other member service personnel to explain the marketing campaign. This allows credit union staff to answer a member's questions intelligently and without having to pass all member inquiries on to the marketing department. In addition, all of the ticklers can be viewed as a group using the Telemarketing system, so that individual follow-up phone calls can be tracked, recorded, and verified as part of the comprehensive marketing campaign.

When the ticklers are created, they are also linked to a "checking account" sales task in the credit union's Cross Sales tracking system. If the member comes in to sign up for the checking account flyer prior to being contacted by phone, the MSR will mark the task as completed and to track who handled the account sale for the credit union's employee incentive program.

Remember that with the **Member Connect** feature (available from the MNMRKT menu) you can use this same database file to reinforce your message through multiple channels in a comprehensive marketing campaign:

⇒ Send email messages
⇒ Send messages via CU*@HOME
⇒ Print member mailing labels
⇒ Produce a mailing list for a third-party marketing resource
⇒ Set up selective statement inserts
⇒ Create telemarketing ticklers for follow-up

CONFIGURING TICKLERS FOR TELEMARKETING LEADS

The first step in using the Telemarketing system is to define a tickler type to be flagged to appear on the Telemarketing Leads & Follow-ups screen. Ticklers created with this type code will behave exactly like other ticklers except that they will also appear in the Telemarketing list for quick and easy follow-up by a credit union employee. This flag can be turned on for as many of your tickler types as desired.

MNTKLR #5 "TICKLER Define Types"
Screen 1
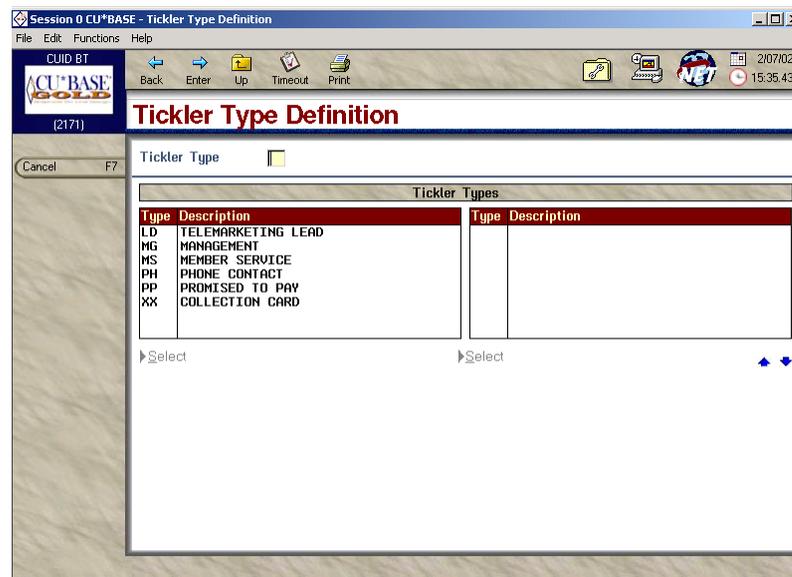
Enter a two-character code and use Enter to proceed to the second screen.

In most cases it is best to define new tickler types used specifically for follow-up via the Telemarketing system. For example, you might create a generic "Telemarketing Leads" tickler type, and another "Direct Mail Follow-up" type specifically for use with marketing promotional campaigns.

> *If you choose to modify one of your existing tickler types, keep in mind that all old ticklers created using that type will immediately begin appearing in the Telemarketing system, even if they have already been resolved. In addition, the old ticklers will not be coded with a cross sales task or status.*

Screen 2

If ticklers of this type should be included in the list of Telemarketing Leads, choose Yes in the final field. If this setting is Yes, you must also set the *Allow Update* field to Yes so that the tickler text can be updated with comments as follow-up is done on the lead.

> *A change to this setting will <u>not</u> affect existing ticklers of this type.*

CREATING TELEMARKETING FOLLOW-UP TICKLERS

Telemarketing follow-up ticklers are created using the same tickler creation system as other ticklers. The Tickler Entry feature can be accessed via **F20=Tickler Entry** on the Account Inquiry screen (use account suffix -000), or by using option **9=Create Tickler** on the Cross Sales Task List screen.

> *For complete information about creating ticklers, refer to the Tickler Processing (MNTKLR) chapter in CU*BASE GOLD On-Line Help.*

Tickler Entry Screen 1 (Example)

Telemarketing ticklers should be assigned to the base share account (-000).

Use a tickler type that is configured to appear in the Tele-marketing system. (See Page 3). Click the help button ◄ to see a list of your credit union's configured codes.

Tickler Entry Screen 2 (Example)

Tickler Entry Screen 3 (Example)

Use these fields to link this follow-up to an existing cross sales task. (Click the help button ◄ to see a list of configured needs groups and/or tasks.) These fields will appear only when using a tickler type set up to appear in the Telemarketing system (see Page 3).

A follow-up is required for all Telemarketing ticklers (the follow-up option will be set to Yes automatically and cannot be changed for these tickler types). Simply enter the follow-up date, Employee ID and contact name as usual. In addition, for these tickler types you must also specify the Cross Sales Need Group and Task number associated with this task.

> *Because of the strong link between the Telemarketing system and CU*BASE Cross Sales Tracking, these fields are required. If you are using the Telemarketing system to follow up on direct mail marketing campaigns, create a special "Direct Mail Campaigns" Need Group and a separate Task for each promotional campaign. See the "Using the CU*BASE Cross Selling Tool" for details on setting up Cross Sales Need Groups and Tasks.*

FOLLOWING UP ON TELEMARKETING LEADS

Whether your credit union has a full-blown telemarketing team or not, the CU*BASE Telemarketing Leads and Follow-ups system is designed to make it easy and quick to check on outstanding phone calls that are needed to handle member inquiries or follow-up on marketing campaigns. All employees should be in the habit of checking this system just as they check WMail and their regular Member Follow-ups (ticklers) every day.

MNTKLR #14 "Telemarketing Leads & Followups"
- or -
MNMAST #19 "Work with Member Phone Calls"
- or -
Member Inquiry, then F15=Sales Tools, then select "Telemarketing Leads and Follow-ups"
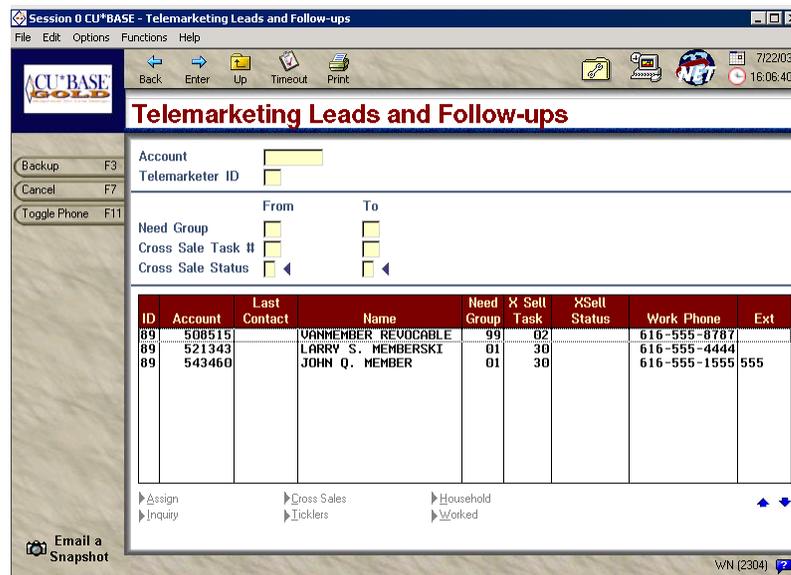
This screen displays all member ticklers that have been flagged to be included in the Telemarketing Leads system. Use the search fields at the top of the screen to locate a specific member account, view all leads flagged for a specific Telemarketer (Employee) ID, or to display only ticklers that fall within a certain range of Need Groups, Task numbers, or Cross Sales status. Enter the desired search parameters and use Enter to reorganize the list. To return to the original display, clear all search fields and use Enter to refresh.

> *For example, if your credit union has multiple employees who handle follow-ups on these ticklers, you may choose to view only those that have been assigned to you. Or you may wish to see all ticklers associated with a cross sales task with a status of "Pending."*

The **F11-Toggle Phone** feature will change the screen to display either the member's *Home Phone* or *Work Phone* and *Extension* in the far right

columns. Therefore, if no work phone number is displayed, use the toggle key to see a home phone instead.

Select any record in the list and use one of the following options to work the follow-up item. Use Enter after entering a code to refresh the screen. Use F7-Cancel when done to exit the Telemarketing system.

Option Codes

Option	*Description*
Assign	Use this code to change the Telemarketer (Employee) ID assigned to a follow-up item. A window will appear; enter the new ID and use Enter to reassign the item.
Cross Sales	Use this code to display the Cross Sales Tracking screen and update the status of cross sales tasks associated with this follow-up contact. This option be used to record the status of the follow-up as it relates to the completion of the cross sales task. For example, a telemarketer contacts a member about a recently-mailed credit card offer, and the member is interested and begins the normal application process. The telemarketing rep. would mark the associated cross sales task with "1" for Pending, and also mark the task as "worked" in the Telemarketing list. As additional progress is made on the credit card application, the Cross Sales task list would be updated and the tickler could be marked as completed once the credit card account has been approved. See the "Using the CU*BASE Cross Selling Tool" for details on completing the Cross Sales Task screen.
Household	Use this code to display the Household Database maintenance screens, to update a member's household information.
Inquiry	Use this code to display Account Inquiry for this member. NOTE: This option will only work when the Telemarketing screen is accessed from a menu, not from the Sales Tool window within Inquiry, Phone or Teller software.
Ticklers	Use this code to display the "Tickler File Review" screen to work with all outstanding ticklers for this member. This will allow you to update this telemarketing lead with additional text, or view other ticklers flagged for follow-up for this member.
Worked	Use this code to mark this lead as "worked." The current month and day will be filled into the *Last Contact* column. The item will remain on the list and can be worked again as additional contact is made.

GENERATING TELEMARKETING
TICKLERS FROM A DATABASE FILE

One of the most powerful features of the CU*BASE Telemarketing Leads and Follow-ups system is that it can be used as part of a comprehensive marketing or promotional campaign, to track and follow up with member responses. In order to accomplish this, CU*BASE can automatically generate a batch of telemarketing ticklers using a list of memberships in a database file. This database file can be created from the same database used to define the mailing list for the original promotion.

For example, when using the CU*BASE Selective Statement Inserts feature to include marketing pieces in select member statement envelopes, you must create a database file that contains all of the account numbers that should receive the special insert. The same file can be used by the auto-generation feature to generate a telemarketing tickler entry for each member on the insert list.

STEP 1: PREPARE THE DATABASE FILE

> IMPORTANT: These instructions assume that you are thoroughly comfortable with creating and modifying Queries. See the "ReportBuilder (MNQURY)" chapter in CU*BASE GOLD On-Line Help for complete information.

1. Start by creating a Query which uses all of the CU*BASE files necessary for selecting the desired members.

2. Using the "Select and sequence fields" option, choose the **ACCTBS** (Account Base) field. Other fields can be included, but they must come *after* the account base field.
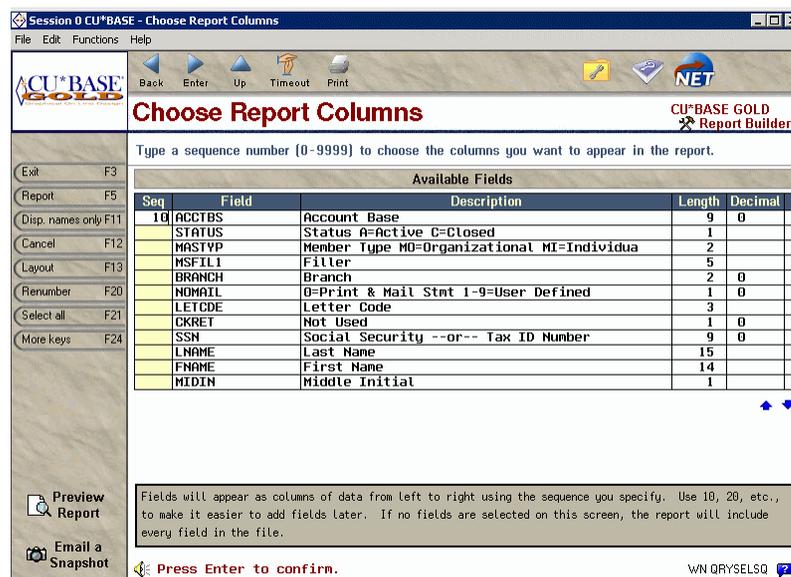
3. Use the "Select records" option to set up any needed selection criteria to choose the appropriate members.

4. To determine the number of accounts selected, use **F5=Report** to view the Query results. In the *Position to line* field, type "B" and use Enter to see the last item. The line number indicates the total number of records selected. This count should be used as verification when generating the telemarketing ticklers.

5. Use the "Select output type and output form" option to display the following screen:
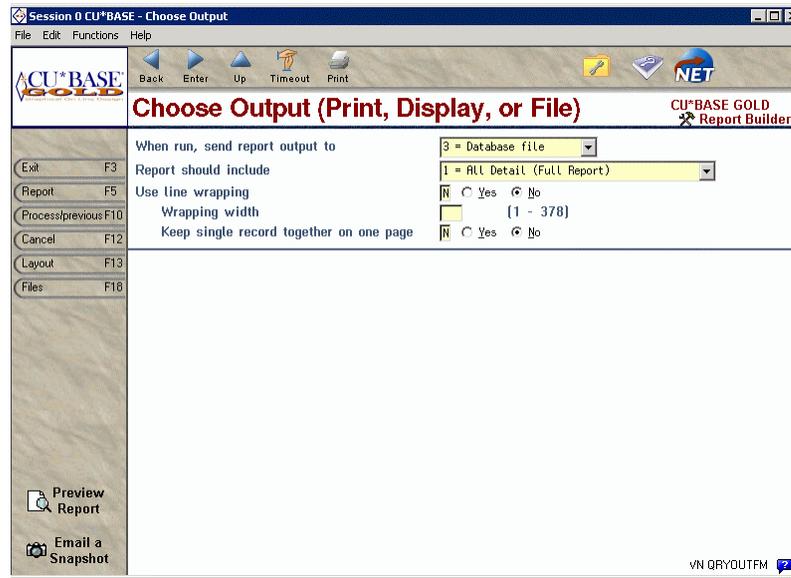
6. In the *Output type* field, enter 3 for Database file. Use Enter to proceed to the next screen.
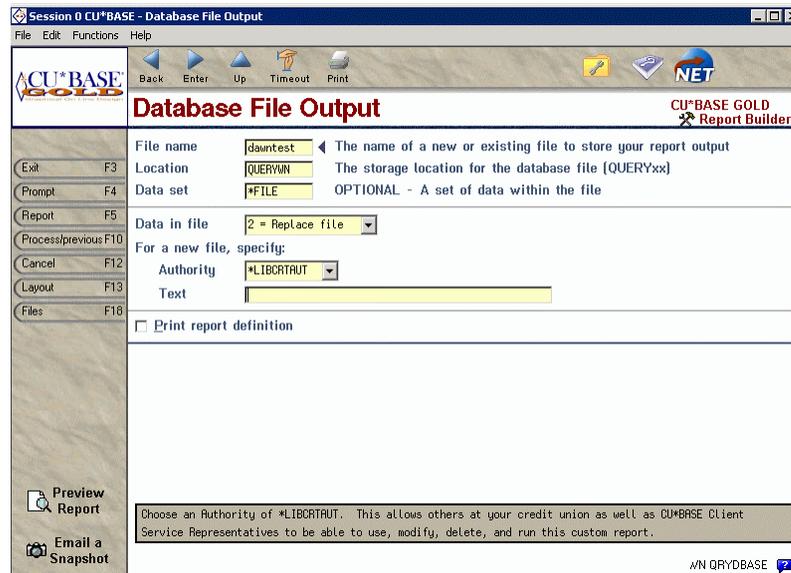
7. In the *File* field, enter the database file name.

8. In the *Library* field, enter the location for the database file: **QUERY**xx. (For *xx* substitute your credit union's 2-character ID.)

9. In the *Data in file* field, choose **Replace file** (this will ensure that you can run this same Query again or another Query using this same file name in the future, without conflict).

10. Use Enter to record the changes.

11. Save and <u>run</u> the Query to generate the database file.

STEP 2: GENERATE TELEMARKETING TICKLERS

Once the database file has been created, you are now ready to generate a telemarketing tickler for every member in the file.

MNTKLR #15 "Generate Leads from File"

Use this screen to specify how the new ticklers should be created. Remember that all ticklers will be attached to the base share (-000) account suffix automatically. Complete all fields and use Enter to generate the ticklers.

When the generation process is complete, a message will appear at the bottom of the screen showing how many tickler records were created. Be sure to verify this number against the total number of records from the Query you created earlier. (Remember that a minor discrepancy might exist if any memberships were closed between the time the database was created and ticklers were generated.)

Field Descriptions

Field Name	Description
Field Name	*Description*
Use Accounts From Database File Name	Enter the database file name as stored in your QUERYxx library. See Page 11 for more information.
Create as Tickler Type	Enter the Tickler Type to be created. This type must be configured to display in the Telemarketing Leads and Follow-ups system. See Page 5 for details.
Tickler Key Word	Enter the key word or phrase to be used when creating the tickler. This will appear in various tickler inquiry screens and can also be used for subsequent Queries of your tickler

Field Name	Description
	files.
	For example, if these ticklers are to be used as a follow-up to a direct mail campaign, enter a phrase that describes the mailing.
Tickler Follow-up Date	Enter the follow-up date to be assigned to each tickler. For example, if a direct mailing was sent with your March quarterly statements, you may wish to follow up starting sometime in mid-April after statements have been received.
Tickler Text	Enter up to five lines of text for the tickler itself.
	This is the best way to provide a "script" for the member service representatives that will be following up on the tickler. Include information such as what mailing was sent and when, where a sample can be found, and the telemarketer should ask for during the member contact.
Assign Telemarketer ID	Enter the Employee ID that should be assigned to follow-up with these ticklers. Remember that these ticklers will not only appear in the Telemarketing Leads and Follow-ups screen, but also within that employee's normal member follow-up ticklers.
	NOTE: After the ticklers have been created, you may wish to use the Telemarketing Leads and Follow-ups screen to reassign some of the ticklers to different employees. See Page 9 for details.
Assign Cross Sales Need Group Corporation Assign Cross Sales Task Number	Use these fields to "link" these ticklers to a task on your Cross Sales Task List. Enter the Need Group, Corporation and Task number that will be used to track the status of this tickler. (Click the help button ◀ to see a list of your credit union's configured codes.)
	For example, if you are generating ticklers as a way to follow up on a direct mail or statement insert campaign, you would also create a cross sales task such as "Checking Acct Promo follow-up" and assign that task's need group and task number to these ticklers. As the telemarketer follows up with the member, the Cross Sales system would be used to track the member's response.
	See the "Using the CU*BASE Cross Selling Tool" booklet for more information.