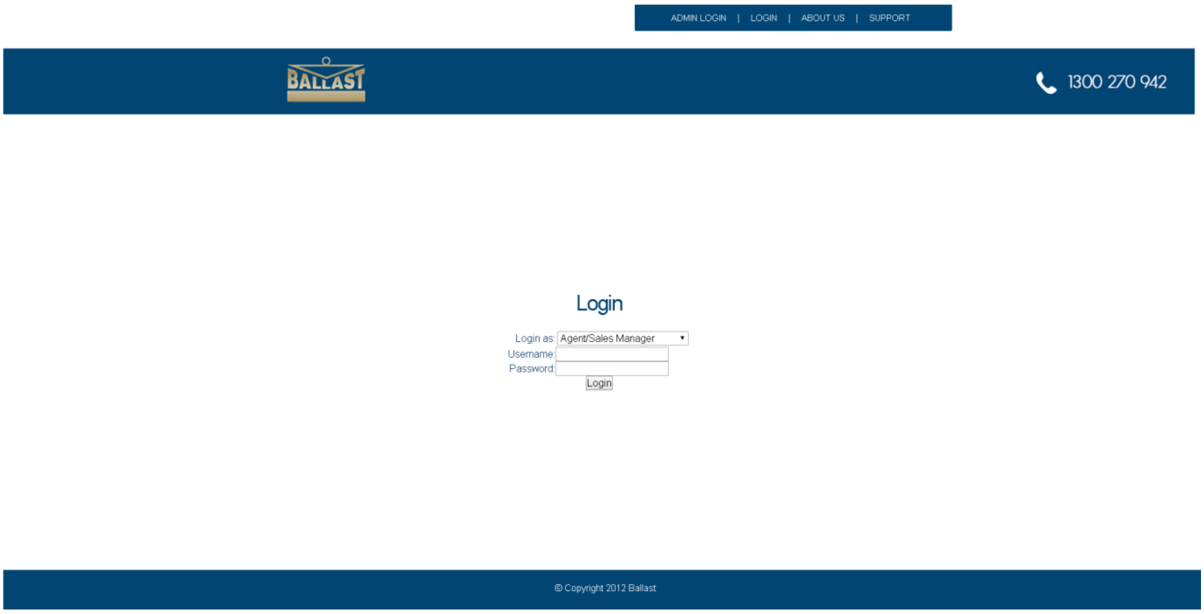
CustomerConnect User Guide

- Agent/Sales Manager -

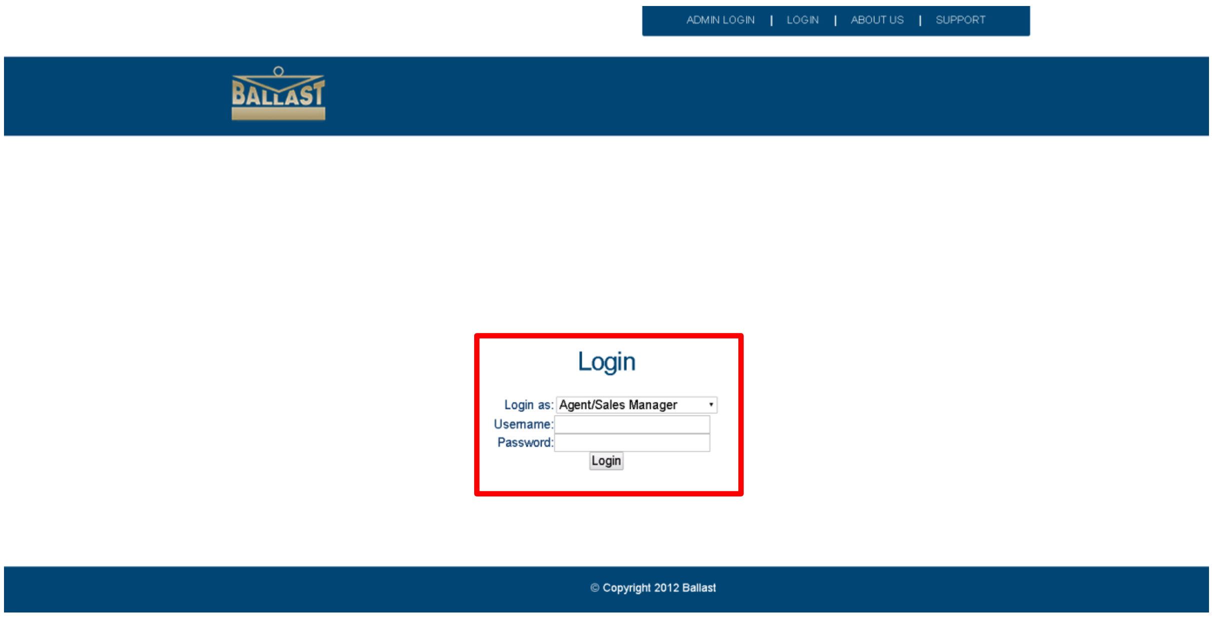
BSA 0914 v1

How to Log in

Go to http://www.ballastcustomerconnect.com.au/agentlogin.php

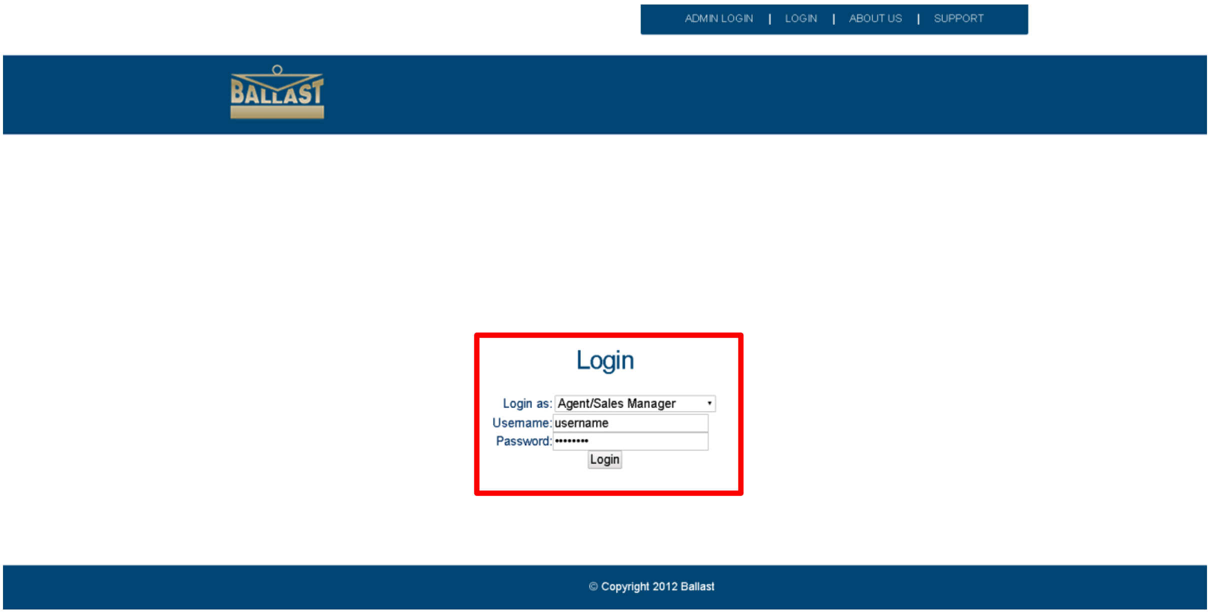


Select *'Agent/Sales Manager'* from the *'Login as'* drop-down list.



Enter your Username and Password

Login details are sent via email from the system when the Login is created



For any issues with logging in or login details please email
strategicalliances@ballast.com.au

Receiving a Lead

Emails are sent to agents upon being assigned a new lead.

The email contains details on the client and nature of the referral as well as Fast Feedback links that the agent can use to update the lead directly from the email.

Hi Agent,

A new lead has been assigned to you. Please contact the client within the next 24 hours and update CustomerConnect.

Lead Name: Susan Jones
Lead Entity Name:
Lead Phone Number: 0401 748 145
Lead Email: sjones@email.com
Lead Source: Wealth Future
Lead Product: Investments
Notes:
Call Date:
Call Time:
State: NSW
References:
View Details: http://ballastcustomerconnect.com.au/agentleads_details.php?id=3856

Fast Feedbacks:
Application Taken: click here
Appointment Conducted: click here
Appointment Set: click here
Called Client - No answer: click here
Called Client - Successful: click here
Called Client - Voicemail: click here
Documents Drafted: click here
Documents given to client: click here
Email Sent: click here
Fil e Closed: click here
File Opened: click here
Likely to Proceed: click here
Not Proceeding: click here
PENDING - Client on Hold: click here
Referral Acknowledge d : click here
Research in progress: click here
Sale Successful: click here
Unlikely to Proceed: click here

Regards,
Ballast Strategic Alliances

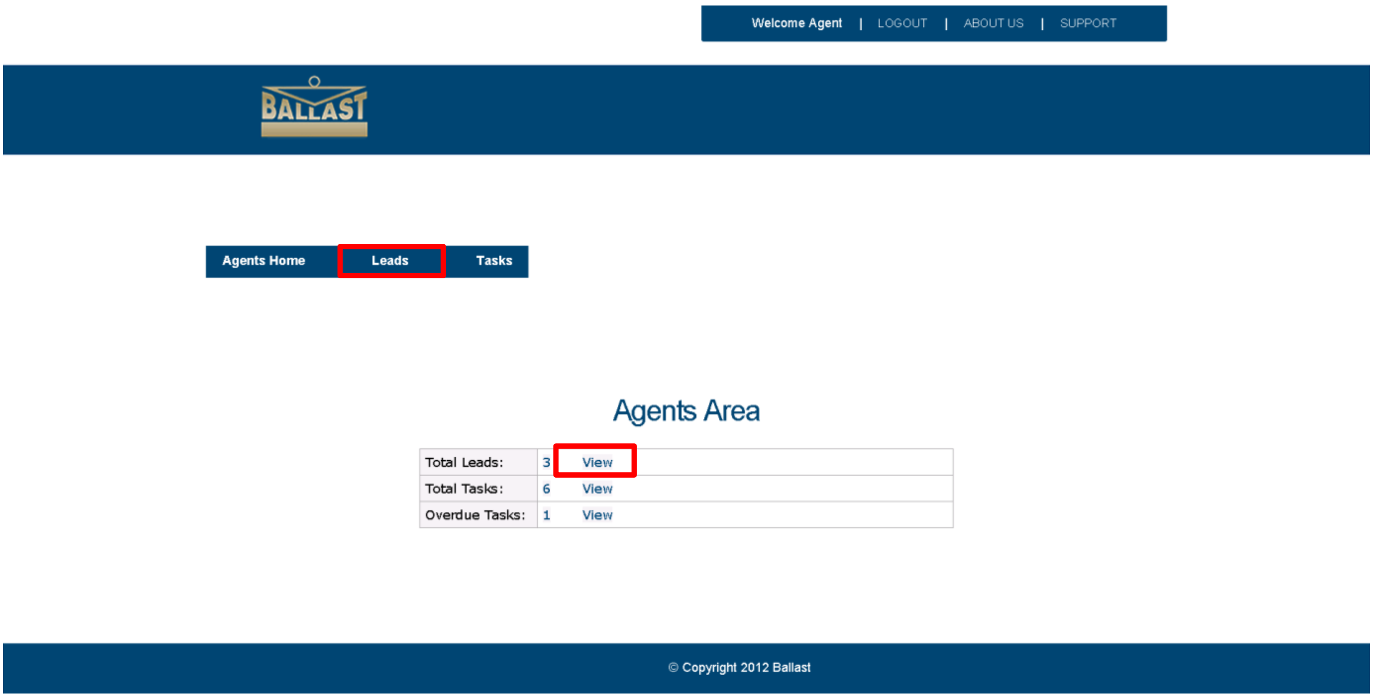
How to Update a lead

Agents should consistently update a lead as it progresses and actions occur.

Updates can be provided by either clicking the Fast Feedback links included in new lead emails or by logging into CustomerConnect.

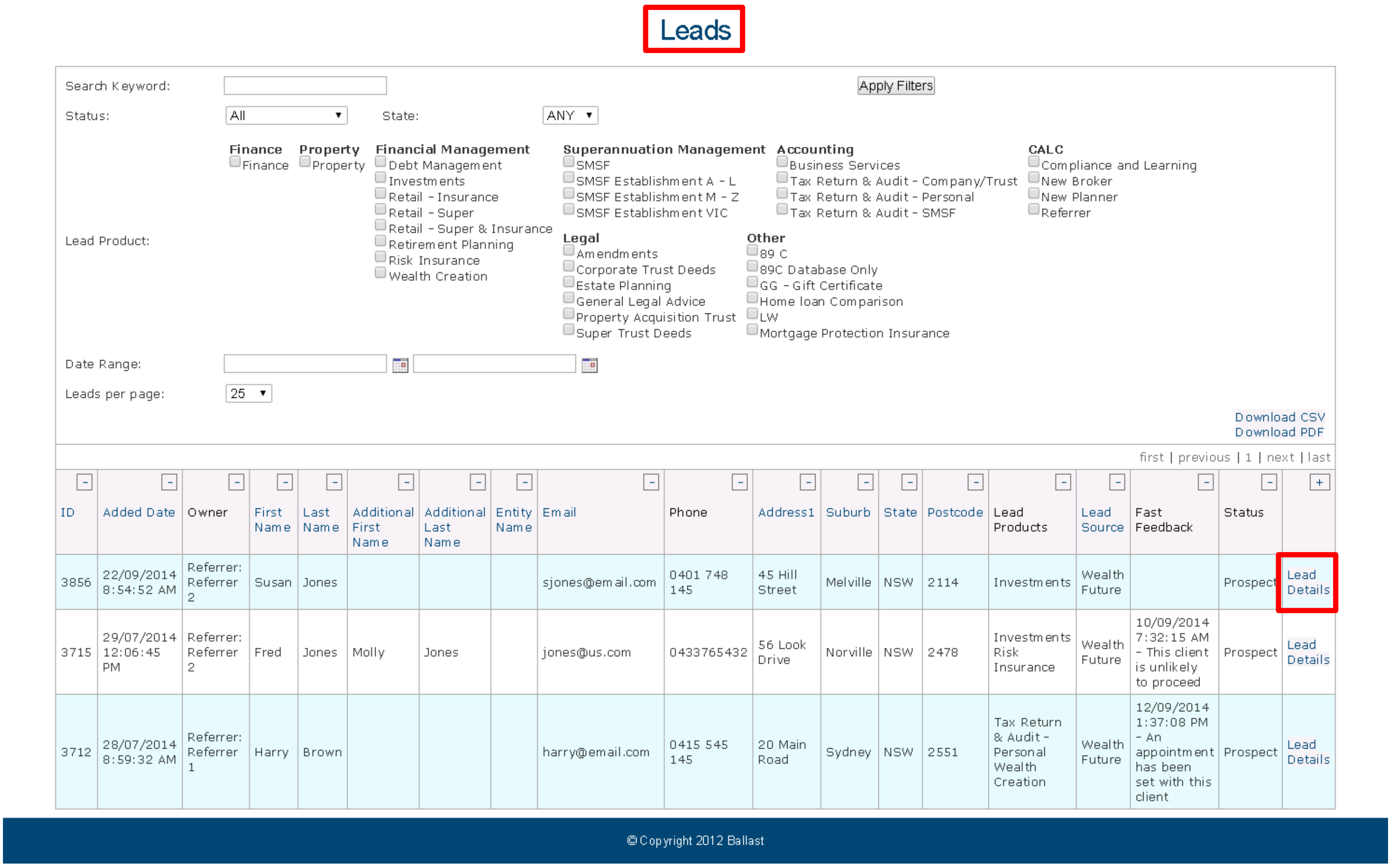
Fast Feedbacks can be used to provide a brief comment on what actions have occurred. For more detailed updates log in to CustomerConnect.

When logged in click on the *'Leads'* menu item or the *'View'* link from the *'Agents Area'* to view a summary of assigned leads.



The *'Leads'* screen displays all the leads assigned to an agent.

From the *'Leads'* screen click on the *'Lead Details'* links to view in more detail and update a specific lead.



ID	Added Date	Owner	First Name	Last Name	Additional First Name	Additional Last Name	Entity Name	Email	Phone	Address1	Suburb	State	Postcode	Lead Products	Lead Source	Fast Feedback	Status	
3856	22/09/2014 8:54:52 AM	Referrer: Referrer 2	Susan	Jones				sjones@email.com	0401 748 145	45 Hill Street	Melville	NSW	2114	Investments	Wealth Future		Prospect	Lead Details
3715	29/07/2014 12:06:45 PM	Referrer: Referrer 2	Fred	Jones	Molly	Jones		jones@us.com	0433765432	56 Look Drive	Norville	NSW	2478	Investments Risk Insurance	Wealth Future	10/09/2014 7:32:15 AM - This client is unlikely to proceed	Prospect	Lead Details
3712	28/07/2014 8:59:32 AM	Referrer: Referrer 1	Harry	Brown				harry@email.com	0415 545 145	20 Main Road	Sydney	NSW	2551	Tax Return & Audit - Personal Wealth Creation	Wealth Future	12/09/2014 1:37:08 PM - An appointment has been set with this client	Prospect	Lead Details

Lead Details

The *'Lead Details'* area contains 5 tabs

- Contact Details
- Tasks
- Notes
- Fast Feedback
- Attachments

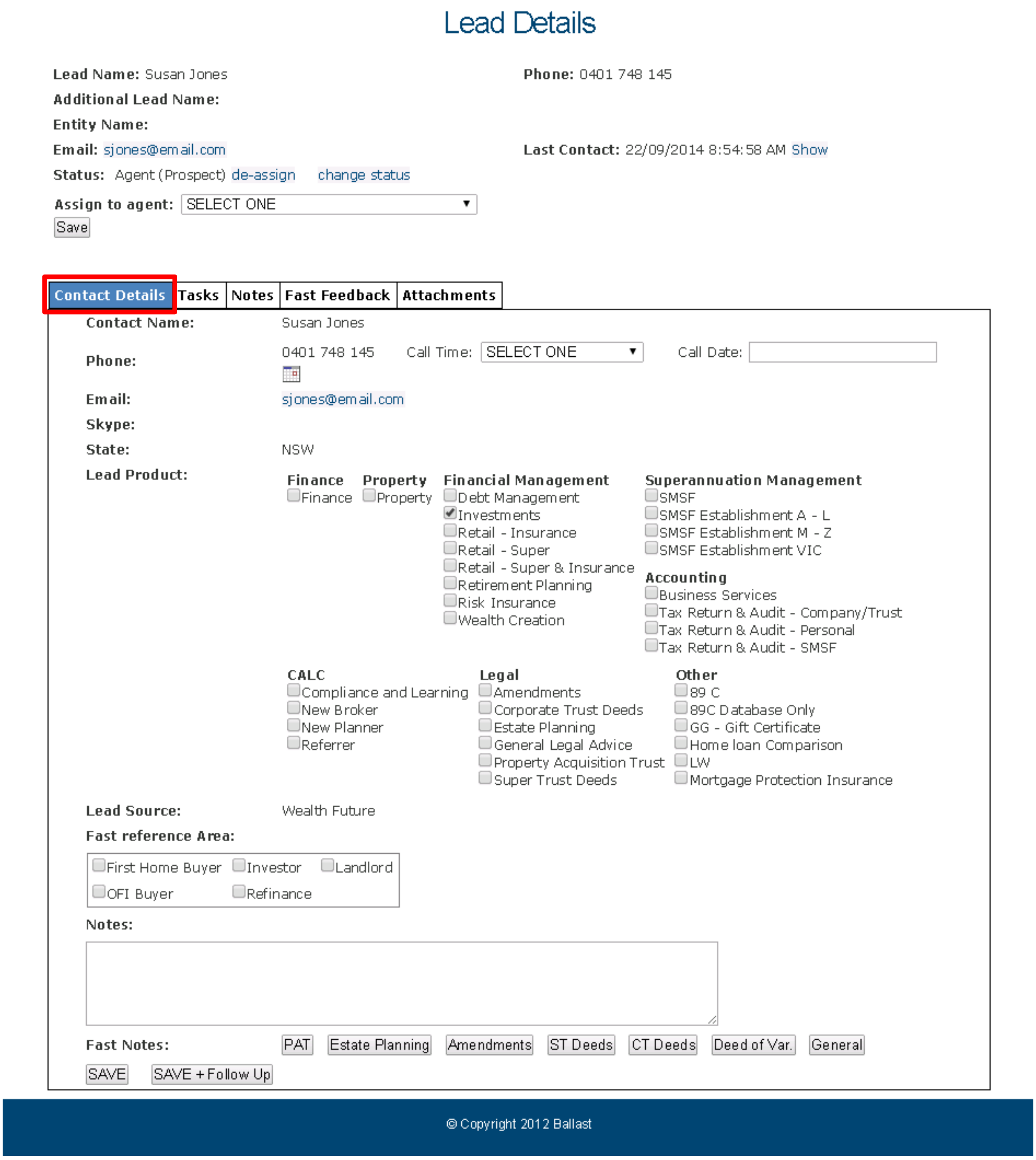
When agents initially receive a lead they should check the tabs for information that can assist them in servicing the client.

They can then use the functions within each tab to update the lead.

Contact Details

The *'Contact Details'* tab contains details on the client and the nature of the lead.

Notes are also added from this tab.



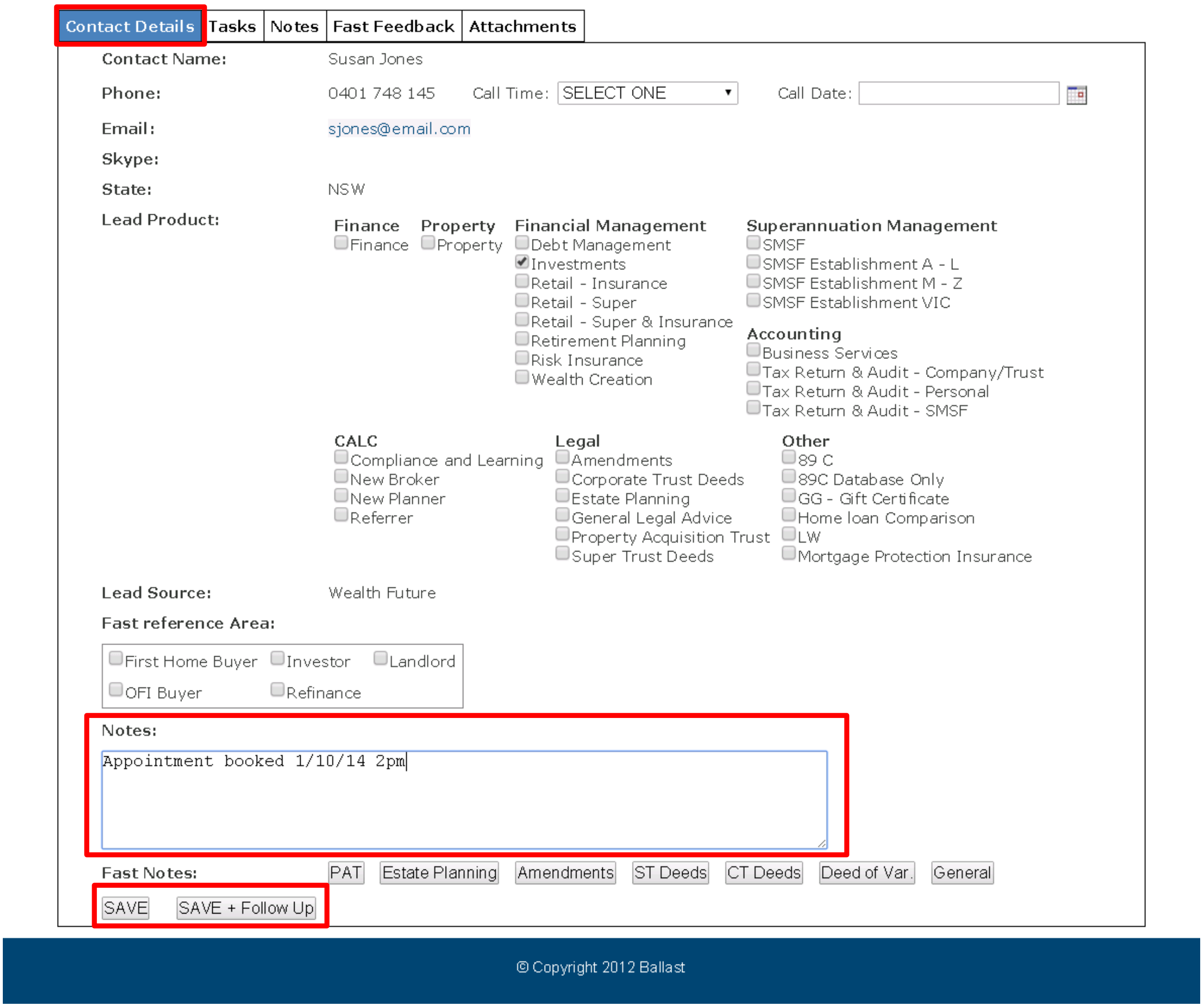
How to add a note

Agents can add notes in order to provide further, more detailed information on the progress of a lead.

To add a note enter the required text in the box provided.

Click *'Save'* to add the note or *'Save + Follow Up'* to add the note plus set an email reminder or send the note to others connected to the lead.

Added notes can be viewed in the *'Notes'* tab.



How to add a note plus set an email reminder or send the note

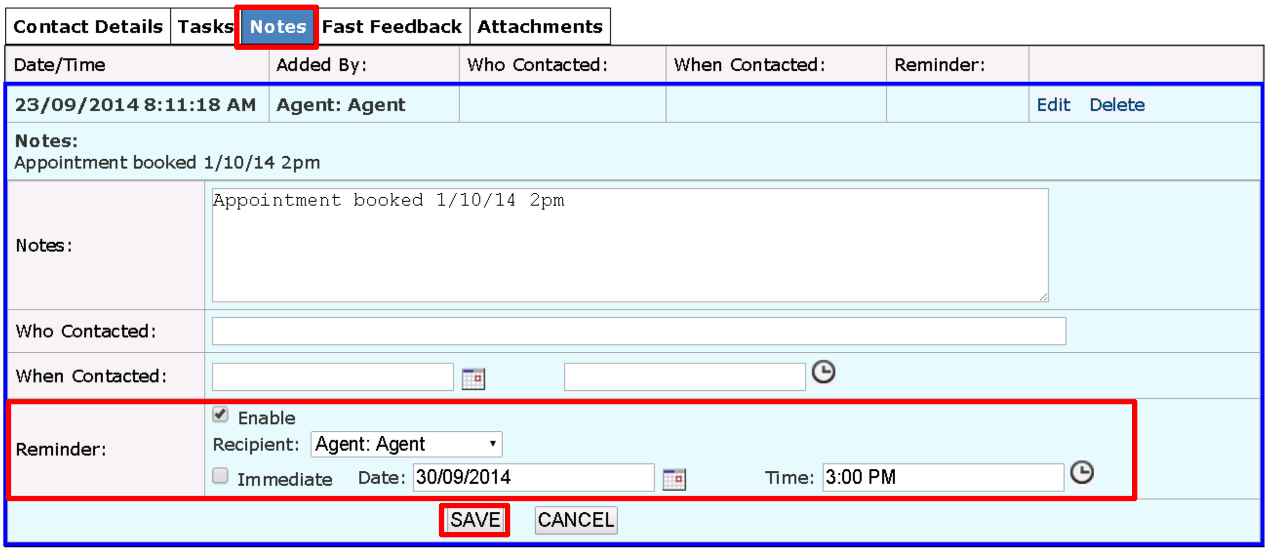
To set an email reminder for a note or send the note to others connected to the lead click *'Save + Follow Up'* after entering the required text in the Notes box.

Click *'Enable'* in the *'Reminder'* area.

Select the recipient of the note. The referrer of the lead can be selected as the recipient if desired.

Set the date and time for the email reminder or note to be sent. Select *'Immediate'* to send the note straight away.

Click *'Save'* when done.



Tasks

The *'Tasks'* tab displays the tasks required for that lead which will vary depending on the lead product.

Each task will state an action and an associated due date/time.

Tasks should be completed and updated before they are due.

To update a task as complete, click *'complete'* and then *'Save'*.

Contact Details | Tasks | Notes | Fast Feedback | Attachments

ID	Agent	Action	Date/Time	Reminder	Note	Complete
2 tasks						
10038	Agent	Client Contacted	24/09/2014 8:54 AM	Yes		23/09/2014 8:37:00 AM by Agent: Agent ◉complete ○ incomplete Save
10039	Agent	At the end of the lead process please ensure that you change the Lead Status to Not Proceeding or Sale Complete	14/01/2015 8:54 AM	Yes		○complete ◉ incomplete Save

To view a summary of all tasks click on the *'Tasks'* menu item

To open a specific tasks click the *'Details'* link

Agents Home | Leads | Tasks

Tasks

Due Date Range:

Complete Date Range:

Lead Status: All

Task Status: All

Apply Filters

Lead Products:

Finance
- Finance

Property
- Property

Financial Management
- Debt Management
- Investments
- Retail - Insurance
- Retail - Super
- Retail - Super & Insurance
- Retirement Planning
- Risk Insurance
- Wealth Creation

Superannuation Management
- SMSF
- SMSF Establishment A - L
- SMSF Establishment M - Z
- SMSF Establishment VIC

Accounting
- Business Services
- Tax Return & Audit - Company/Trust
- Tax Return & Audit - Personal
- Tax Return & Audit - SMSF

CALC
- Compliance and Learning
- New Broker
- New Planner
- Referrer

Legal
- Amendments
- Corporate Trust Deeds
- Estate Planning
- General Legal Advice
- Property Acquisition Trust
- Super Trust Deeds

Other
- 89 C
- 89C Database Only
- GG - Gift Certificate
- Home loan Comparison
- LW
- Mortgage Protection Insurance

Lead ID	Lead First Name	Lead Last Name	Lead Email	Lead Phone	Lead Skype	Lead Address1	Lead Address2	Lead Suburb	Lead State	Lead Postcode	Task ID	Agent	Action	Date/Time	Reminder	Note	Complete	
3715	Fred	Jones	jones@us.com	0433765432		56 Look Drive		Norville	NSW	2478	9270	Agent A	Client Contacted	29/07/2014 12:06 PM	Yes		OVERDUE	Details
3712	Harry	Brown	harry@email.com	0415 545 145		20 Main Road		Sydney	NSW	2551	9262	Agent A	Client Contacted	15/09/2014 8:59 AM	Yes		12/09/2014 1:27:23 PM by Agent: Agent A	Details
3856	Susan	Jones	sjones@email.com	0401 748 145		45 Hill Street		Melville	NSW	2114	10038	Agent A	Client Contacted	24/09/2014 8:54 AM	Yes		23/09/2014 8:37:00 AM by Agent: Agent A	Details

Notes

The *'Notes'* tab displays all the notes that have been added for the lead.

Contact Details | Tasks | **Notes** | Fast Feedback | Attachments

Date/Time	Added By:	Who Contacted:	When Contacted:	Reminder:	
23/09/2014 8:11:18 AM	**Agent: Agent**			**Agent: Agent** **30/09/2014 3:00 PM**	Edit Delete
Notes: Appointment booked 1/10/14 2pm					

Fast Feedback

The *'Fast Feedback'* tab displays the Fast Feedbacks that have been entered for the lead.

Fast Feedbacks are brief comments indicating what actions have occurred with the lead.

Agents can click on the links in this tab to add Fast Feedbacks.

Fast Feedbacks entered from emails will also appear in this tab.

Contact Details | Tasks | Notes | **Fast Feedback** | Attachments

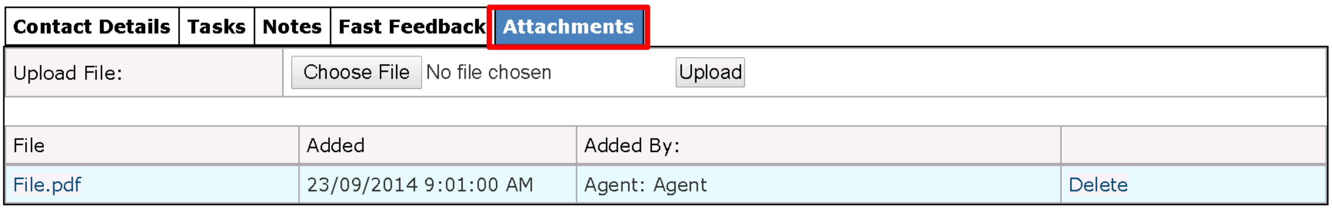
Add Fast Feedback	Application Taken Appointment Conducted Appointment Set Called Client - No answer Called Client - Successful Called Client - Voicemail Documents Drafted Documents given to client Email Sent File Closed File Opened Likely to Proceed Not Proceeding PENDING - Client on Hold Referral Acknowledged Research in progress Sale Successful Unlikely to Proceed

Date/Time	Added By:	Notes:
23/09/2014 8:53:01 AM	Agent: Agent	I have spoken with the client on the phone
23/09/2014 8:53:06 AM	Agent: Agent	An appointment has been set with this client

Attachments

The *'Attachments'* tab is where those connected to the lead can upload and view files.

Click *'Browse'* to select the required file and then click *'Upload'*.



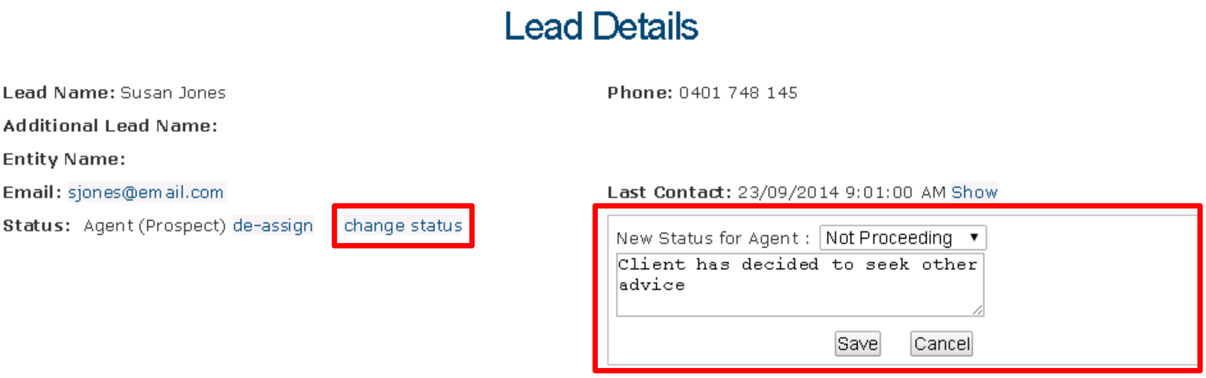
Lead Status

When a lead is qualified as *'Not Proceeding'* or *'Sale Complete'* the Lead Status should be changed to reflect this.

To change the status of a lead click *'change status'* from the *'Lead Details'* screen.

In the *'New Status'* box provided select the appropriate status and include a note with details for the new status e.g. reason why the client is not proceeding.

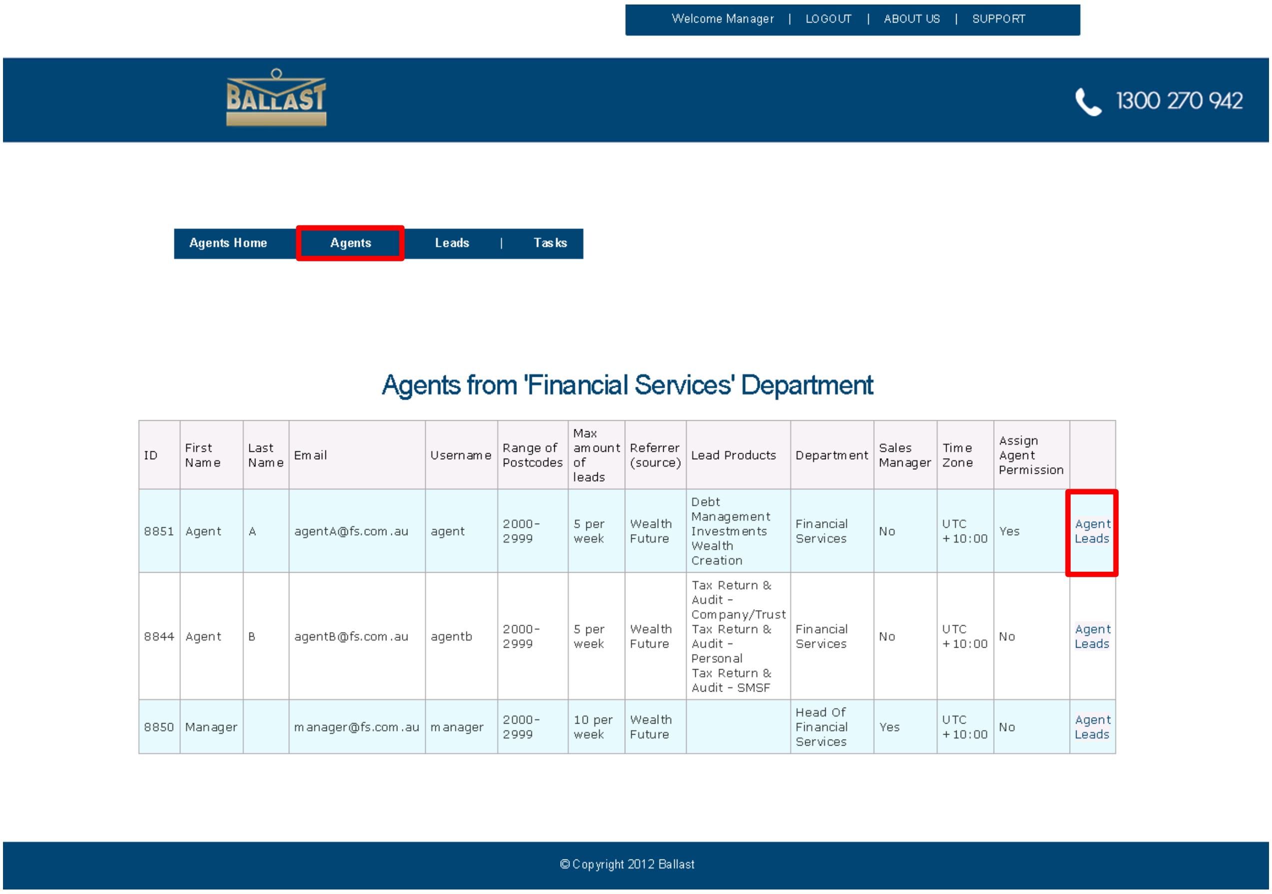
Click *'Save'* when done.



Managers

Managers/Heads of departments can view all the agents in their department by clicking the *'Agents'* menu item available to them.

To view the leads assigned to a specific agent click the *'Agent Leads'* link.



ID	First Name	Last Name	Email	Username	Range of Postcodes	Max amount of leads	Referrer (source)	Lead Products	Department	Sales Manager	Time Zone	Assign Agent Permission	
8851	Agent	A	agentA@fs.com.au	agent	2000-2999	5 per week	Wealth Future	Debt Management Investments Wealth Creation	Financial Services	No	UTC +10:00	Yes	Agent Leads
8844	Agent	B	agentB@fs.com.au	agentb	2000-2999	5 per week	Wealth Future	Tax Return & Audit - Company/Trust Tax Return & Audit - Personal Tax Return & Audit - SMSF	Financial Services	No	UTC +10:00	No	Agent Leads
8850	Manager		manager@fs.com.au	manager	2000-2999	10 per week	Wealth Future		Head Of Financial Services	Yes	UTC +10:00	No	Agent Leads

CustomerConnect for Agents

From the information contained in this user guide agents should be able to conduct the following in CustomerConnect:

- Log in to CustomerConnect
- Update leads
- Monitor agent performance and lead activity (managers)

Agents should provide sufficient information so that anyone, at any time, can determine by checking CustomerConnect what actions have occurred with the lead and what stage it is currently at.

The data recorded in CustomerConnect will also assist in the processing of commissions.

For any assistance with CustomerConnect please contact Elaine on (03) 8888 6000 or email strategicalliances@ballast.com.au