

Quick Start Guide

Using the Telemarketing Application



Spark

Quick-start Guide: Using the Telemarketing Application

Introduction

This Quick-start Guide will take you through, step-by-step, the actions required to execute an outbound call using the Telemarketing (TM) application. The Guide is intended for beginners with little to no experience with using the TM application.

The example used in this Guide is the TM project associated with the Turning 18 Dialog, however the principles are applicable across all other TM projects.

Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – sjfowler@spark.com.au

Stage 1: Access the Telemarketing application



1. Go to your Windows desktop and double-click on the TM icon, pictured right.
2. You will be presented with a login screen. Make sure the 'Clear cache' box is checked and that your 'Instance' is selected.

Portrait Dialogue Telemarketing

Portrait Dialogue

Username: Erin

Password: [masked]

Login

Use Windows authentication

[Advanced](#)

Instances: Your Institution Name Here

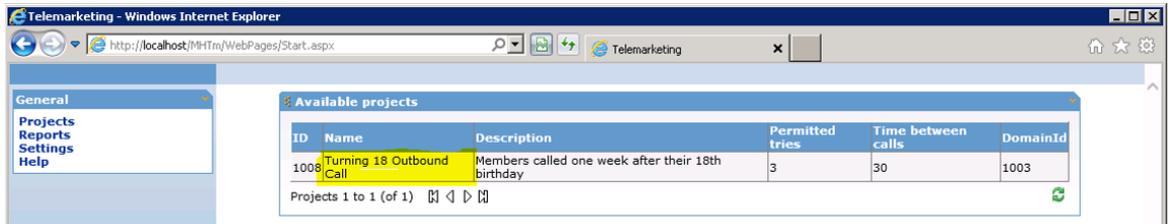
Clear cache

Portrait Software © Version: 6.0.0.267

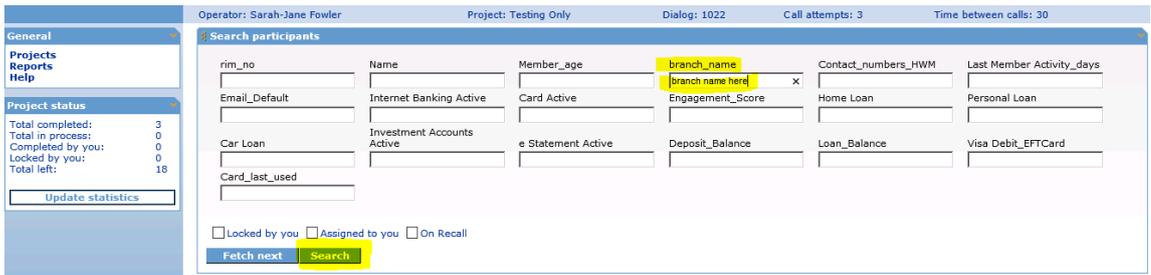
3. Log into the application using the following login details -
Username: (enter your first name)
Password: (enter your surname)

Stage 2: Select a member to call

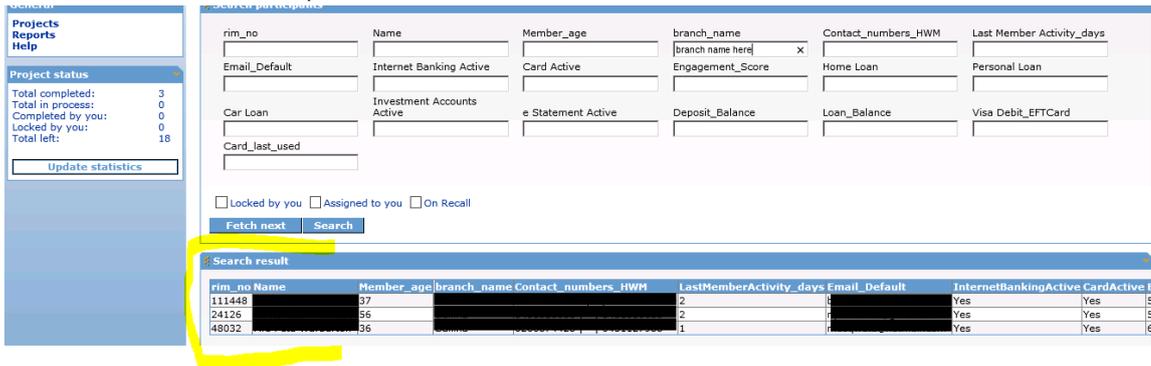
1. You will be presented with a screen that lists all current TM projects. Double-click on the one you are working on.



2. You will then be presented with a screen prompting you to search for a member. Simply type in your branch location then click 'Search'. Example pictured below:



3. A list of members will be presented. Double-click on one to select it.



4. Your screen now displays the member details on the left and the questionnaire on the right. (The 'Participant info' section on the left, is designed to provide you with a profile of the member with the intent to start a conversation. If you notice information missing or products that the member may not have but may be suitable for, you have the opportunity to ask). You can now make the phone call.

Participant info

rim_no
63852

Name
Mr James [REDACTED]

Member_age
18

branch_name
Lismore

Contact_numbers_HWM
02 5622 [REDACTED] | 04 [REDACTED]
240

Last Member Activity_days
1

Email_Default
-

Internet Banking Active
Yes

Card Active
Yes

Engagement_Score
6.15

Home Loan
No

Personal Loan
No

Car Loan
No

Investment Accounts Active
Yes

e Statement Active
No

Deposit_Balance
\$4610.00

Loan_Balance
\$0.00

Visa Debit_EFTCard
Yes | Yes

Card_last_used
4.1.0

eStatement Registration

eStatement Registration

eStatement registration initiated by Member requesting a call back to complete the registration process.

1. In relation to your most recent service experience with [REDACTED]

Exceeded your expectation

Met your expectation

Below your expectation

2. Thinking about specific areas of service how would you rate your experience?

	Yes	No
Were [REDACTED]	<input type="radio"/>	<input type="radio"/>
Were you provided with the information and solution you needed?	<input type="radio"/>	<input type="radio"/>
Did response times meet your expectations?	<input type="radio"/>	<input type="radio"/>

3. Which of the following products and services would you consider getting through [REDACTED]

	Yes	No
Home loan	<input type="radio"/>	<input type="radio"/>
Investment loan	<input type="radio"/>	<input type="radio"/>
Personal or car loan	<input type="radio"/>	<input type="radio"/>
Term deposit	<input type="radio"/>	<input type="radio"/>
High interest savings account	<input type="radio"/>	<input type="radio"/>
Transaction account	<input type="radio"/>	<input type="radio"/>
Insurance	<input type="radio"/>	<input type="radio"/>

4. What is the likelihood that [REDACTED]

Very likely

Likely

Possibly

Not likely

5. Do you regard [REDACTED]

Yes

No

6. How likely are you to recommend [REDACTED]

Very likely

Likely

Possibly

Not likely

7. Is there anything you would like to tell us about your Member experience?

Stage 3 (option 1): Call Successful – complete questionnaire

1. As you are talking with the member, complete the questionnaire with their responses. Keep scrolling down for further questions.
2. Once the questionnaire is complete you can click 'Forward'. The application will now save the customer's answers and return you to the search window.

Stage 3 (option 2): Set member call back

It is important to set and assign a call back to a member that you could not get a hold of. This puts the member back in the call queue then reminds you, or other team member, to call this member back at a specified time.

1. On the left hand side of the screen select 'End Call' in the Actions menu.

The screenshot shows a call center interface. On the left, there is a sidebar with a list of actions. The 'End call' button is highlighted in yellow. The main area displays a questionnaire with the following sections:

- 1. Exceeded your expectation**
 - Exceeded your expectation
 - Met your expectation
 - Below your expectation
- 2. Thinking about specific areas of service how would you rate your experience?**

	Yes	No
Were [redacted]	<input checked="" type="radio"/>	<input type="radio"/>
Were you provided with the information and solution you needed?	<input type="radio"/>	<input type="radio"/>
Did response times meet your expectations?	<input type="radio"/>	<input type="radio"/>
- 3. Which of the following products and services would you consider getting through [redacted]**

	Yes	No
Home loan	<input type="radio"/>	<input type="radio"/>
Investment loan	<input checked="" type="radio"/>	<input type="radio"/>
Personal or car loan	<input type="radio"/>	<input type="radio"/>
Term deposit	<input type="radio"/>	<input type="radio"/>
High interest savings account	<input type="radio"/>	<input type="radio"/>
Transaction account	<input type="radio"/>	<input type="radio"/>
Insurance	<input type="radio"/>	<input type="radio"/>
- 4. What is the likelihood that you will use [redacted]**

2. Select the 'Call Later' button and fill in the date and time of the call back. Select either 'By anyone', or 'By me'. Enter any additional comments then click 'Post'.

The screenshot shows a call center interface with the 'Call Later' form. The 'Call Later' radio button is selected and highlighted in yellow. The form includes the following fields:

- Registered for eStatements**
- Call Later Unsuccessfull
- Call later date: 11/25/2014
- Call later time: 22:29
- By anyone By me
- Comments: [Empty text area]
- Post: [Yellow button]

Stage 4: Update statistics

1. Once you have either completed the questionnaire or selected an appropriate reason for an unsuccessful call, you will be redirected to the first member search page. On the left hand menu, click 'Update Statistics'. This will now reflect how many calls are left in the queue.

The screenshot shows a web application interface. On the left is a sidebar menu with a blue header 'General' and a dropdown arrow. Below it are links for 'Projects', 'Reports', and 'Help'. The 'Project status' section is expanded, showing a table of statistics: Total completed: 0, Total in process: 3, Completed by you: 0, Locked by you: 3, and Total left: 20. A yellow 'Update statistics' button is at the bottom of this section. The main content area is titled 'Search participants' and contains a search form with several input fields: srim_no, branch, member_age, has_IB_banking, has_debit_card, Savings_balance, Mortgage_balance, Commercial_balance, Personal_balance, and email_default. Below the form are three checkboxes: 'Locked by you', 'Assigned to you', and 'On Recall'. At the bottom are two buttons: 'Fetch next' and 'Search'.

Project status	
Total completed:	0
Total in process:	3
Completed by you:	0
Locked by you:	3
Total left:	20

Search participants		
srim_no	branch	member_age
has_IB_banking	has_debit_card	Savings_balance
Mortgage_balance	Commercial_balance	Personal_balance
email_default		

Locked by you Assigned to you On Recall

CONGRATULATIONS! You have now completed your first outbound call using the Telemarketing application. Simply repeat stages 2-4 to work through the call queue for your project.