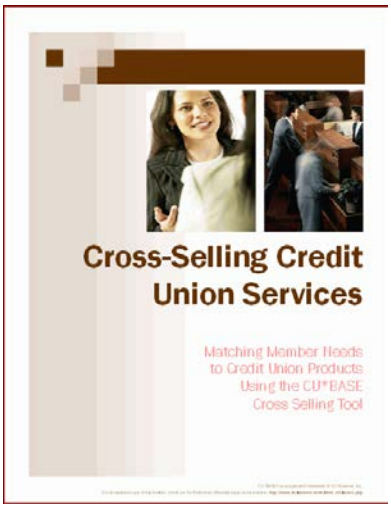
How to Tracker from Cross Sales

INTRODUCTION

The CU*BASE Cross Sales Program is a great benefit to your members and your staff! When effectively utilized the Cross Sales system will allow you to easily identify each conversation each of your team members have had with a member. Create stronger relationships with your members just by utilizing CU*BASE Cross Sales. Your members will thank you!

Check out the Companion Booklet:



Find this document under C on the CU*Answers Reference Page:

https://www.cuanswers.com/resources/doc/cubase-reference/

For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/client_reference.php
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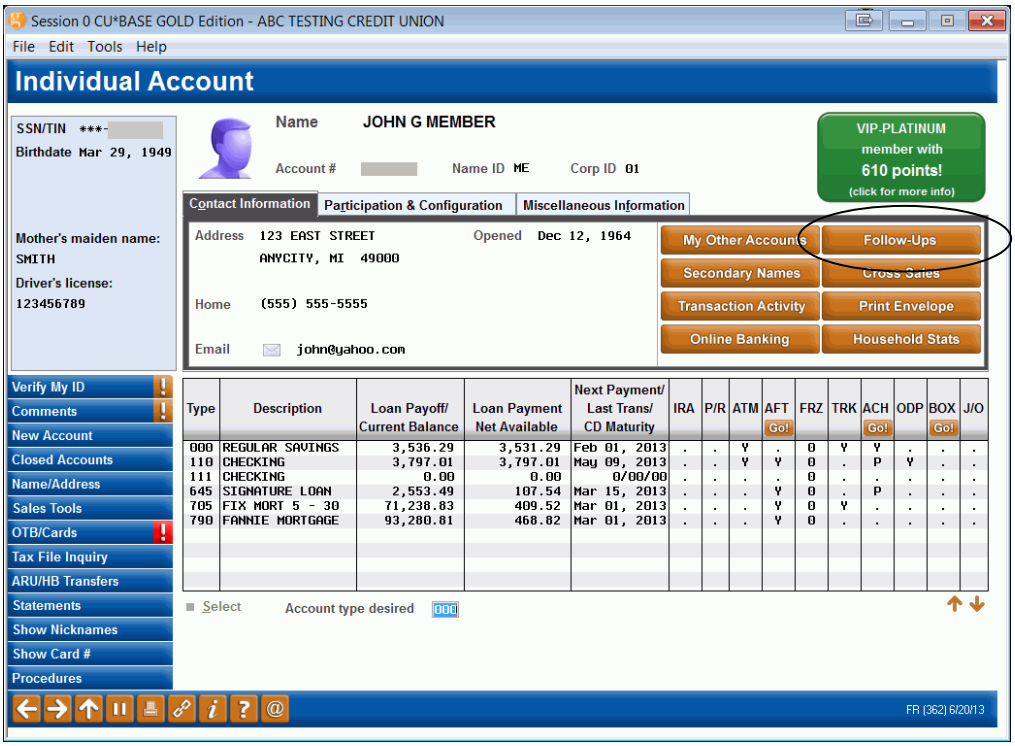
ACCESSING CROSS SALES

CU*BASE Sales Trackers can be viewed many ways from within the system. This outline will review using the Cross Sales Button from any member inquiry screen (Phone Operator, Teller Processing or Inquiry).

In order to work from the Cross Sale screen, select the Cross Sale button from the Individual Account screen.

> *Use the "Follow-ups" button to access the Work with Follow-ups screen to view the outstanding follow-ups for that member.*



USING THE CROSS SALES TASKS SCREENS

1. To view the last conversation, select the line under Need Group and click *View Last Conversation*. Or to create a new conversation, click *Create Conversation*.

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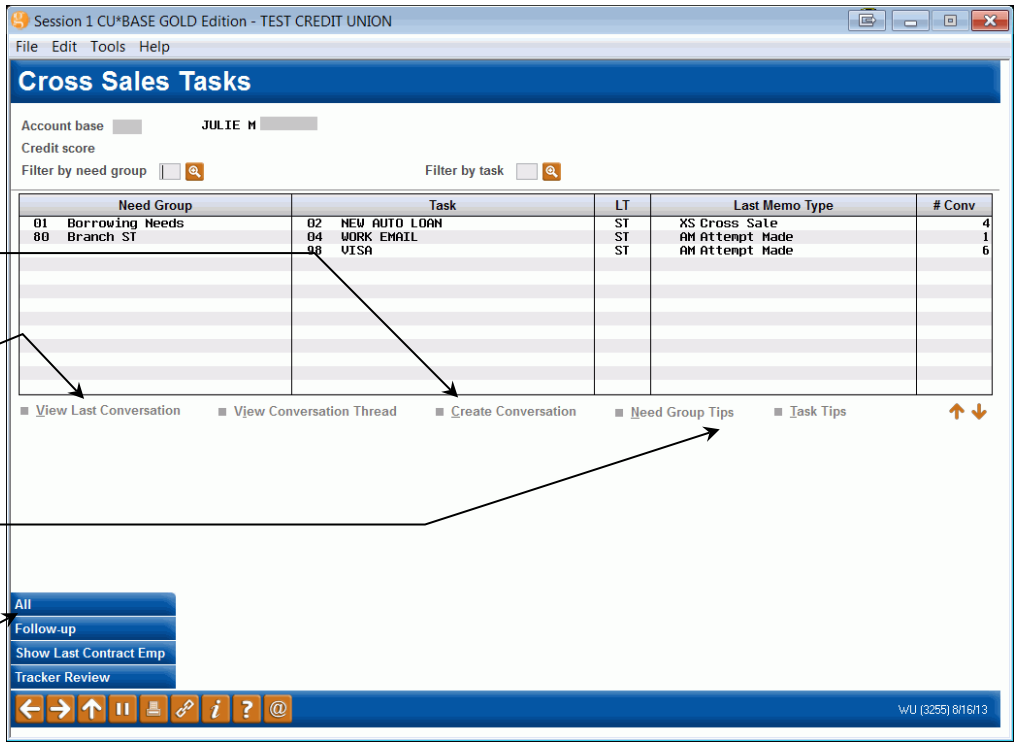
Task Tips and *Need Group Tips* are great tools to tell you what you should say next to your member.

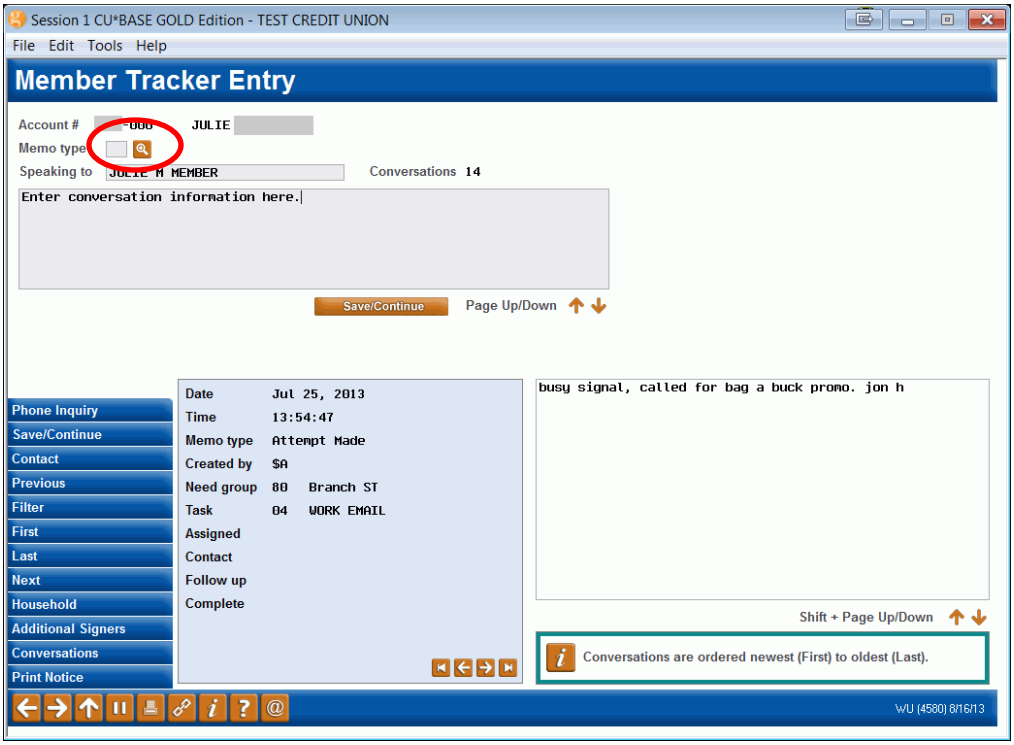
To view all Need Groups and Tasks, click the *All* button.



- There may be additional Need Groups and Tasks where there are no conversations. To see all of them, click the ***All*** button.

If your credit union is using the Decision Model, and if a credit report has been pulled in the credit union-specified time frame, the "Cross Sales" button will change to "Pre-approvals", and clicking on it will display a complete list of products and services for which the member is pre-approved.

Once you have selected your Cross Sales Task and have selected Create Conversation, the next step is to identify your "action code" or Memo Type. To do this, use the lookup next to Memo Type.

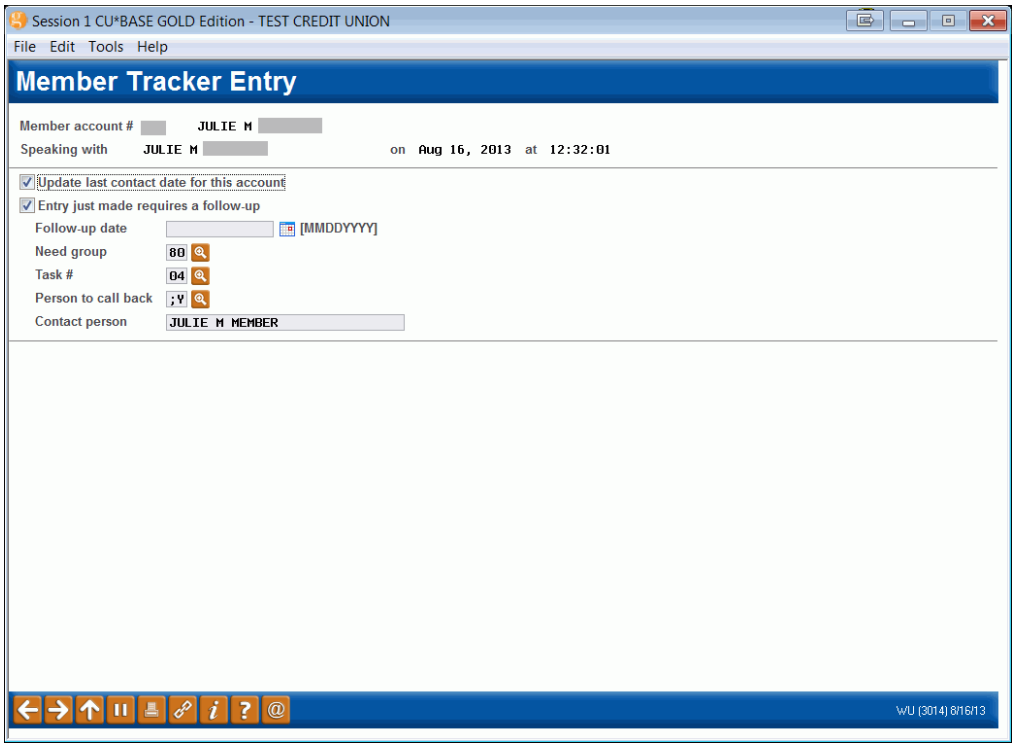


Memo types will help you determine where you are in the relationship with the member. Select the most appropriate action code/Memo Type at this time.

- In the smaller blue and white text fields at the bottom of the screen you will also see any previous conversations you have had with this member for this Need Group and Task. To see additional conversations, select the left and right arrow keys under the small blue box (on the left).

1. Use this screen to type your text or the details important to this conversation that you are having with the member.
2. When you are ready click *Save/Continue*.

3. The next Member Tracker Entry screen allows you to indicate if the member requires a follow up. This is where you will decide if you or another team member needs to call the member back or send more information. Or you may just want to check back at a later date to see if any progress has been made with the sale for this Need Group and Task.



4. Always leave the first box *Update last contact date for this account* checked.

5. If the member does not need a follow up, uncheck the box that says *Entry just made requires a follow-up*. If entry requires follow up, leave that box checked. Enter the follow-up date or use the calendar next to the field to select the date.

6. The Need Group and Task should be filled in with the same Need Group and Task that were selected at the very beginning of the process. When working in the Cross Sale System, it is not recommended that you replace a new Need Group and Task at this time.

7. Select the appropriate *Person to call back* by using the lookup.

8. When finished press Enter to save your information, and you will be returned to the Cross Sales Tasks window where you began!

Congratulations! You have completed a Tracker! Don't forget to select learn more about this feature at any time by selecting at the bottom of your CU*BASE screen.