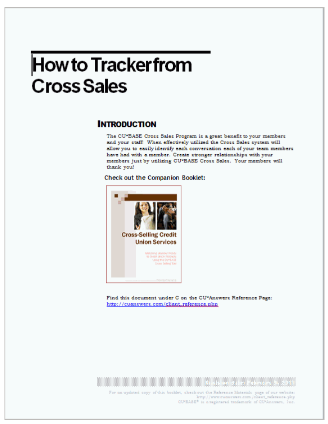
How to Work with Member Follow-ups

INTRODUCTION

Using the CU*BASE Cross Sales and Sales Tracker Programs are not only excellent ways for you to keep track of your sales over a period of time, but they can also be very effective tools when building your member relationship programs. Before reading this document please refer to the document "How to Tracker from Cross Sales."

http://www.cuanswers.com/pdf/cb_ref/HowtoTrackerfromCrossSales.pdf



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:

Cross-Selling Credit Union Services

Find this document under C on the CU*Answers Reference Page:
http://cuanswers.com/client_reference.php

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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Or go deeper with matching member needs to credit union products using the CU*BASE Cross selling tools, review the Cross Selling booklet on the CU*BASE Reference page.

When creating the Sales Tracker from Cross Sales you may be thinking…

- If I schedule a follow-up, where do I go to see what I have created?
- What if I want to assign the Sales Tracker to another employee for follow up?
- How will this employee know I have done this?

This document will answer these questions and more.

Revision date: May 14, 2025

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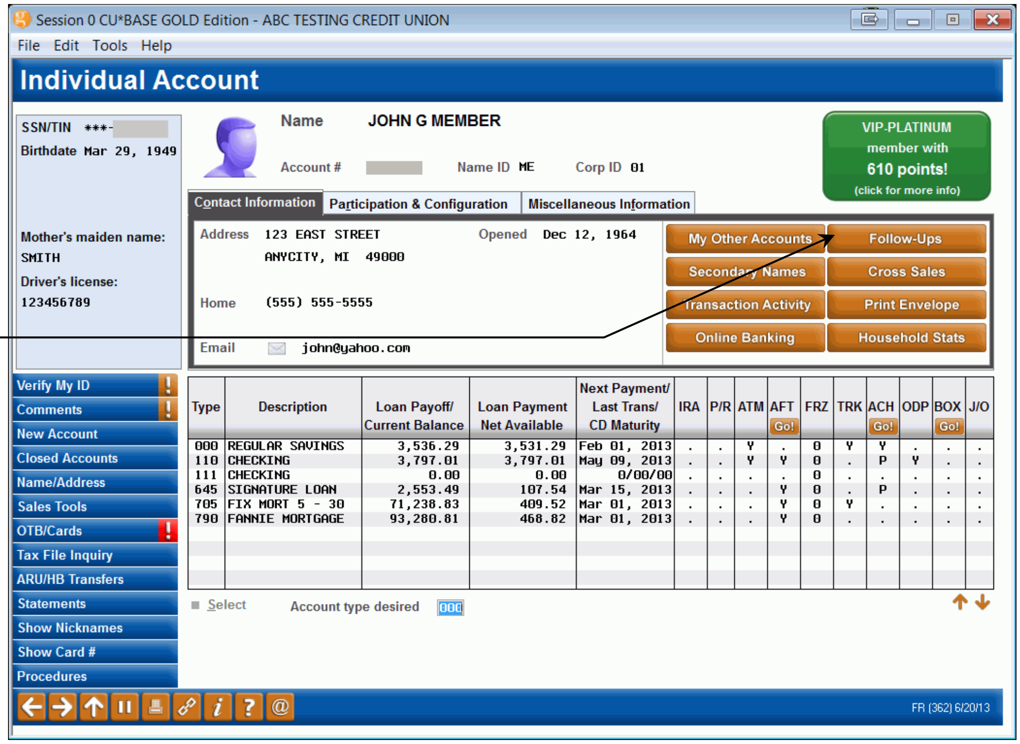
Finding Your Follow-Up

Select **Tool #5 *Work With Member Follow-ups*** or if a follow-up exists for a member, you can access the Follow-ups screen through Teller, Inquiry or Phone Operator. Just click on the *Outstanding Follow-ups* button.

Clicking the "Outstanding Follow-ups" button

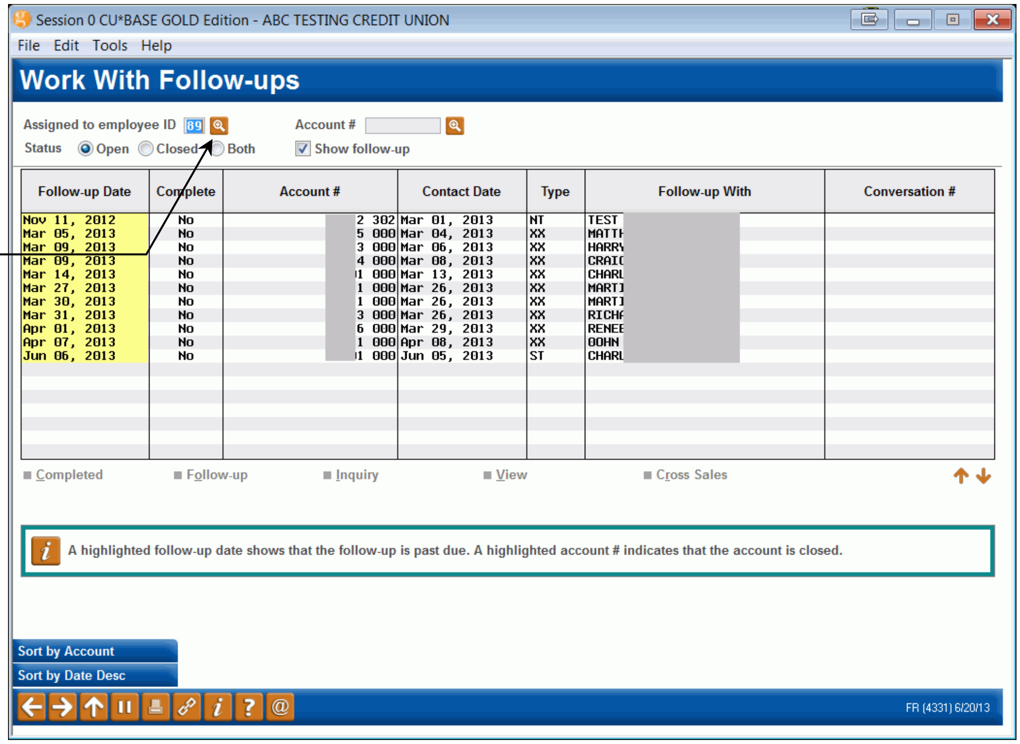
Click the *Follow-ups* button to access the *Work with Follow-ups* screen while in Inquiry and Phone Operator.



The Follow-up Screen

When entering the Work Follow Ups Program, you will see the Trackers that are assigned to you.

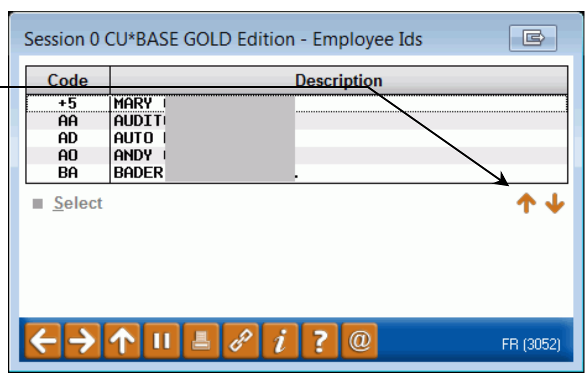
If the Employee ID is unknown use the lookup to view a pop-up screen with a listing of all of the Employee IDs.



If you would like to see the Trackers assigned to any other employee you must enter the two-digit ID of that employee in the *Assigned to Employee ID* box.

If the Employee ID is unknown use the lookup to view a pop-up screen listing the available employee IDs. Select the Employee ID from the list by double clicking the name or by selecting the name and clicking Select. If the Employee ID is not shown on the list, scroll down the list by clicking the up and down arrows.

If you don't see the Employee ID on the list scroll down the lists by clicking the up and down arrows.

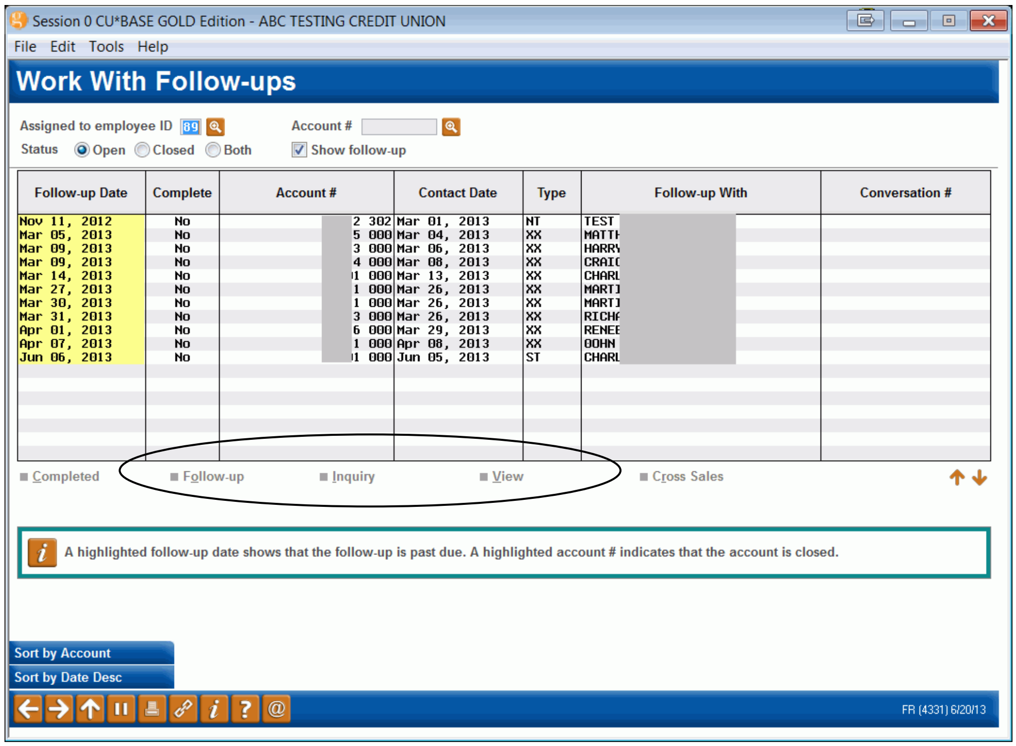


Working with Your Follow-Up

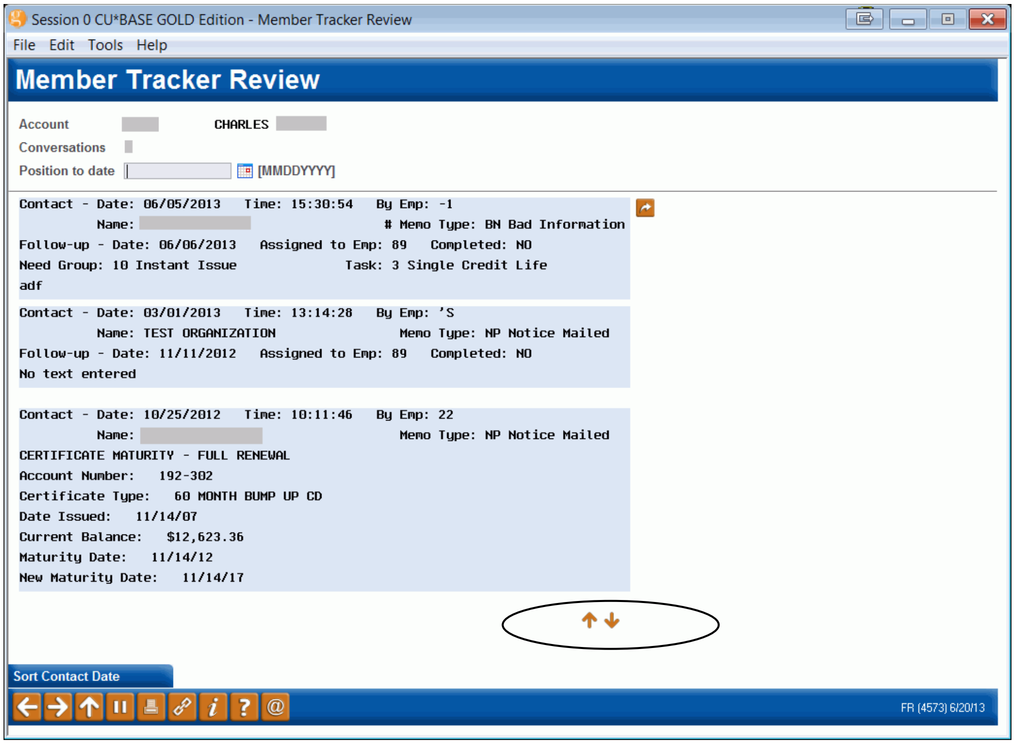
There are a few things you can do to find out more information about your follow up.

We will look at:

1. View
2. Follow-up
3. Inquiry



VIEW

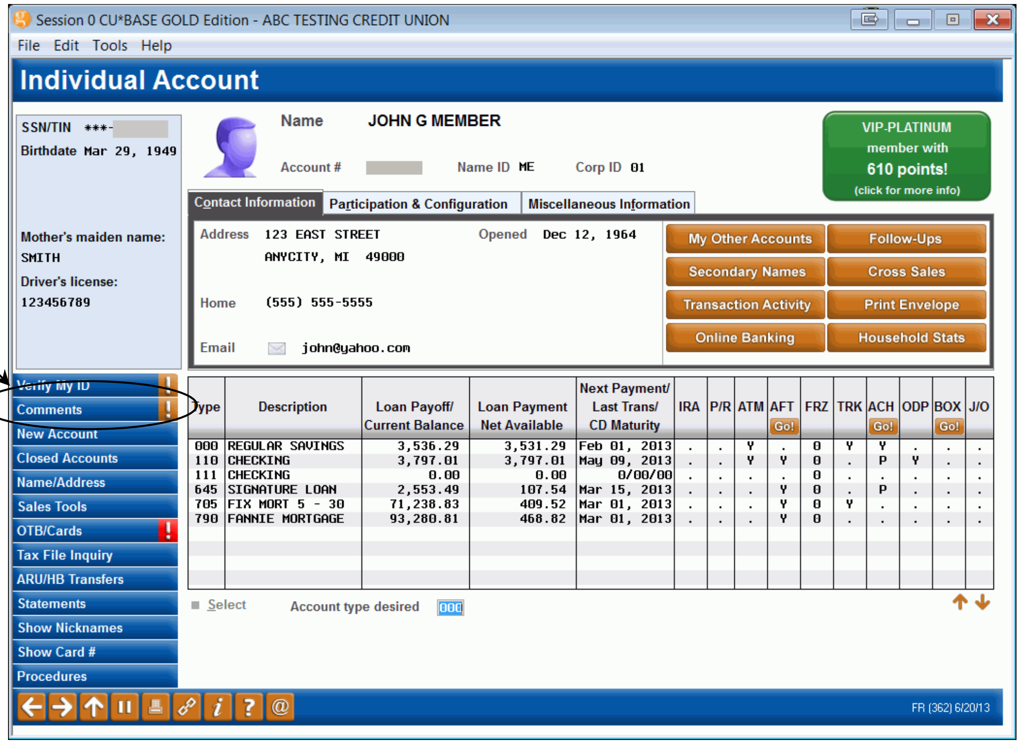


The View screen is an overview of all the conversations entered to date. If there is more than one on the screen you can select your down arrow key to see more.

After viewing what the follow up required use the back arrow.

INQUIRE

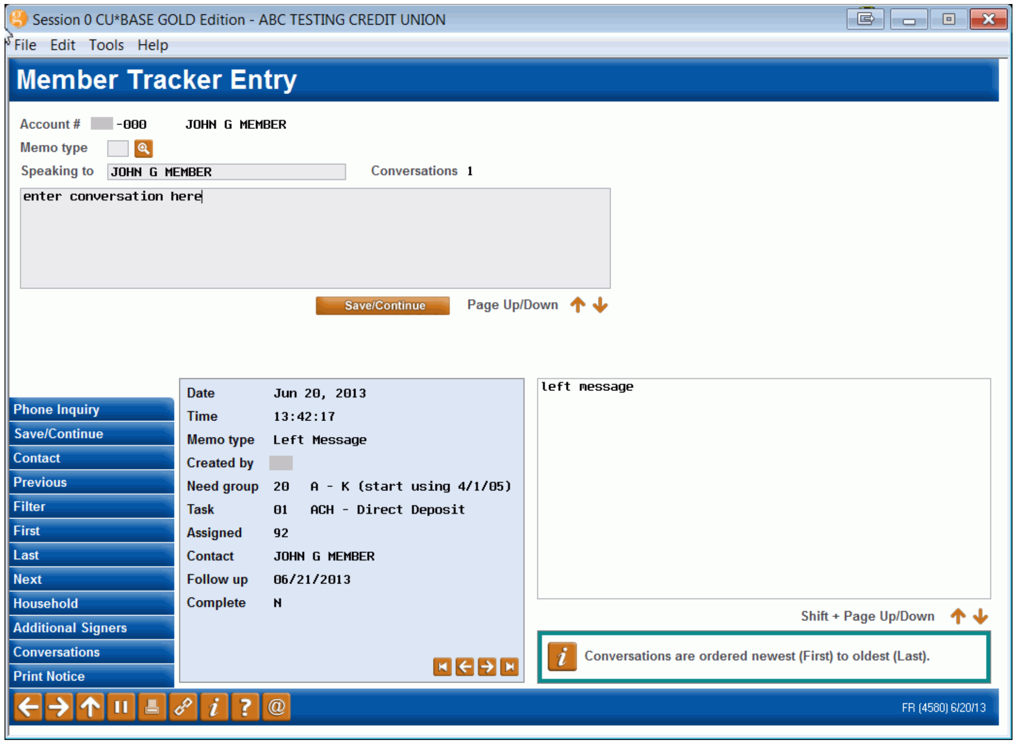
Hint: If there are existing comments, this button will have an exclamation mark.



The Inquire screen is where you can view the member's account to gain information to complete the follow up.

Here you may wish to check for other comments by using the *Comments* button. In order to exit this screen use the down arrow.

FOLLOW-UP



The Follow Up screen is where the Tracker is entered for your new conversation.

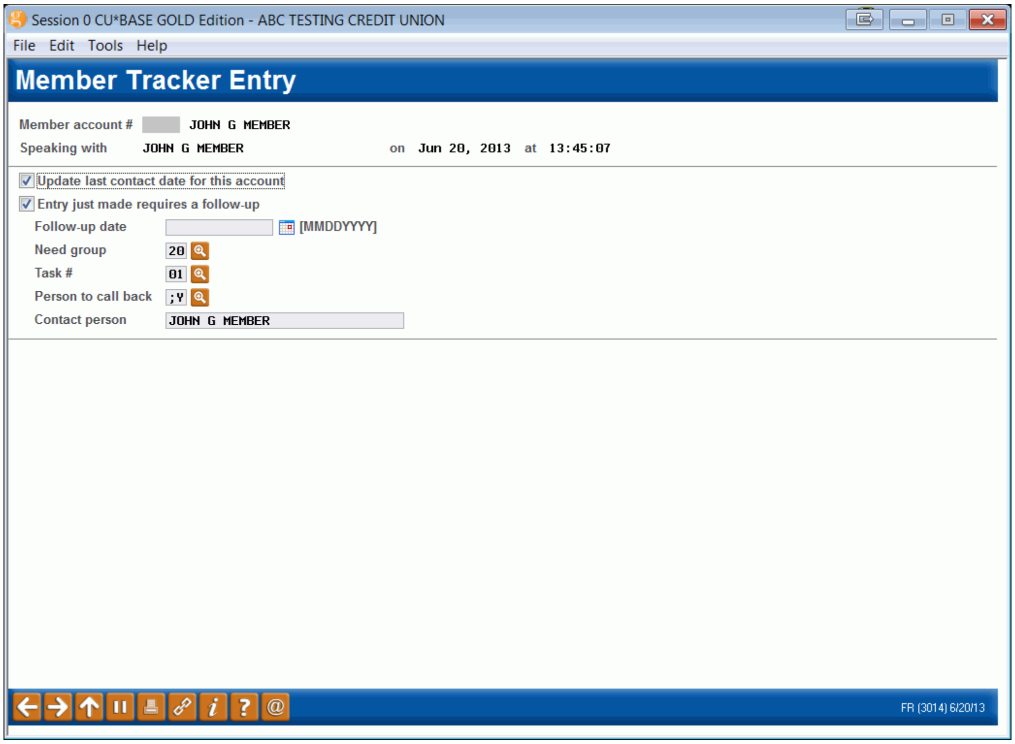
1. The next step is to identify your "action code" or Memo Type. To do this, use the lookup next to Memo Type. Memo types will help you determine where you are in the relationship with the member. Select the most appropriate action code/Memo Type at this time.

    - 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).

2. Use this screen to type your text or the details important to this conversation that you are having with the member.

3. When you are ready use the blue *Save Continue* (F5) button.

IS ANOTHER FOLLOW-UP REQUIRED?



The next Member Tracker Entry screen allows you to indicate if the member requires a follow-up. Here 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 in CU*BASE to see if any progress has been made with the sale or other type of conversation.

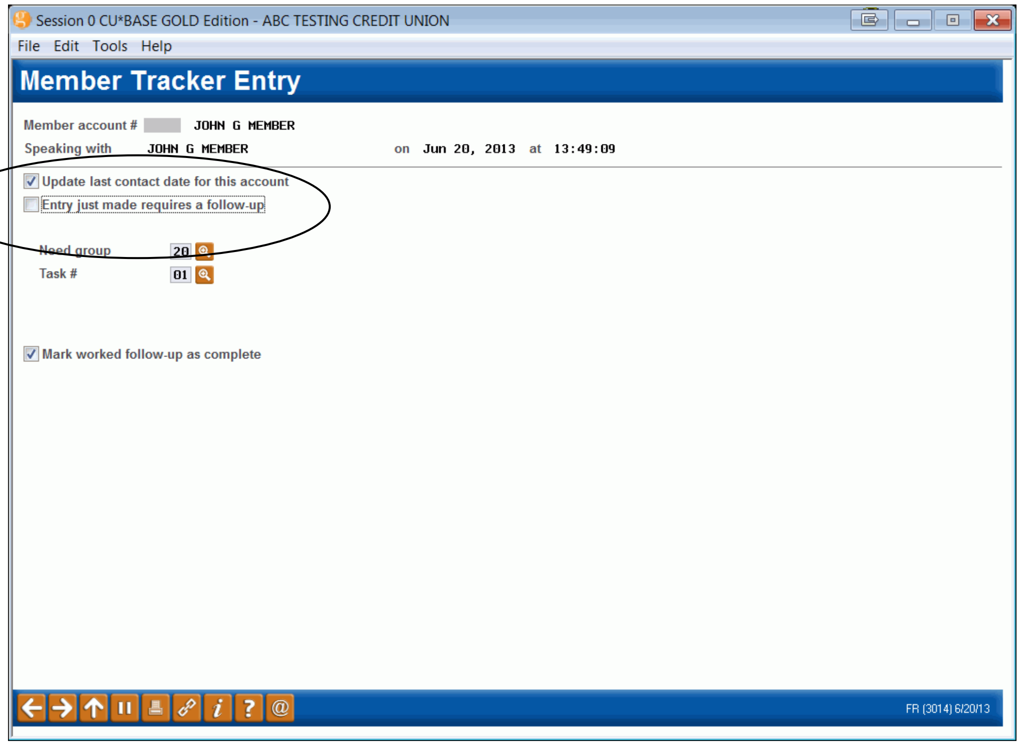
- Always leave *Update last contact date for this account* checked.
- If entry requires a follow up, leave *Entry just made requires a follow-up* checked. (Uncheck it if one is not required.) Enter the follow-up date or use the calendar next to the field to select the date.
- The Sales Tracker Program has a great memory and will remember if your original conversation was created using CU*BASE Cross Sales. If they were previously used, the appropriate Need Group and Task will display here.
- It is not suggested this Need Group and Task be changed. If your conversation changes and you need to use a new Need Group or Task, you may change the Need Group or Task to reflect the change.

  For example: An employee calls a member who has expressed interest in saving for a new car by investing in a certificate. The Need Group and Task for the Tracker is “Certificate” and the intent of the follow-up is for the certificate. Mid-stream in the conversation the member states they received an inheritance and they are ready to purchase the car. The Need Group and Task then needs to be changed from Certificate to Loan. Using the lookup next to the Need Group and Task fields the employee now selects the new Need Groups or Tasks associated with “Loan.”

- Next select the employee who will call the member back by using the lookup next to *Person to call back*. When finished, press Enter to save your information and you will be returned to the Work Follow Ups window where you began.

When No Follow-up is Required

When no follow-up is required simply uncheck the box *Entry Just Made Requires a follow-up*.



Leave the box *Mark worked follow-up as complete* checked and press Enter.

You will be brought back to the Work Follow-Ups Window where you began.

You are ready to move on to the next follow-up!

Other Tracker Facts:

- Access to *Work with Member Follow-Ups* must be granted using **Tool #327 *CU*BASE Employee Security.***

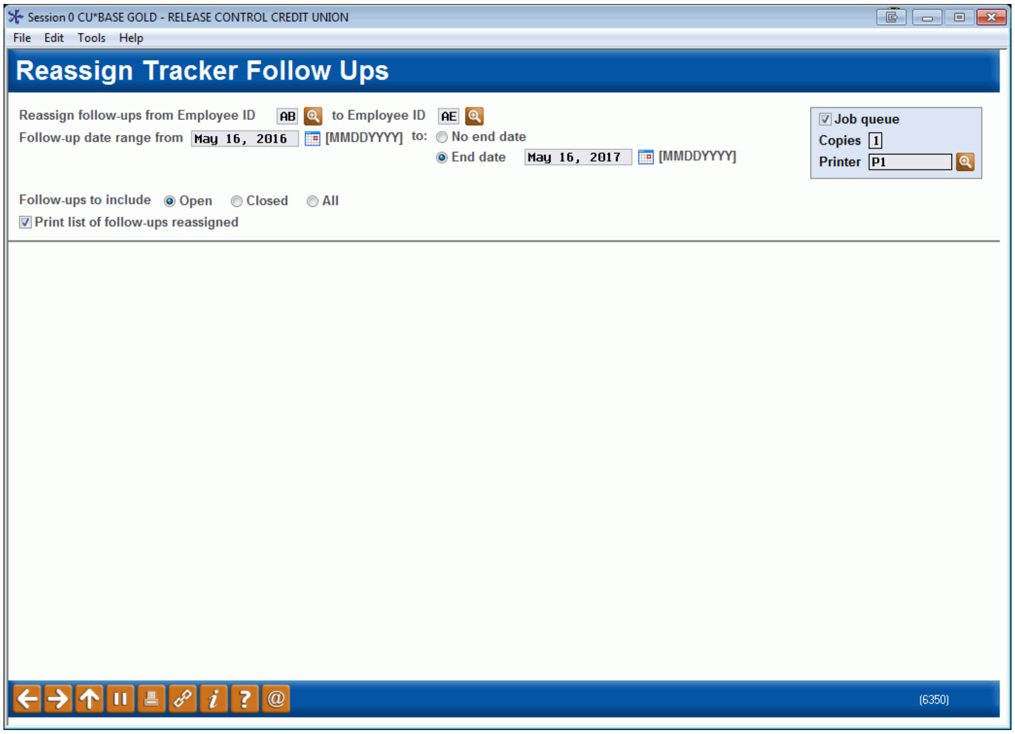
- Active use of the CU*BASE Sales Tracker system is an integral aspect to the success of your ongoing Member Relationship programs. By using Sales Trackers, you can offer one of a kind services but knowing exactly what to say to the member at exactly the right time is also critical.

Reassigning Member Follow-Ups

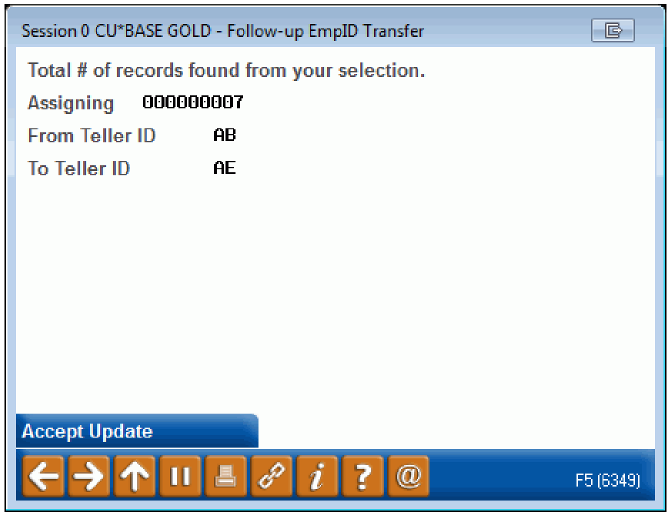
Reassigning Batch of Follow-Ups

If an employee is no longer able to complete their assigned follow-ups, CU*BASE has a tool that will allow your credit union to reassign follow-ups, both closed and open, to a different employee.

Reassign Tracker Follow-ups to Other ID **(Tool #1035)**



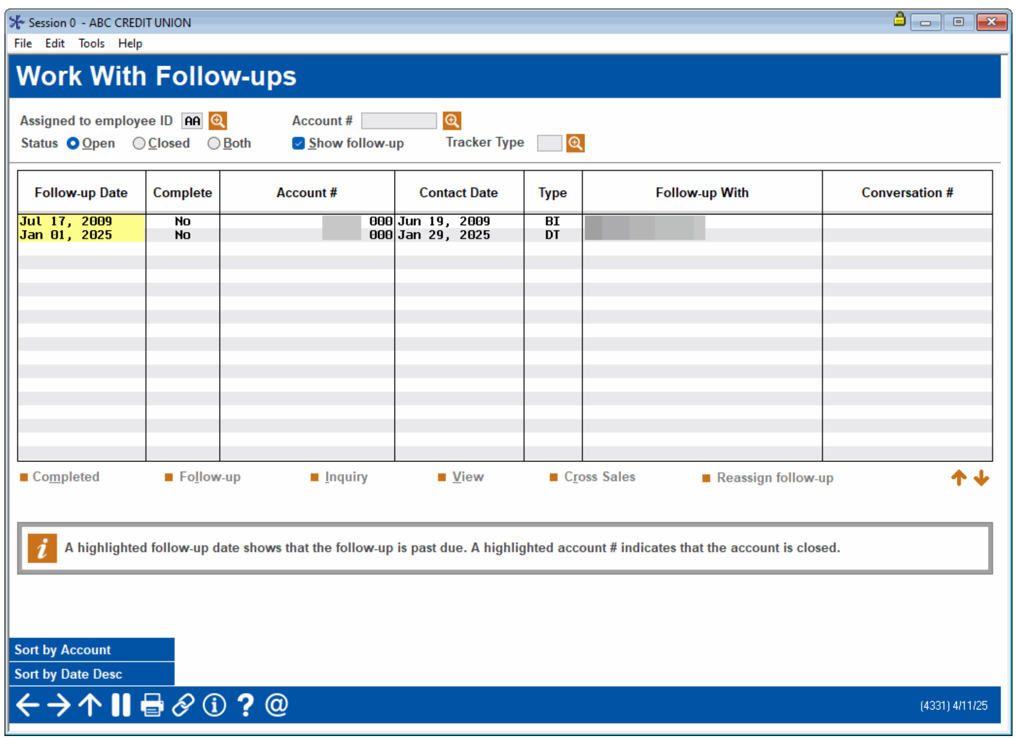
1. Enter the employee ID that you wish to transfer follow-ups to and from, as well as the date range.
2. Select whether to include Open, Closed, or All follow-ups.
3. Check the box and select the appropriate printer to print a report of follow-ups reassigned.
4. Press Enter to move to the confirmation screen, and select "Accept Update"



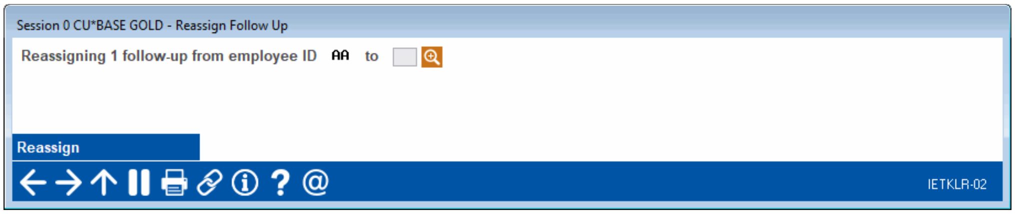
REASSIGNING SINGLE FOLLOW-UP

If you wish to reassign a tracker to a different employee ID (to correct a mistakenly assigned tracker, for example), you may do so within the Work with Follow-ups screen.

Reassign Single Follow-Up **(Tool #5)**



1. From **Tool #5 *Work With Member Follow-ups***, search for the tracker.
2. Select the tracker from the list and choose the Reassign follow-up option.



3. Enter the employee ID to which you'll reassign the tracker (or use the lookup).
4. Select **Reassign.**