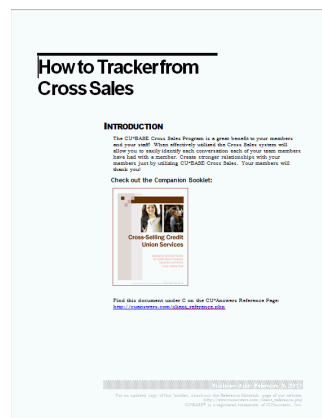

How to Work with Member Follow-ups

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



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: December 24, 2024

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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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.

Session 0 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Individual Account

SSN/TIN ***- Birthdate Mar 29, 1949

Name **JOHN G MEMBER**

Account # Name ID ME Corp ID 01

VIP-PLATINUM member with 610 points! (click for more info)

Mother's maiden name: SMITH

Driver's license: 123456789

Contact Information Participation & Configuration Miscellaneous Information

Address 123 EAST STREET ANVCITY, MI 49000

Opened Dec 12, 1964

Home (555) 555-5555

Email john@yahoo.com

My Other Accounts Follow-Ups

Secondary Names Cross Sales

Transaction Activity Print Envelope

Online Banking Household Stats

Type	Description	Loan Payoff/ Current Balance	Loan Payment Net Available	Next Payment/ Last Trans/ CD Maturity	IRA	P/R	ATM	AFT	FRZ	TRK	ACH	ODP	BOX	J/O
000	REGULAR SAVINGS	3,536.29	3,531.29	Feb 01, 2013	.	.	V	.	0	V	V	.	.	.
110	CHECKING	3,797.01	3,797.01	May 09, 2013	.	.	V	V	0	.	P	V	.	.
111	CHECKING	0.00	0.00	0/00/00	.	.	.	.	0	.	.	.	.	.
645	SIGNATURE LOAN	2,553.49	107.54	Mar 15, 2013	.	.	.	V	0	.	P	.	.	.
705	FIX MORT 5 - 30	71,238.83	409.52	Mar 01, 2013	.	.	.	V	0	V	.	.	.	.
790	FANNIE MORTGAGE	93,280.81	468.82	Mar 01, 2013	.	.	.	V	0	.	.	.	.	.

Select Account type desired 000

FR (362) 6/20/13

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.

Session 0 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Work With Follow-ups

Assigned to employee ID Account #

Status ☒ Open ☐ Closed ☐ Both ☒ Show follow-up

Follow-up Date	Complete	Account #	Contact Date	Type	Follow-up With	Conversation #
Nov 11, 2012	No	2 302	Mar 01, 2013	NT	TEST	
Mar 05, 2013	No	5 000	Mar 04, 2013	XX	MATT	
Mar 09, 2013	No	3 000	Mar 06, 2013	XX	HARRY	
Mar 09, 2013	No	4 000	Mar 06, 2013	XX	CHARL	
Mar 14, 2013	No	1 000	Mar 13, 2013	XX	CHARL	
Mar 27, 2013	No	1 000	Mar 26, 2013	XX	MARTJ	
Mar 30, 2013	No	1 000	Mar 26, 2013	XX	MARTJ	
Mar 31, 2013	No	3 000	Mar 26, 2013	XX	RICH	
Apr 01, 2013	No	6 000	Mar 29, 2013	XX	RENEE	
Apr 07, 2013	No	1 000	Apr 08, 2013	XX	DOHN	
Jun 06, 2013	No	1 000	Jun 05, 2013	ST	CHARL	

Completed Follow-up Inquiry View Cross Sales


A highlighted follow-up date shows that the follow-up is past due. A highlighted account # indicates that the account is closed.

Sort by Account
Sort by Date Desc

Navigation icons: back, forward, up, down, print, link, info, help, search

FR (4331) 6/20/13

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.

Session 0 CU*BASE GOLD Edition - Employee Ids

Code	Description
+5	MARY I
AA	AUDIT
AD	AUTO I
AD	ANDY I
BA	BADER

Select

Navigation icons: back, forward, up, down, print, link, info, help, search

FR (3052)

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

Session 0 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Work With Follow-ups

Assigned to employee ID Account #

Status ☒ Open ☐ Closed ☐ Both ☒ Show follow-up

Follow-up Date	Complete	Account #	Contact Date	Type	Follow-up With	Conversation #
Nov 11, 2012	No	2 302	Mar 01, 2013	NT	TEST	
Mar 05, 2013	No	5 000	Mar 04, 2013	XX	MATT	
Mar 09, 2013	No	3 000	Mar 06, 2013	XX	HARRY	
Mar 09, 2013	No	4 000	Mar 06, 2013	XX	CRAT	
Mar 14, 2013	No	11 000	Mar 13, 2013	XX	CHARL	
Mar 27, 2013	No	1 000	Mar 26, 2013	XX	MART	
Mar 30, 2013	No	1 000	Mar 26, 2013	XX	MART	
Mar 31, 2013	No	3 000	Mar 26, 2013	XX	RICH	
Apr 01, 2013	No	6 000	Mar 29, 2013	XX	RENEE	
Apr 07, 2013	No	1 000	Apr 06, 2013	XX	ODAN	
Jun 06, 2013	No	11 000	Jun 05, 2013	ST	CHARL	

☒ Completed ☒ Follow-up ☐ Inquiry ☐ View ☐ Cross Sales

A highlighted follow-up date shows that the follow-up is past due. A highlighted account # indicates that the account is closed.

Sort by Account
Sort by Date Desc

FR (4331) 6/20/13

VIEW

Session 0 CU*BASE GOLD Edition - Member Tracker Review

File Edit Tools Help

Member Tracker Review

Account

Conversations

Position to date [MMDDYYYY]

Contact - Date: 06/05/2013 Time: 15:30:54 By Emp: -1
Name: # Memo Type: BN Bad Information

Follow-up - Date: 06/06/2013 Assigned to Emp: 89 Completed: NO
Need Group: 10 Instant Issue Task: 3 Single Credit Life
adf

Contact - Date: 03/01/2013 Time: 13:14:28 By Emp: 'S
Name: TEST ORGANIZATION Memo Type: NP Notice Mailed

Follow-up - Date: 11/11/2012 Assigned to Emp: 89 Completed: NO
No text entered

Contact - Date: 10/25/2012 Time: 10:11:46 By Emp: 22
Name: Memo Type: NP Notice Mailed

CERTIFICATE MATURITY - FULL RENEWAL
Account Number: 192-302
Certificate Type: 60 MONTH BUMP UP CD
Date Issued: 11/14/07
Current Balance: \$12,623.36
Maturity Date: 11/14/12
New Maturity Date: 11/14/17

Sort Contact Date

Navigation icons: back, forward, up, down, search, etc.

FR (4573) 6/2013

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.


Session 0 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Individual Account

SSN/TIN ***-
Birthdate Mar 29, 1949

Mother's maiden name:
SMITH
Driver's license:
123456789


Name **JOHN G MEMBER**
Account # Name ID ME Corp ID 01

VIP-PLATINUM
member with
610 points!
(click for more info)

Contact Information Participation & Configuration Miscellaneous Information

Address 123 EAST STREET Opened Dec 12, 1964
ANN CITY, MI 49000

Home (555) 555-5555

Email john@yahoo.com

My Other Accounts Follow-Ups
Secondary Names Cross Sales
Transaction Activity Print Envelope
Online Banking Household Stats

Verify my ID
Comments !
New Account
Closed Accounts
Name/Address
Sales Tools
OTB/Cards
Tax File Inquiry
ARU/HB Transfers
Statements
Show Nicknames
Show Card #
Procedures

Type	Description	Loan Payoff/ Current Balance	Loan Payment Net Available	Next Payment/ Last Trans/ CD Maturity	IRA	P/R	ATM	AFT	FRZ	TRK	ACH	ODP	BOX	J/O
000	REGULAR SAVINGS	3,536.29	3,531.29	Feb 01, 2013	.	.	Y	.	0	Y	Y	.	.	.
110	CHECKING	3,797.01	3,797.01	May 09, 2013	.	.	Y	Y	0	.	P	Y	.	.
111	CHECKING	0.00	0.00	0/00/00	.	.	.	.	0	.	.	.	.	.
645	SIGNATURE LOAN	2,553.49	107.54	Mar 15, 2013	.	.	.	Y	0	.	P	.	.	.
705	FIX MORT 5 - 30	71,238.83	409.52	Mar 01, 2013	.	.	.	Y	0	Y	.	.	.	.
790	FANNIE MORTGAGE	93,280.81	468.82	Mar 01, 2013	.	.	.	Y	0	.	.	.	.	.

☐ Select Account type desired 000

FR (362) 6/20/13

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

Session 0 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Member Tracker Entry

Account # JOHN G MEMBER

Memo type @

Speaking to Conversations 1

enter conversation here

Save/Continue Page Up/Down ↑ ↓

Phone Inquiry
Save/Continue
Contact
Previous
Filter
First
Last
Next
Household
Additional Signers
Conversations
Print Notice

Date	Jun 20, 2013
Time	13:42:17
Memo type	Left Message
Created by	
Need group	20 A - K (start using 4/1/05)
Task	01 ACH - Direct Deposit
Assigned	92
Contact	JOHN G MEMBER
Follow up	06/21/2013
Complete	N

left message

Shift + Page Up/Down ↑ ↓

i Conversations are ordered newest (First) to oldest (Last).

FR (4580) 6/20/13

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?

Session 0 CU*BASE GOLD Edition - ABC TESTING CREDIT UNION

File Edit Tools Help

Member Tracker Entry

Member account # **JOHN G MEMBER**

Speaking with **JOHN G MEMBER** on **Jun 20, 2013** at **13:45:07**

☒ Update last contact date for this account

☒ Entry just made requires a follow-up

Follow-up date [MMDDYYYY]

Need group **20**

Task # **01**

Person to call back **V**

Contact person **JOHN G MEMBER**

Navigation icons: back, forward, up, down, print, link, info, help, email. FR (3014) 6/20/13

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

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)

The screenshot shows the 'Reassign Tracker Follow Ups' window. The title bar reads 'Session 0 CU*BASE GOLD - RELEASE CONTROL CREDIT UNION'. The window has a menu bar with 'File', 'Edit', 'Tools', and 'Help'. The main area is titled 'Reassign Tracker Follow Ups'. It contains several input fields: 'Reassign follow-ups from Employee ID' with value 'AB', 'to Employee ID' with value 'AE', 'Follow-up date range from' with value 'May 16, 2016', and 'to' with value 'May 16, 2017'. There are also radio buttons for 'No end date' and 'End date'. Below these are radio buttons for 'Follow-ups to include' with options 'Open', 'Closed', and 'All'. A checkbox 'Print list of follow-ups reassigned' is checked. On the right, there is a 'Job queue' section with 'Copies' set to '1' and 'Printer' set to 'P1'. At the bottom, there is a toolbar with various icons and a status bar showing '(6350)'.

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"

The screenshot shows the 'Follow-up EmpID Transfer' window. The title bar reads 'Session 0 CU*BASE GOLD - Follow-up EmpID Transfer'. The main area displays the following information: 'Total # of records found from your selection.' followed by 'Assigning 000000007'. Below this, it shows 'From Teller ID AB' and 'To Teller ID AE'. At the bottom, there is a blue button labeled 'Accept Update'. A toolbar with various icons is at the bottom, and the status bar shows 'F5 (6349)'.