

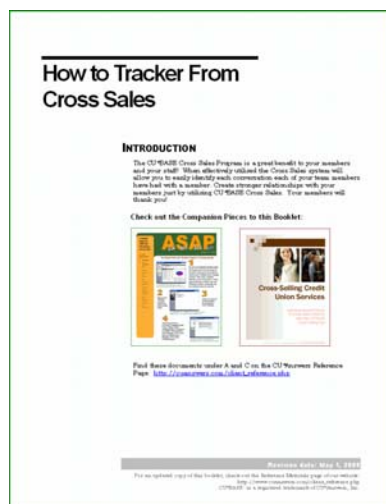
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# How to Work with Member Follow-ups

## 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](http://www.cuanswers.com/pdf/cb_ref/HowtoTrackerfromCrossSales.pdf)



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: August 6, 2009

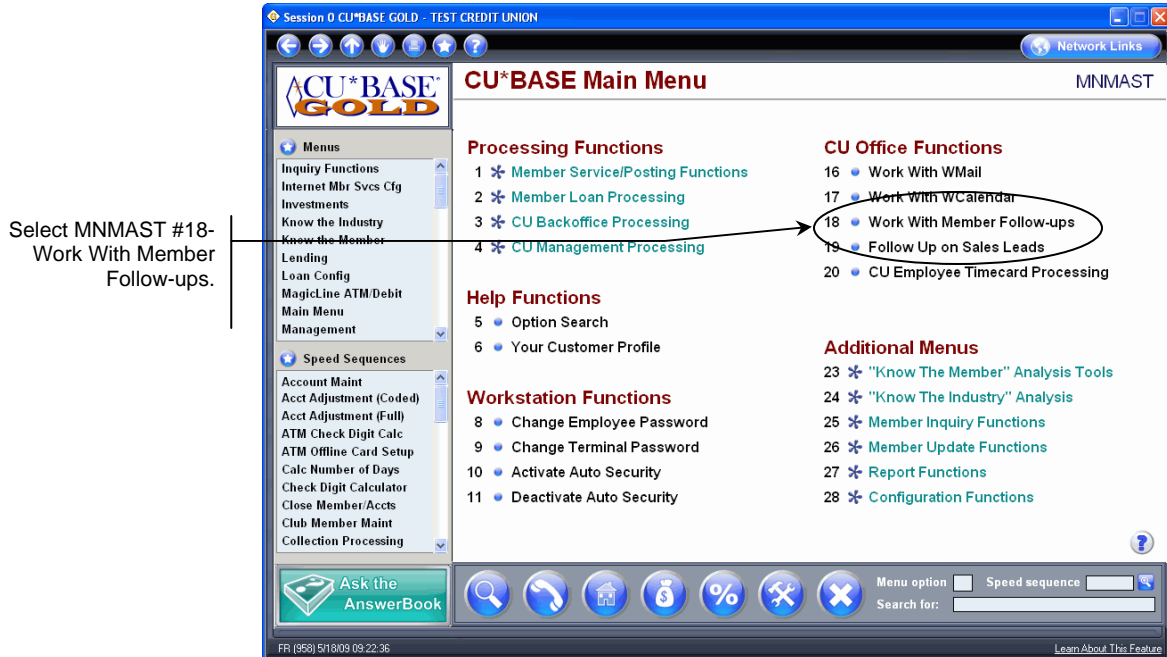
For an updated copy of this booklet, check out the Reference Materials page of our website:  
[http://www.cuanswers.com/client\\_reference.php](http://www.cuanswers.com/client_reference.php)  
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# FINDING YOUR FOLLOW-UP

Begin in CU\*BASE GOLD on the Main Menu (MNMAST).

- This is the first screen in GOLD. If you are not on this menu, select Main Menu on the left side under Menus or type MNMAST into the Speed sequence on the bottom right of the page.

Main Menu (MNMAST)



Select the Work With Member Follow-ups option.

- Type the number 18 in the Menu Option field (lower right of the Menu screen) and press Enter or double-click "18-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 Outstanding Follow-ups button to access the Work with Follow-ups screen while in Inquiry and Phone Operator. If accessing a member's account via Teller, use F17-Outstnd Flw-ups.

Session 1 CU\*BASE GOLD - Search for Active Account Types

**Individual Account**

Account # 1075 Corp ID 01 SSN/TIN  
 Name JOHN Q MEMBER Name ID ME Birthdate Jul. 04, 1940 Verify ID  
 Tiered Service level VIP-PLATINUM  
 Transaction label Self Service Mother's maiden name GOVIER-PATRICK

Contact Information Participation & Configuration

Address 123 MAIN STREET Opened May 18, 1979  
 ANVCITY, MI 49000  
 Home (555) 121-2121  
 Email No Email Address On File  
 Preferred contact method NP = No Preference Selected

Print Envelope Outstanding Follow-ups  
 Tiered Points Cross Sales  
 Transaction Activity Household Statistics  
 Online Banking Secondary Names

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	1,795.56	1,790.56	Jul 23, 2009	.	.	V	.	0	V	V	.	.	V
050	VACATION SAVING	500.00	500.00	Jul 24, 2009	.	.	.	.	0	.	.	.	.	V
110	CHECKING	220.00	220.00	Jul 31, 2009	.	.	.	.	0	.	.	.	.	V
400	IRA CERTIFICATE	10,000.00	0.00	Jan 23, 2012	V	.	.	.	0	.	.	.	.	V
600	SECURED CL END	45,397.79	407.64	Aug 15, 2009	.	.	.	.	0	V	V	.	.	V

Account type desired 000

- If you use Teller to service the member, use F-17-Outstnd Flw-ups instead of using the Outstanding Follow-ups button.

## 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.


CU\*BASE GOLD - Work With Follow-ups

Assigned to employee ID 03 Action taken 0 = Open  
 Account # Show follow-up

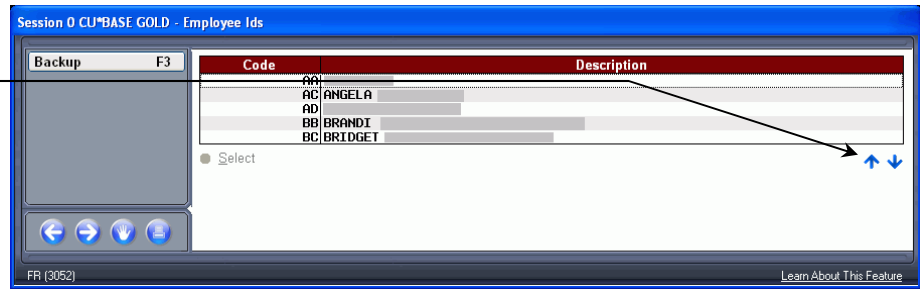
Follow-up Date	Completed	Account #	Contact Date	Type	Follow-up With	Conversation #
Feb 24, 2009	No	3388 000	Feb 24, 2009	ST	RONALD GESSNER	4
Feb 25, 2009	No	3388 000	Feb 24, 2009	ST	RONALD GESSNER	5
Mar 02, 2009	No	3388 000	Feb 24, 2009	ST	RONALD GESSNER	7

Completed Follow-up Inquiry  
 View Cross Sales

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 box "Assigned to Employee ID."

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 blue 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 blue 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:

- View
- Follow Up
- Inquiry

Select the member and use these Options.

Follow-up Date	Completed	Account #	Contact Date	Type	Follow-up With	Conversation #
Feb 25, 2005	No	1000 000	Feb 17, 2005	HS	FRED F. STONE	1
Feb 23, 2006	No	1001 000	Feb 22, 2006	LD	WILMA S. FLINTSTONE	1
Feb 23, 2006	No	1005 000	Feb 22, 2006	LD	BETTY J. RUBBLE	1
Sep 30, 2007	No	1001 000	Sep 28, 2007	LD	WILMA S. FLINTSTONE	1
May 19, 2008	No	3774 000	May 19, 2008	XT	BRAD U PITT	3

# 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 is click Backup or use F3.

# INQUIRE

Hint: If there are existing comments the button will be blue.

**Individual Account**

Account # [REDACTED] Corp ID 01 SSM/TIN [REDACTED]  
 Name MARY A MEMBER Name ID ME Birthdate Jan 03, 1946 Verify ID  
 Code word FLASH  
 Tiered Svc level VIP-PLATINUM Transaction label None Mother's maiden name JONES

**Contact Information** | **Participation & Configuration**

Address 4321 ANYSTREET Print Opened Mar 19, 1983  
 ANYCITY, MI 49000  
 Home (555) 555-5555 Other ph (555) 555-5555  
 Fax (555) 555-5555  
 Email nmember@cuanswers.com

Tiered Svc Points Cross Sales  
 Transaction Activity Household Statistics  
 Online Banking Secondary Names

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	19,257.38	17,952.38	Sep 05, 2008	.	V	.	V	0	V	V	.	.	V
001	BUSINESS/ORG SA	170.00	170.00	Sep 05, 2008	.	.	.	.	0	.	.	.	.	.
003	BUSINESS CLUB	801.25	801.25	Sep 17, 2008	.	.	.	.	0	.	.	.	.	.
014	TRAD IRA SHARE	45.81	45.81	Sep 17, 2008	V	.	.	.	0	.	.	.	.	.
017	MONEY MARKET IN	8,713.43	8,713.43	Sep 17, 2008	.	.	.	.	0	.	.	.	.	.
022	ROTH IRA SHARES	12.00	12.00	Sep 17, 2008	V	.	.	.	0	.	.	.	.	.
030	ESGROW	258.23	258.23	Sep 17, 2008	.	.	.	.	0	.	.	.	.	.

Account type desired 000

FR (362) 91708 10:33:24 [Learn About This Feature](#)

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 F1 or by clicking on the Comments Button. In order to exit this screen either click Exit or F7.

## FOLLOW-UP

Session 3 CUMBASE GOLD - Member Tracker Entry

Member Tracker Entry

Account # [REDACTED] Member BETTY J. RUBBLE  
Memo type BROKEN PROMISE Conversations 1  
Speaking to BETTY J. RUBBLE

Enter Tracker Information Here.

Date  
Time  
Memo type  
Created by  
Need group  
Task  
Assigned  
Contact  
Follow up  
Complete

Phone Inq F2  
Backup F3  
Save/Continue F5  
Contact F9  
Previous F10  
Filter F16  
First F17  
Last F18  
Next F19  
Household F20  
Add Signers F21  
Conversations F22  
Print Notice F23

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

The Follow Up screen is where the Tracker is entered for your new 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. If the Tracker is associated with a Cross Sales Need Group and Task you will see this information here. To see additional conversations, select the left and right arrow keys under the small blue box (on the left).
- Use this screen to type your text or the details important to this conversation that you are having with the member.
- When you are ready choose F5 Save Continue.

## 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.

Session 0 CU\*BASE GOLD - Member Tracker Entry

### Member Tracker Entry

Member account # 17 TONI M GESSNER  
Speaking with TONI M GESSNER on Apr 10, 2009 at 17:59:59

Update last contact date for this account  
 Entry just made requires a follow-up

Follow-up date [MMDDYYYY]

Need group 01  
Task # 02  
Person to call back 76  
Contact person TONI M GESSNER

Backup F3

vWJ (3014) 4/10/09 17:59:59 [Learn About This Feature](#)

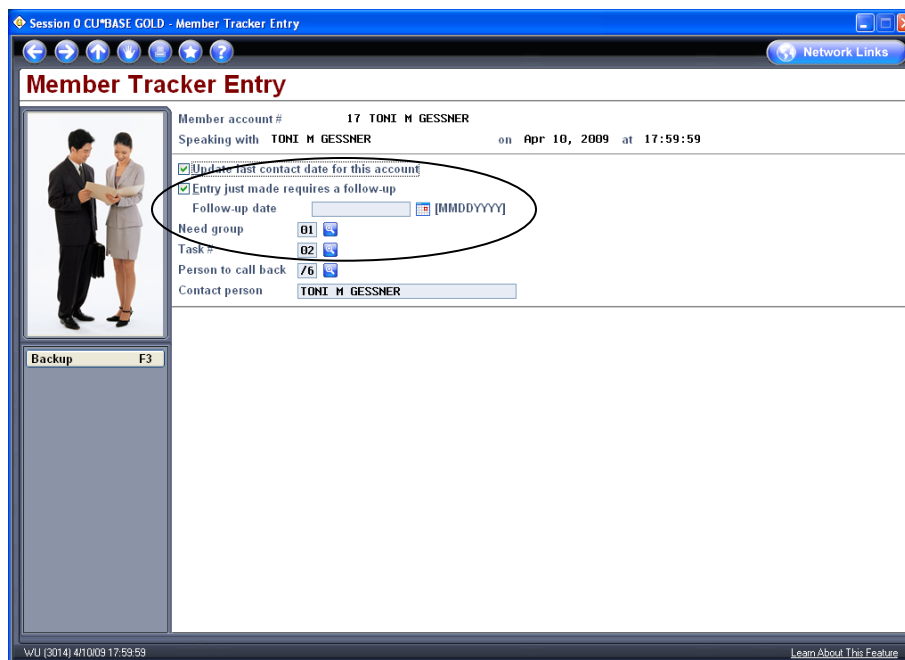
- Always leave the first box “Update last contact date for this account” checked.
- If entry requires a follow up, leave “Entry just made requires a follow-up” checked. (Uncheck it if one is not required.) Enter the follow-up date or use the calendar next to the field to select the date.
- The Sales 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 changes 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.”

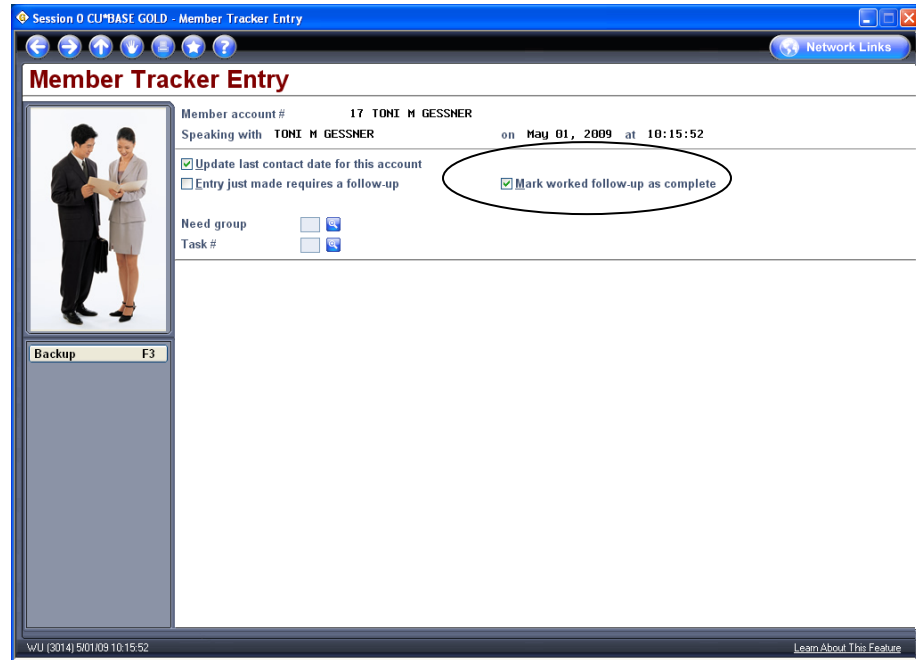


The screenshot shows a software window titled "Session 0 CU\*BASE GOLD - Member Tracker Entry". The main content area is titled "Member Tracker Entry" and contains the following information:

- Member account #: 17 TONI M GESSNER
- Speaking with: TONI M GESSNER on Apr 10, 2009 at 17:59:59
- Update last contact date for this account
- Entry just made requires a follow-up
- Follow-up date: [ ] [MMDDYYYY]
- Need group: 01
- Task #: 02
- Person to call back: /6
- Contact person: TONI M GESSNER

A red oval highlights the "Entry just made requires a follow-up" checkbox. On the left side of the window, there is a "Backup" button and a "F3" key indicator. The bottom status bar shows "WU (3014) 4/10/09 17:59:59" and a "Learn About This Feature" link.

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:

- Work Member Follow-Ups can also be found on CU\*BASE Menu MNTRAK
- Menu Access to MNMAST 18 and/or MNTRAK 1-Work with Member Follow-Ups must be granted using Employee Security found in the CU\*BASE Menu MNMGMT.
- 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.
- For more information regarding Working Sales Trackers from Cross Sales see:

[http://www.cuanswers.com/pdf/cb\\_ref/HowtoTrackerfromCrossSales.pdf](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 visit

[http://cuanswers.com/pdf/cb\\_ref/C-Cross-selling.pdf](http://cuanswers.com/pdf/cb_ref/C-Cross-selling.pdf)

found in the CU\*BASE Reference Page.