The purpose of this process is to assist with better tracking and follow through to support successful cross sales.

Goal is to connect the member to a loan officer or MSR (pending topic) during the same visit or phone call.

*Note- this process may be updated as feedback is received.

Process:

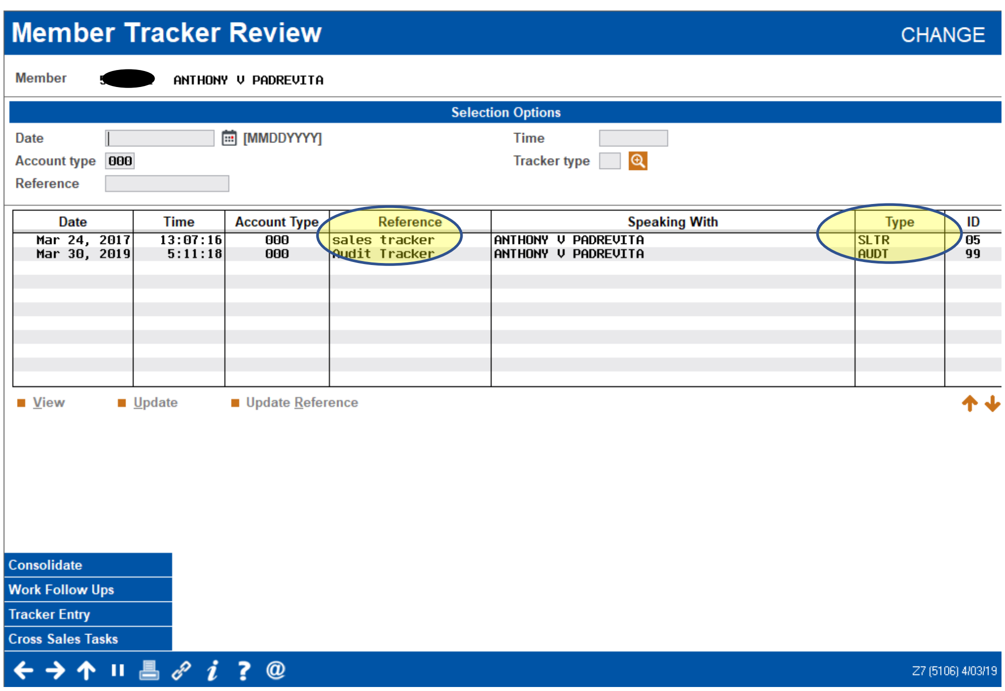
1. Enter Sales Tracker for the referral on members account:
    a. Sales Trackers are stored under the 000 Account Inquiry screen.
    b. Select **Tracker Review** at the bottom left of the screen
    c. Majority of memberships already have a Sales Tracker set up on the account (screen shot 1)
        i. Reference= Sales Tracker
        ii. Type= SLTR
    d. Select the Sales Tracker record and chose Update
        i. Memo Type will be based on <u>where</u> the conversation was initiated
            1. Memo Types Descriptions that start with **IN**- are used when the member came in, or called in.
                a. Code: MG = IN Refer 2 Loan
                b. Code: MM= IN Refer 2 MSR
                c. Codes: R1-S1= Vendor Referrals (IN & PH)
            2. Memo Type Descriptions that start with **PH**- are used when staff makes an outbound call from a target list.
                a. Code: RE = PH-Refer 2 Loan
                b. Code: RM= PH Refer 2 MSR
                c. Codes: R1-S1= Vendor Referrals (IN & PH)
        ii. Enter details of the conversation and request (be as specific as possible to support yourself and your team in knowing what the member needs are when the follow up is reviewed- including best time of day for follow call if needed).
        iii. Save/Continue
    e. Entry just made requires a **follow-up** (screen shot 2)
        i. Follow-up date:
            1. Use today's date if member was connected to loan officer or MSR during same visit, or would like a call back on the same day.
            2. If member states a specific day for a follow up call, enter that date.
            3. If making a refer to a vendor, put a later follow up date.
        ii. Need group (category) and Task # (product)- select the appropriate group and products cross sold
        iii. Person to call back:
            1. Assign the employee that you referred the member to.
            2. If member not immediately connected to an employee, Select **LN** for the Loan Department

        3. Assign yourself if the referral was made to an external provider so you can complete your own follow through.
    iv. Contact Person- updated if needed (maybe it's the joint owner that will be contacted).

2. Referred Staff Process:

  a. Process the referral request as normal.
  b. Update the Sales Tracker entry through your Work with Follow-Ups (tool #5)
        1. Select the account that was just worked and then chose Follow-Up
    ii. Memo Type will be based on the action or discussion that you completed.
        1. AP-Approved
        2. DN-Denied
        3. Or, any **IN-** memo types
    iii. If the service was not opened during the member contact, enter details of the conversation to support follow up (will think about it, will submit app, reasons not qualified, etc.)
    iv. Save/Continue
    v. If Approved, or there is member interest, Entry requires a follow-up- (Denials do not need a follow-up)
        1. Follow-up date- Set date based on when you will follow up.
        2. Need group and Task #- select the appropriate group & product
        3. Person to call back- Select yourself
    vi. Continue the follow up tracking process until the conversation is complete (opened new service, or member has said not interested).

Screen Shot 1



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Screen Shot 2