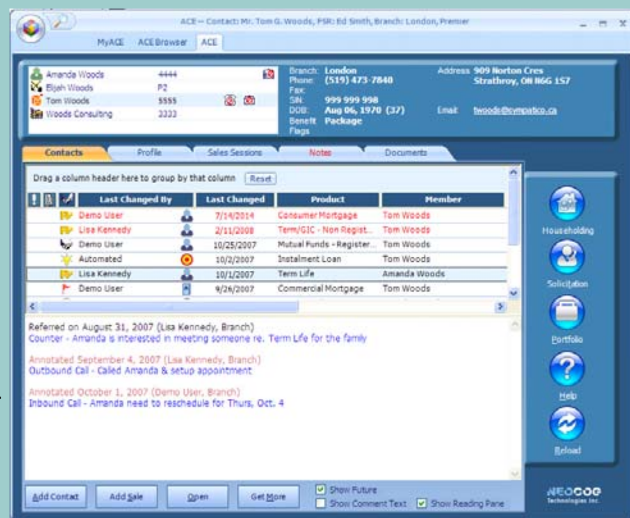
Going for Gold: Prospecting in ACE

Introduction

Over the many years that our clients have been using ACE they have been giving us valuable feedback and suggestions for enhancements to ACE to improve its functionality for you the user. As a result of that valuable feedback ACE just keeps on getting better and we are committed to making it the best for both our current and future users.



New "Reading Pane" view of ACE Contacts

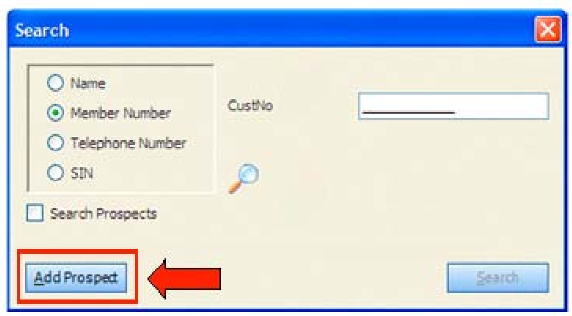
Neocog Technologies began 2008 with the introduction of ACE 5.0. The most visible changes were to its interface and the introduction of EMMA which were featured in the previous ACE Insider. This edition of the ACE Insider will begin by highlighting the new Prospects functionality in ACE. This functionality allows users to enter information into ACE for individuals and organizations that are not yet members of the credit union.

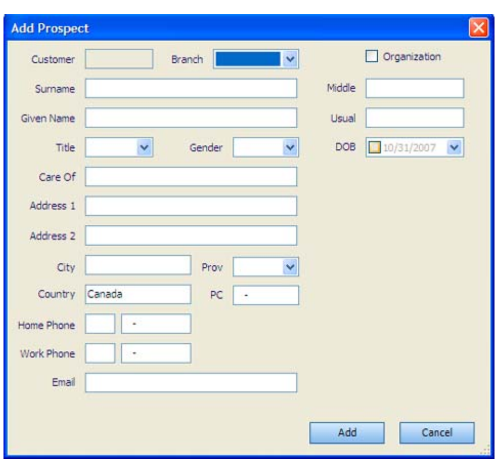
In addition, we will highlight some other exciting enhancements that were made to ACE as well as some new enhancements to the Campaign Loader.

You've received this communication because you're a leader at a credit union that is part of the family of users of Neocog software, especially ACE. Over the past few years, many new features have been added to ACE. We want to tell you about them if you haven't heard, remind you if you've forgotten, and clarify what you may have been left uncertain about. If there are other staff at your credit union who could benefit from this publication as a means of keeping up to date, please send email addressed to info@neocog.com.

Prospects

ACE has always been a valuable tool in tracking sales opportunities for existing members, however, until now there have been limitations on what ACE could do for non-member sales opportunities. The prospects functionality was added to ACE because organizations wanted a consistent process between how staff dealt with both member and non-member opportunities. By allowing non-members to be added, the ACE processes such as notification and reporting could include these prospect opportunities. In addition, prospects can be batch loaded into ACE to be worked and tracked as part of an organizations "new acquisition" campaign.

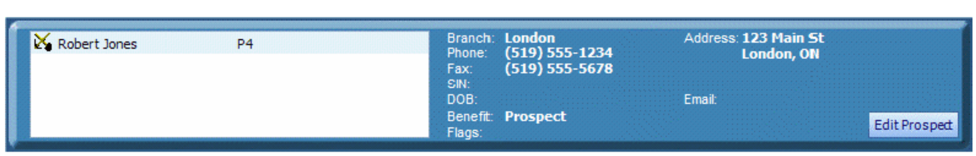




Adding a Prospect

In situations where a non-member comes into your branch, calls your call centre or is referred to you by one of your members for a particular product or service, you can now record your contacts with this prospective member by adding this prospect directly to ACE without having to set them up in your banking system first. This can be accessed through ACE's new "Search" screen (shown above).

From the "Add Prospect" form (shown left) you can add either an individual as a prospect or a business or organization. This can be done by checking off the box in to top right corner of the form. On this form you can fill out any of the personal information your prospective member is willing to give you. When you are done simply click on the "Add" button at the bottom of the form. Once you have clicked the "Add" button a new ACE record is created (shown right). Prospects can be identified by the "pick & shovel" icon beside their name.



Campaign Loader: Deleting Active Campaigns

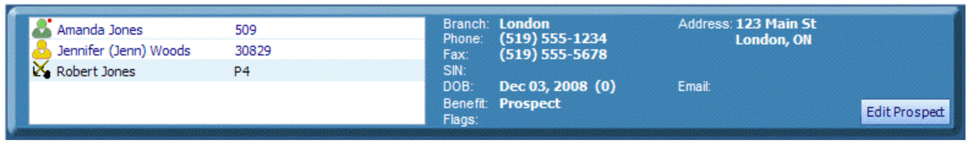
Prior to ACE 5.0 when a campaign was added to ACE it was not possible to delete it. This became particularly problematic if there was an error in the campaign or if the campaign had to be cancelled.

Functionality has been added to the Campaign Loader's "Campaign Maintenance" window so that administrators now have the ability to delete an active campaign if needed.

Moving a Prospect

Once this prospect is entered into ACE you can treat it the same as any other member in ACE, allowing you to add contacts, documents, etc.. As you can see by this example, prospects can be moved into households as well.

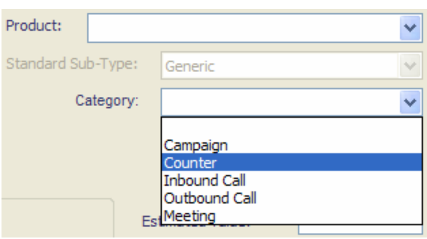
Once you turn your non-member prospect into a member and create their profile in the banking system ACE will allow you to transfer that prospect contact record to their new member record.

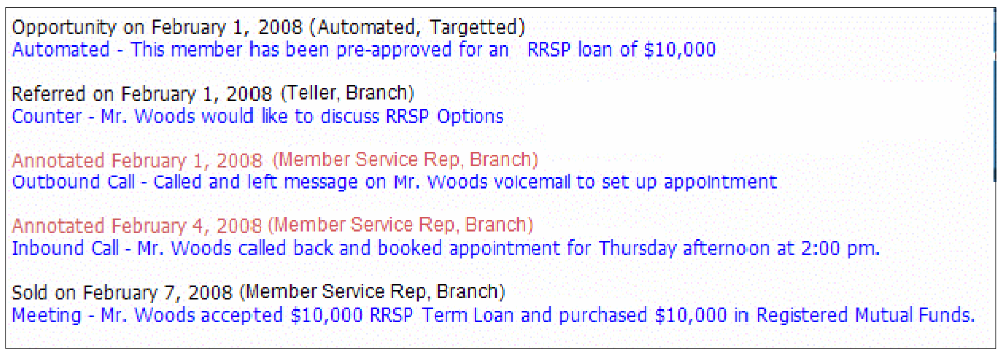


"Category" Field Added to Contact Details View

In order to follow the sales progression in more detail and track each step of the sales process, a "Category" field has been added to the ACE 5.0 "Contact Details" view. These categories are definable by the organization, and can be made mandatory or not. For example, if you enter a "Sales Contact", you will now have the option to select the "Category" of "Sales Contact" such as, Meeting, Outbound Call, Inbound Call, Counter, Email, etc.. Every time a user changes the state of the contact or adds an annotation they will have an opportunity to enter the "Category", this includes each annotation as well. The "Category" value entered will be displayed in the "Contact Details" window.

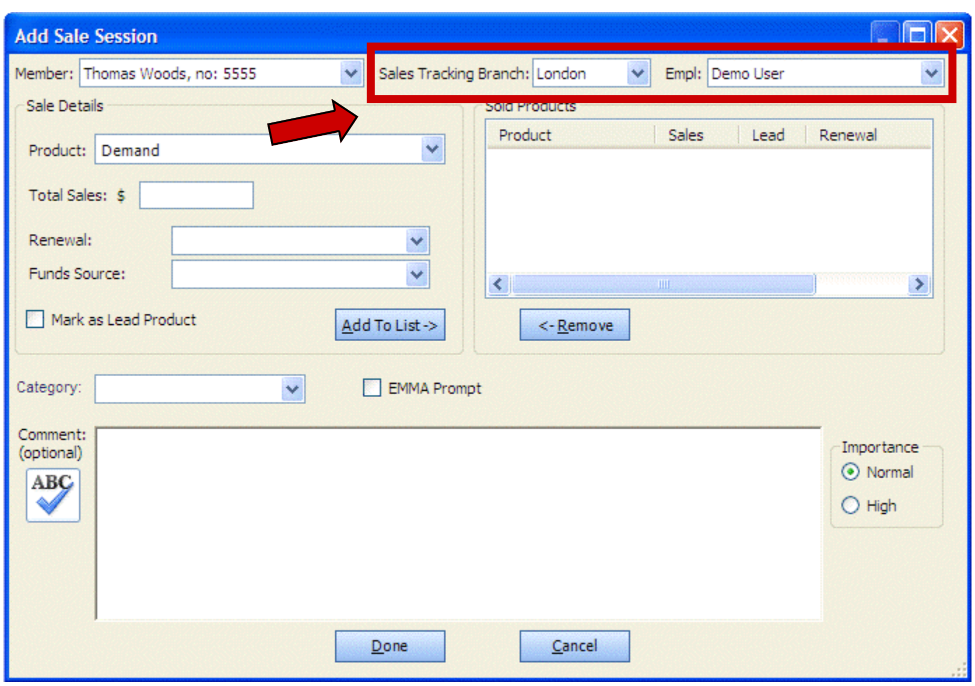
Here is an example of how this looks on the "Add Contact" form and in a "Sales Contact":





Ability for Alternate User to Add a Sale for Someone Else

Previously in ACE you could not enter sales tracking information for someone else. Now users have the ability to enter a sale for a different user. While the authorship of the contact will be for the user entering the contact, the sales information can be assigned to another user. For example, a staff member is away on vacation and you want to enter a sale for them, you now have that ability to track that sale and attach their name to that sale.



Campaign Loader: Campaign Start Date Can be Current Date

Previously in ACE, when a campaign was loaded through the "Campaign Loader", it had to be loaded with a future date that was at least a minimum of one day into the future. This limitation was in place because ACE processed campaigns through an overnight batch process.

Now when loading a campaign into ACE 5.0, organizations have the option to start the campaign the same day they load it rather than a minimum of one day into the future. ACE now runs campaigns in "real time".