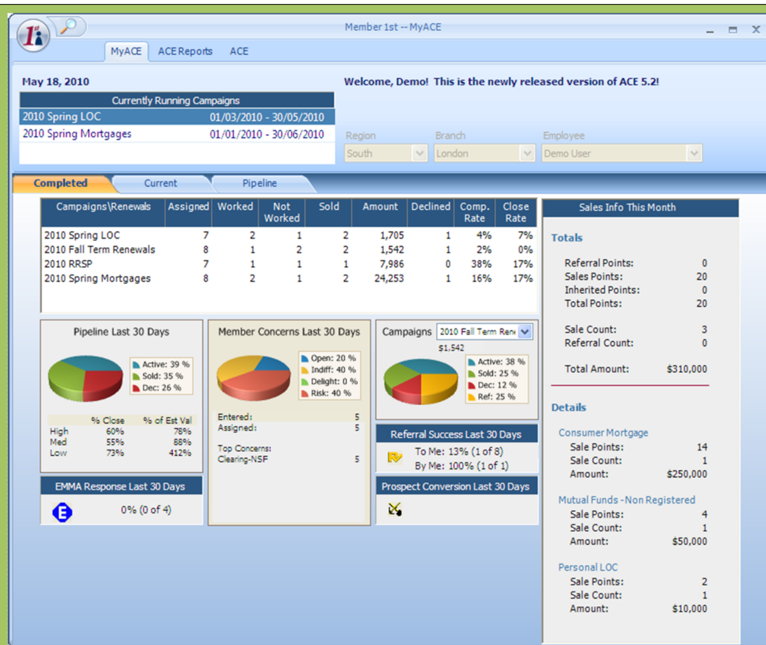
ACE insider

Summer 2011

Exploring the New MyACE

Introduction

MyACE has also seen some significant changes since ACE 5.2. With the added functionality over the past few releases it was thought that it would be good for staff to see what they had done (completed) in ACE, what they were currently working on and what opportunities were coming down their sales pipeline.

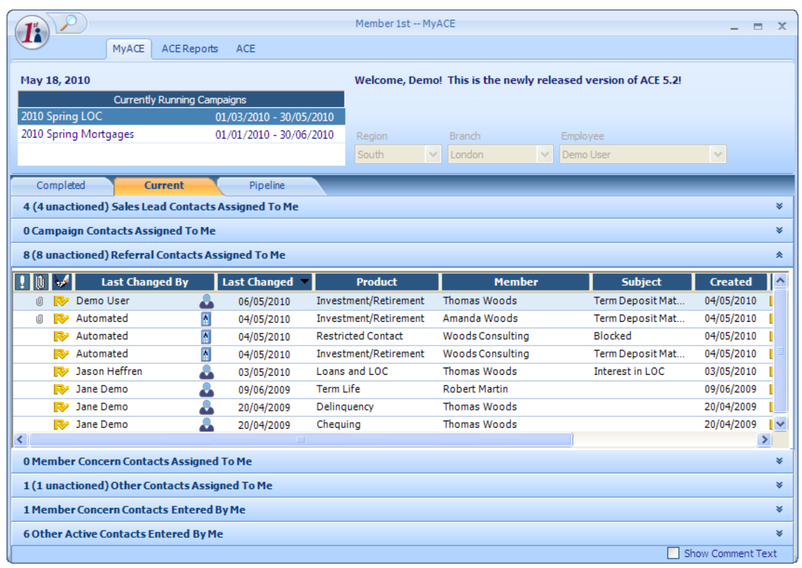


From this logic three distinct views were created for users and management. The first is the *Current* view which is a list of contacts that have been assigned by category. The second is the *Completed* view (as shown here) which is a dashboard view of the different activities that have been completed in ACE. The final view is the *Pipeline* view. This gives users a quick snapshot of the estimated value amounts of the pipeline contacts that have been entered into ACE, broken out by how far the projected close date is and the probability of success.

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 an email addressed to info@neocog.com.

Current MyACE Tab

This My ACE screen displays:



Welcome Area - This is a welcome area which displays a customizable message

Currently Running Campaigns – This is a list of currently running campaigns (which may include links to their information and reporting web pages)

Sales Lead Contacts Assigned to Me - This area displays a complete list of Contacts that have been assigned to you both from individuals or from a batch load. (Simply click the header bar to access)

Campaign Contacts Assigned to Me - This area displays a complete list of Campaign Opportunity Contacts that have been assigned to you from a batch load. (Simply click the header bar to access)

Referral Contacts Assigned To Me – This area displays a complete list of Referral Contacts that have been assigned to you both from individuals or from a batch load. (Simply click the header bar to access)

Member Concern Contacts Assigned to Me - This area displays a complete list of Member Concern Contacts that have been assigned to you. (Simply click the header bar to access)

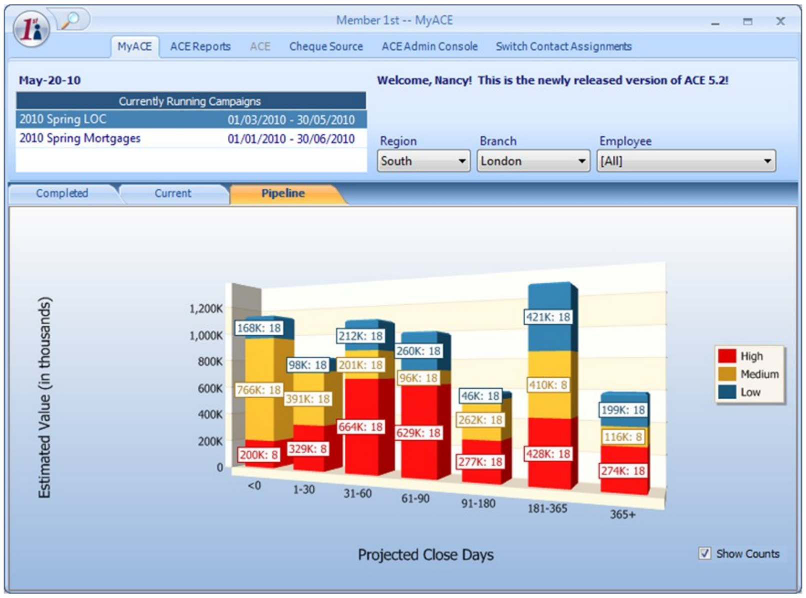
Other Contacts Assigned To Me – This area displays a complete list of Standard Contacts that have been assigned to you. (Simply click the header bar to access)

Member Concern Contacts Entered By Me – This area displays a complete list of Member Concern Contacts that have been entered by you. (Simply click the header bar to access)

Other Active Contacts Entered By Me – This area displays a complete list of active Contacts that have been entered by you. (Simply click the header bar to access)

See What You Want to See

The headings in this list are completely customizable. What you see displayed here are the default groups as originally set-up in ACE. If you want to have your contacts grouped differently then ACE can be configured to show what you want to see.



Pipeline MyACE Tab

The "Pipeline" tab contains this pipeline chart. Here users can get a quick snapshot of the "Estimated Value" amounts of the pipeline contacts that have been entered into ACE, broken out by how far the "Projected Close Date" is, and the "Probability of Success". Based on user privilege users can also view the pipeline chart from any region, branch or employee that they have access to. Users can click on the chart and be taken directly to the detailed Pipeline Report in the ACE Reports Tab.

Campaign Hyperlink

Your organization may have a web-page or document that is directly associated with a marketing campaign that has been executed through ACE. ACE can be configured to allow users access by adding a hyperlink to the campaign name.

If you look at the campaign name in the Currently Running Campaigns area and it is underlined then a hyperlink exists. To access the web-page or document simply click on the link.

Completed MyACE Tab

This elaborate dashboard view has been broken down into the main elements of ACE in order to provide users with a very quick but powerful snapshot of the items they have recently completed. Based on user privileges, users can view all this information at any level of detail, whether by Region, Branch or Employee.

Campaigns - The top section displays a summary of all active or recently completed Campaigns or Renewals that were originally batch-loaded through the Campaign Loader. For each entry, users see the number of contacts that were assigned, and of those, whether they have been worked (actioned) or not worked (unactioned), and of the worked ones, how many have been sold or declined. There is also summary completion and close rates, and additional analysis is available using the Campaign graphing just underneath where users can select from the available campaigns and observe the status of each. These two views should provide users with a very clear understanding of the progress and success of any marketing efforts loaded through the Campaign Loader.

Sales Info - The "Sales Information This Month" section at the right is a scoreboard or summary of all the sales and referrals entered into ACE for the current month.

The following 5 sections all represent data for the last 30 days:
Pipeline - Here users see all of the pipeline contacts that closed during the past 30 days, broken out by whether the pipeline contact was sold, declined, or is still being worked on, along with close percentages and how much of the estimated value was reached.

EMMA- The EMMA response tells us the rate at which prompting contacts are being responded to by staff.

Member Concerns - The Member Concerns report tells users the number and status of concerns entered in the last 30 days, along with what the top concerns have been during this period. As you can see, it's very easy to keep an eye on what the various member issues are at the different branches.

Referrals - Referral Success gives users an idea of the quality of referrals that are being made, whether the referrals are sent *To Me* from someone else, or originally created *By Me*.

Prospects - The Prospect Conversion summary shows users the rate of prospective members entered into ACE that have actually gone on to become members of the Credit Union.