Quick-start Guide:
Using the Telemarketing Application

Introduction

This Quick-start Guide will take you through, step-by-step, the actions required to execute an outbound call using the Telemarketing (TM) application. The Guide is intended for beginners with little to no experience with using the TM application.

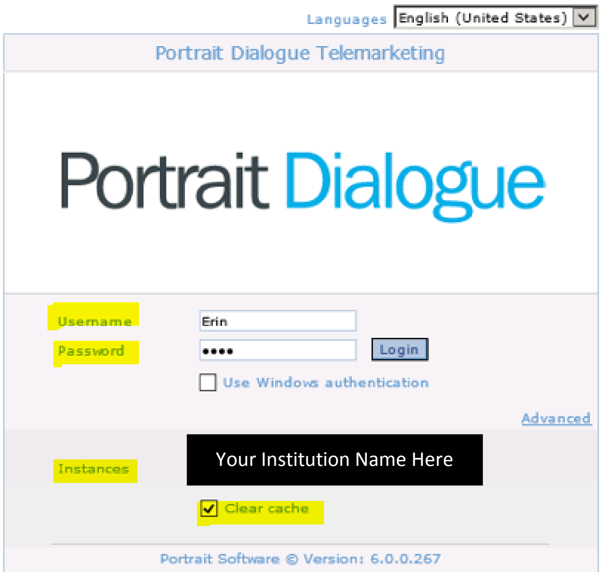
The example used in this Guide is the TM project associated with the Turning 18 Dialog, however the principles are applicable across all other TM projects.

Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – sjfowler@spark.com.au

Stage 1: Access the Telemarketing application

1. Go to your Windows desktop and double-click on the TM icon, pictured right.

2. You will be presented with a login screen. Make sure the 'Clear cache' box is checked and that your 'Instance' is selected.



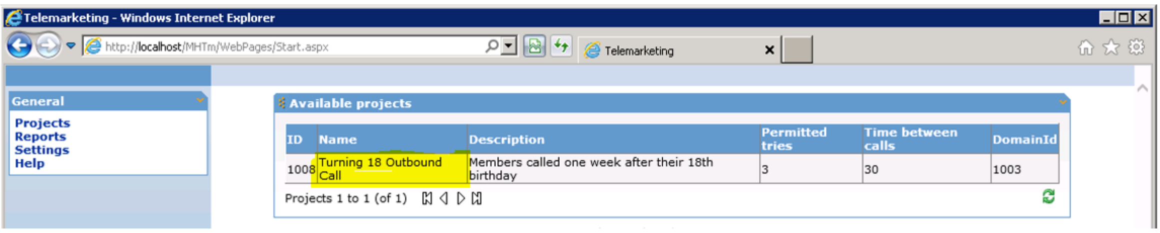
3. Log into the application using the following login details -

   Username: (enter your first name)

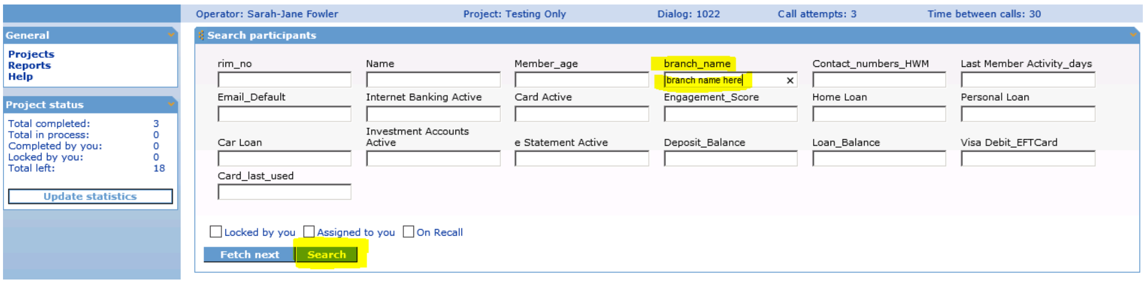
   Password: (enter your surname)

Stage 2: Select a member to call

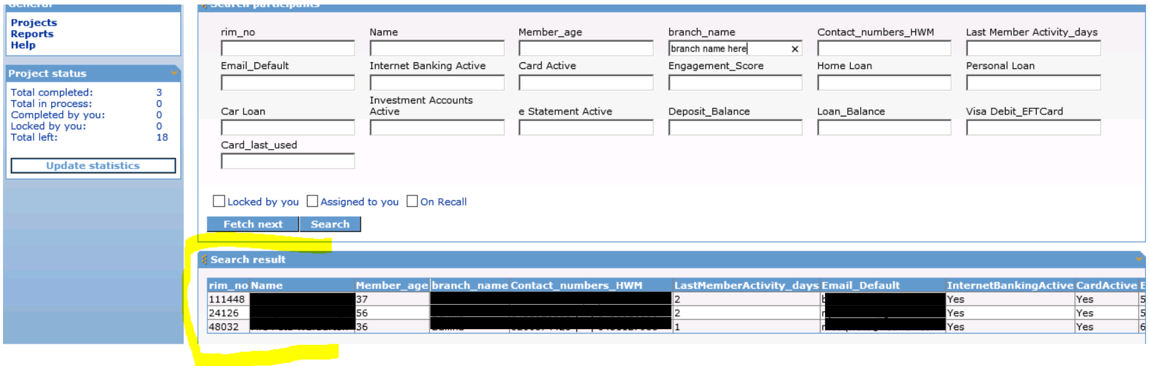
1. You will be presented with a screen that lists all current TM projects. Double-click on the one you are working on.



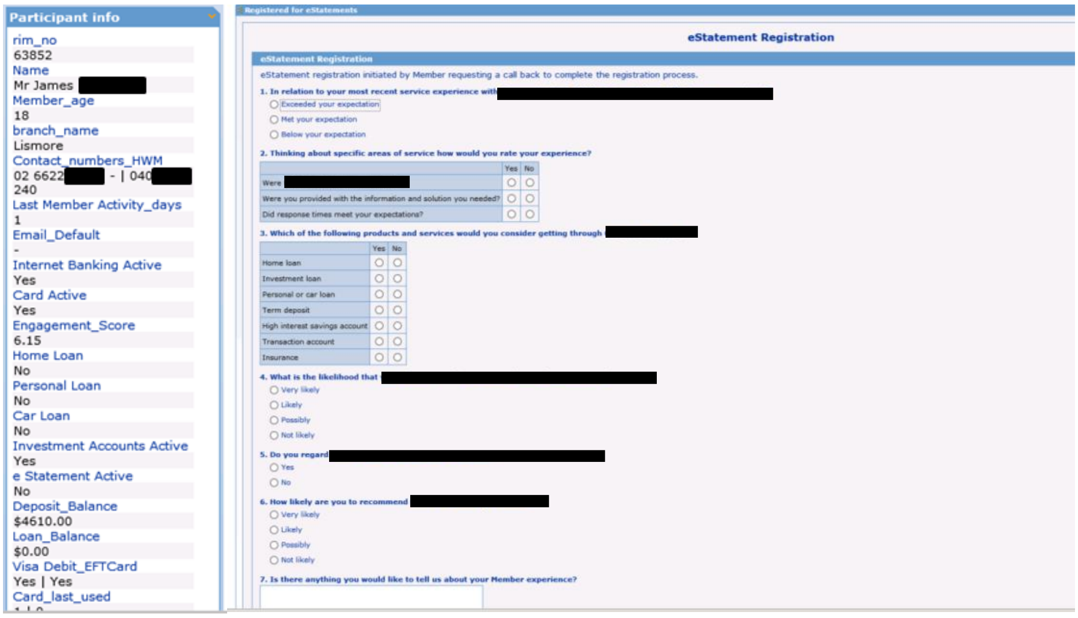
2. You will then be presented with a screen prompting you to search for a member. Simply type in your branch location then click 'Search'. Example pictured below:



3. A list of members will be presented. Double-click on one to select it.



4. Your screen now displays the member details on the left and the questionnaire on the right. *(The 'Participant info' section on the left, is designed to provide you with a profile of the member with the intent to start a conversation. If you notice information missing or products that the member may not have but may be suitable for, you have the opportunity to ask).* You can now make the phone call.



Stage 3 (option 1): Call Successful – complete questionnaire

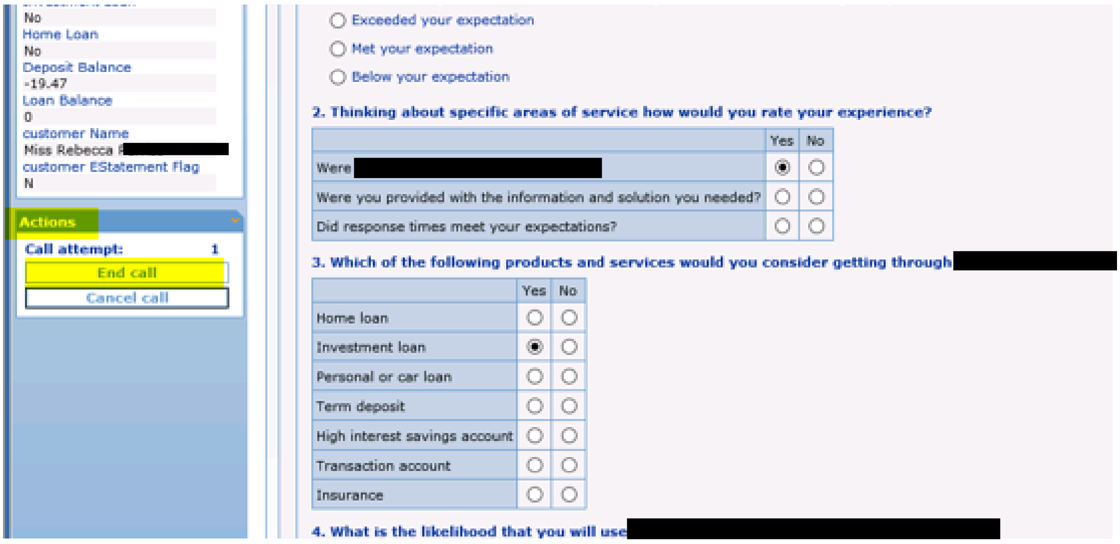
1. As you are talking with the member, complete the questionnaire with their responses. Keep scrolling down for further questions.

2. Once the questionnaire is complete you can click 'Forward'. The application will now save the customer's answers and return you to the search window.

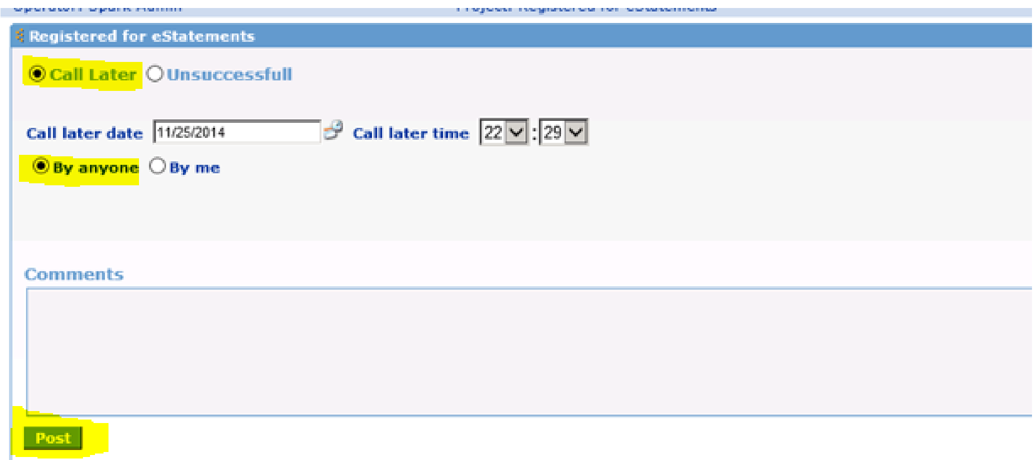
Stage 3 (option 2): Set member call back

It is important to set and assign a call back to a member that you could not get a hold of. This puts the member back in the call queue then reminds you, or other team member, to call this member back at a specified time.

1. On the left hand side of the screen select 'End Call' in the Actions menu.

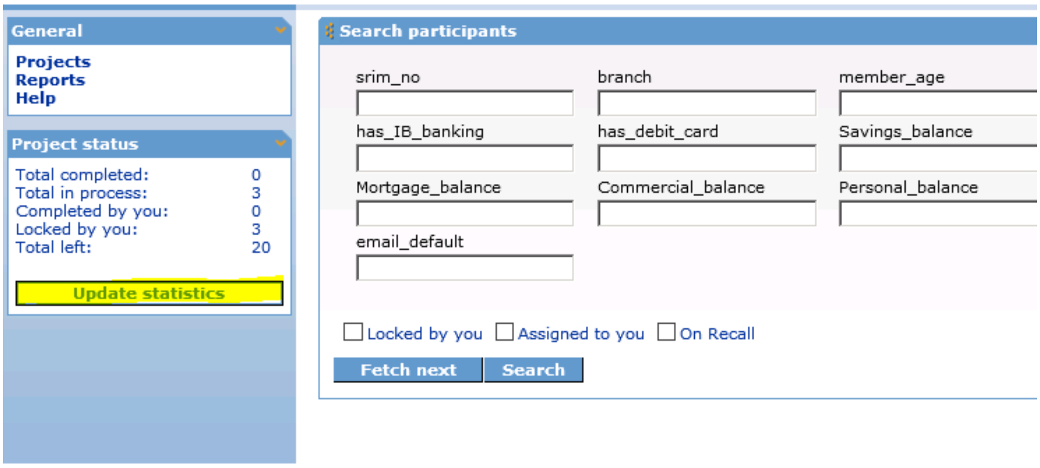


2. Select the 'Call Later' button and fill in the date and time of the call back. Select either 'By anyone', or 'By me'. Enter any additional comments then click 'Post'.



Stage 4: Update statistics

1. Once you have either completed the questionnaire or selected an appropriate reason for an unsuccessful call, you will be redirected to the first member search page. On the left hand menu, click ‘Update Statistics’.   This will now reflect how many calls are left in the queue.



CONGRATULATIONS! You have now completed your first outbound call using the Telemarketing application. Simply repeat stages 2-4 to work through the call queue for your project.