

# 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](mailto: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.

Portrait Dialogue Telemarketing

Languages English (United States)

Portrait Dialogue

Username: Erin

Password: [masked]

Login

Use Windows authentication

Advanced

Instances: Your Institution Name Here

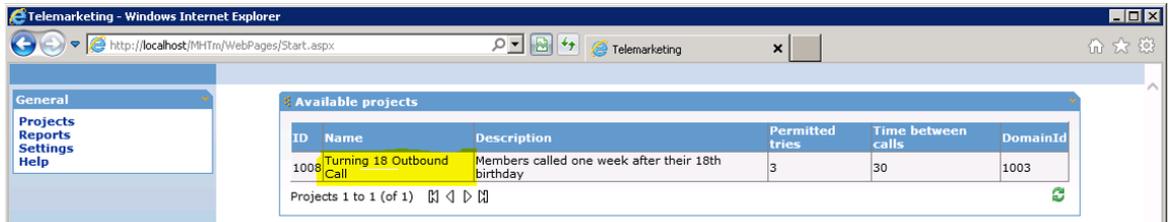
Clear cache

Portrait Software © Version: 6.0.0.267

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

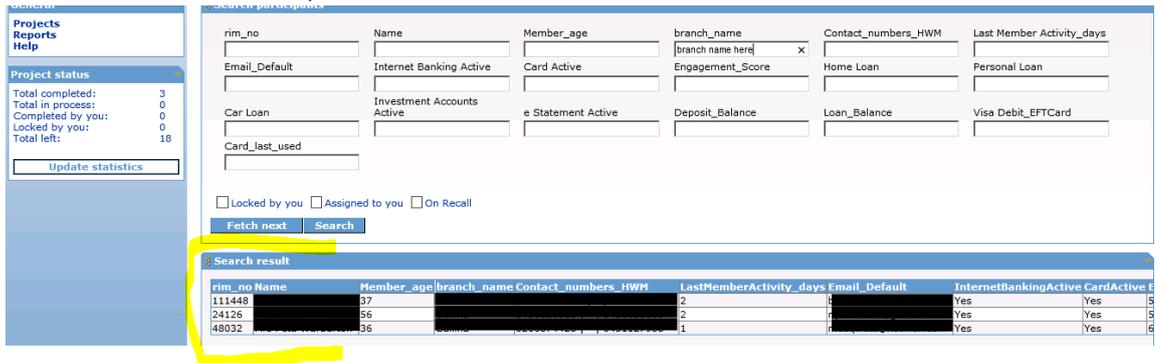
1. You will be presented with a screen that lists all current TM projects. Double-click on the one you are working on.



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.

**Participant info**

rim\_no  
63852

Name  
Mr James [REDACTED]

Member\_age  
18

branch\_name  
Lismore

Contact\_numbers\_HWM  
02 5622 [REDACTED] | 04 [REDACTED]  
240

Last Member Activity\_days  
1

Email\_Default  
-

Internet Banking Active  
Yes

Card Active  
Yes

Engagement\_Score  
6.15

Home Loan  
No

Personal Loan  
No

Car Loan  
No

Investment Accounts Active  
Yes

e Statement Active  
No

Deposit\_Balance  
\$4610.00

Loan\_Balance  
\$0.00

Visa Debit\_EFTCard  
Yes | Yes

Card\_last\_used  
4.1.0

**eStatement Registration**

**eStatement Registration**

eStatement registration initiated by Member requesting a call back to complete the registration process.

1. In relation to your most recent service experience with [REDACTED]

Exceeded your expectation

Met your expectation

Below your expectation

2. Thinking about specific areas of service how would you rate your experience?

	Yes	No
Were [REDACTED]	<input type="radio"/>	<input type="radio"/>
Were you provided with the information and solution you needed?	<input type="radio"/>	<input type="radio"/>
Did response times meet your expectations?	<input type="radio"/>	<input type="radio"/>

3. Which of the following products and services would you consider getting through [REDACTED]

	Yes	No
Home loan	<input type="radio"/>	<input type="radio"/>
Investment loan	<input type="radio"/>	<input type="radio"/>
Personal or car loan	<input type="radio"/>	<input type="radio"/>
Term deposit	<input type="radio"/>	<input type="radio"/>
High interest savings account	<input type="radio"/>	<input type="radio"/>
Transaction account	<input type="radio"/>	<input type="radio"/>
Insurance	<input type="radio"/>	<input type="radio"/>

4. What is the likelihood that [REDACTED]

Very likely

Likely

Possibly

Not likely

5. Do you regard [REDACTED]

Yes

No

6. How likely are you to recommend [REDACTED]

Very likely

Likely

Possibly

Not likely

7. Is there anything you would like to tell us about your Member experience?

### 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.

The screenshot shows a call management interface. On the left, there is a sidebar with a list of actions. The 'End call' button is highlighted in yellow. The main area displays a questionnaire for a customer named Miss Rebecca. The questionnaire includes sections for 'Thinking about specific areas of service how would you rate your experience?' and 'Which of the following products and services would you consider getting through...'. The 'End call' button is highlighted in yellow.

	Yes	No
Were [redacted]	<input checked="" type="radio"/>	<input type="radio"/>
Were you provided with the information and solution you needed?	<input type="radio"/>	<input type="radio"/>
Did response times meet your expectations?	<input type="radio"/>	<input type="radio"/>

	Yes	No
Home loan	<input type="radio"/>	<input type="radio"/>
Investment loan	<input checked="" type="radio"/>	<input type="radio"/>
Personal or car loan	<input type="radio"/>	<input type="radio"/>
Term deposit	<input type="radio"/>	<input type="radio"/>
High interest savings account	<input type="radio"/>	<input type="radio"/>
Transaction account	<input type="radio"/>	<input type="radio"/>
Insurance	<input type="radio"/>	<input type="radio"/>

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'.

The screenshot shows a call management interface with a 'Call Later' form. The 'Call Later' radio button is selected and highlighted in yellow. The form includes fields for 'Call later date' (11/25/2014) and 'Call later time' (22:29). The 'By anyone' radio button is selected and highlighted in yellow. There is a 'Comments' text area and a 'Post' button highlighted in yellow.

## 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.

The screenshot displays a web application interface with a left-hand navigation menu and a main content area. The navigation menu includes 'General', 'Projects', 'Reports', and 'Help'. Under 'Project status', the following statistics are listed: Total completed: 0, Total in process: 3, Completed by you: 0, Locked by you: 3, and Total left: 20. A yellow 'Update statistics' button is located at the bottom of this menu. The main content area is titled 'Search participants' and contains several search filters: srim\_no, branch, member\_age, has\_IB\_banking, has\_debit\_card, Savings\_balance, Mortgage\_balance, Commercial\_balance, Personal\_balance, and email\_default. Below these filters are three checkboxes: 'Locked by you', 'Assigned to you', and 'On Recall'. At the bottom of the search area are two buttons: 'Fetch next' and 'Search'.

**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.**