

# Telemarketing :



**InterAcct**  
SOFTWARE PTY LTD

Telemarketing is an optional Software Module as part of InterAcct's Sales and Marketing system.

It allows you to import raw data files of names (or input them), and then to 'process' those names via a Telemarketing Call Campaign. The system analyses Call Results from this activity, and records follow up dates.

There are also menu links into Prospect Profiling (questions & answers about the current status of a Prospect), plus being able to record what Products/Services are being used, or needed. Further menu links allow you to produce a personalised letter, or quotation – all with a minimum of Operator keystrokes.

**Telemarketing**

**Menu**

1. Start : Telemarketing
2. Setup : Telemarketers
3. Setup : Activities - Scripts
4. Setup : Call Result Codes
5. View : Follow Ups
6. View : Call Summary
7. View : Daily Activities
8. Imported File Conversion

**Video**

**Manual**

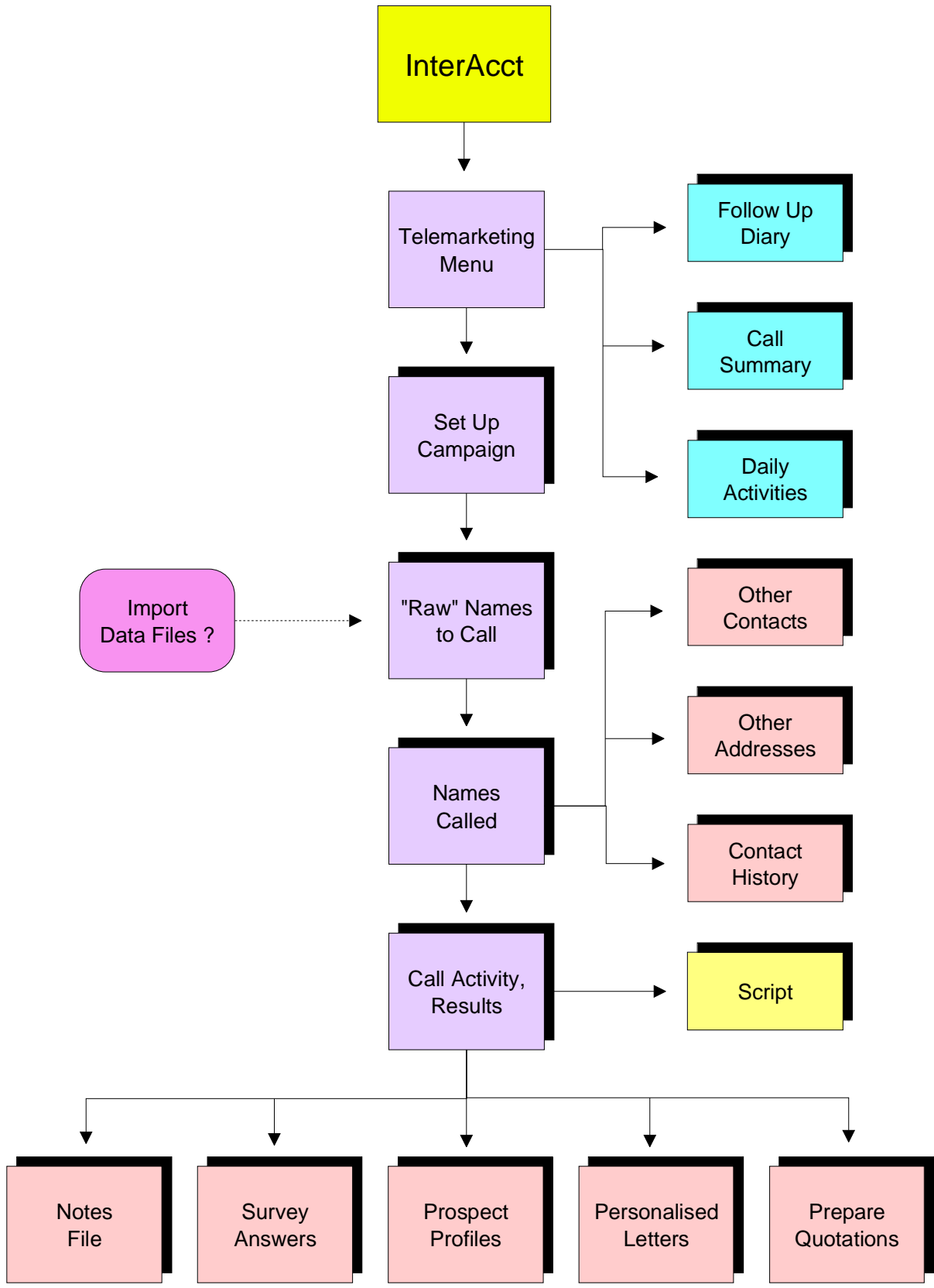
**Form help** | Field help | Origins | Industry Types

Welcome to the InterAcct Telemarketing system.

Step 1 : Add your Telemarketing People - Menu [2]  
Step 2 : Set up your Telemarketing Activities - Menu [3]  
Step 2a : Create your Telemarketing Scripts for each Telemarketing Activity type - Menu [3], [1]  
Step 3 : Set up your Telemarketing "Results" classifications - Menu [4]  
Step 4 : Start Telemarketing - Menu [1] (or click on the "Telemarketing" button)

You can view various Visual Search Enquiries after completing your Telemarketing activities.  
See under Menus [5], [6], and [7].

To import foreign files into the system - see Menu [8]. Optional InterAcct Software Module.



The screenshot shows the InterAct Demo software interface. The main window is titled "InterAct Demo - [TELEMARKETING CAMPAIGNS - display ]". It features a menu bar (File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help) and a toolbar with various icons. The main area contains a form for campaign settings:

- Survey: SALES
- Origin: T/MARKET
- Industry: MANUFACTURING
- Names Called #: 4
- Call Activities #: 4

Below the form is a "Menu" box with the following options:

1. Raw Names to Call
2. Print Raw Names List
3. Search : Names Called
4. Names - to be called
5. Names - no results yet
6. Suburbs & Post Codes
7. Telemarketing Help
8. Suburbs & Post Codes

There are also "Video" and "Manual" buttons. At the bottom, a window titled "RAW NAMES - TO CONTACT list" displays a table of contact information:

	Phone No	*Business	Contact Name	*Suburb	Rating	Call by	1st Called	Last Call	Follow Up
1	9984 7774	Genesys Wealth Advisers	David Lunn	DEE WHY	2.WARM	MARY.J	19-May-10	19-May-10	20-May-10
2	3897 3757	Queensland Manufacturing I	Leslie Wessels	NARANGBA		MARY.J	18-May-10		
3	8379 0200	UCI Pty Ltd	Russell King	WEST MELBOURN	2.WARM	MARY.J	18-May-10	18-May-10	20-May-10
4	9906 1388	Mildren Prestige	David Galvin	ARTARMON	1.HOT	MARY.J	18-May-10	20-May-10	21-May-10

## Start your Campaign :

You can have several telemarketing campaigns running at the same time – classified according to a Campaign Code (relating to a series of Questions to be answered), the Origin (normally just "Telemarketing"), and the Industry Group the "raw" names normally come from.

This shows a list of (so called) "raw" names. These are the one that are to be, or have already, been contacted during this campaign.

You can see some of the Results Analysis here too – in terms of the total number of names, and the number of calls made so far. You can also see some of the results of those calls – in terms of the next Follow Up Date, and their "Rating".





# Raw Names to Contact :

The screenshot shows a software interface titled "InterAcct Demo - [RAW NAMES - TO CONTACT - display ]". The interface includes a menu bar (File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help) and a toolbar with various icons. The main content area is a form with the following fields:

Ref No	100010	Survey	SALES	Type	B Business
Phone No	9984 7774	Fax No		Record Id	
Ph Area	02	Origin	T/MARKET	Rating	
*Business Contact Name	Genesys Wealth Advisers			1st Called	
Address 1	Level 2, 17 Pacific Parade			Last Call	
Address 2				Follow Up	
*Suburb	DEE WHY	State	NSW	P/Code	2099
Industry	FIN-ADVISERS			<b>Menu</b> 1. Call Details 2. Print : Call Sheet 3. Names Database 4. Phone Search 5. Company Name Search 6. Change Phone Number	
EEmail	davidl@nac.com.au				
Comments	Member of Northside Financial Services				

Arrows in the image point from the text below to the "1st Called" field and the "Menu" box.

This screen shows a 'raw' name – ready to be contacted.

Once called, then the other fields (shaded in green) will be 'populated'.

This data can be input here (say, gathered from Internet research), or alternatively imported from a data file.

The "**Next Step**" is to make the first call, and gather the additional data about this business (can also be used for Individuals as well).

# Telemarketing Call Report :

Print Phaser 8560DN-16 PS    Automatically Select    Email    PDF    Exit

## TELEMARKETING CALL SHEET

Date : 27/05/2010

<b>Survey</b>	: SALES	<b>Origin</b>	: T/MARKET	<b>Industry</b>	: FIN-ADVISERS	<b>Telemarketer</b>	: MARY.J	<b>Call date</b>	: ____/____/____
Phone	: (02) 9984 7774	Business	: Genesys Wealth Advisers						
Address	: Level 2, 17 Pacific Parade, DEE WHY, NSW 2099								

Contact	:		Position	:	
Fax No	:	Mobile	:	Toll Free	:
Comment	:				
Activity	:	Result	:	Rating	:
Last Action	:			Follow Up	:
Next Action	:			S/Person	:
Notes	:				

<b>Survey</b>	: SALES	<b>Origin</b>	: T/MARKET	<b>Industry</b>	: MANUFACTURING	<b>Telemarketer</b>	: MARY.J	<b>Call date</b>	: ____/____/____
Phone	: (07) 3897 3757	Business	: Queensland Manufacturing Industries Pty Ltd						
Address	: 1 Boron Street, NARANGBA, QLD 4504								

Contact	:		Position	:	
Fax No	:	Mobile	:	Toll Free	:
Comment	:				
Activity	:	Result	:	Rating	:
Last Action	:			Follow Up	:
Next Action	:			S/Person	:
Notes	:				

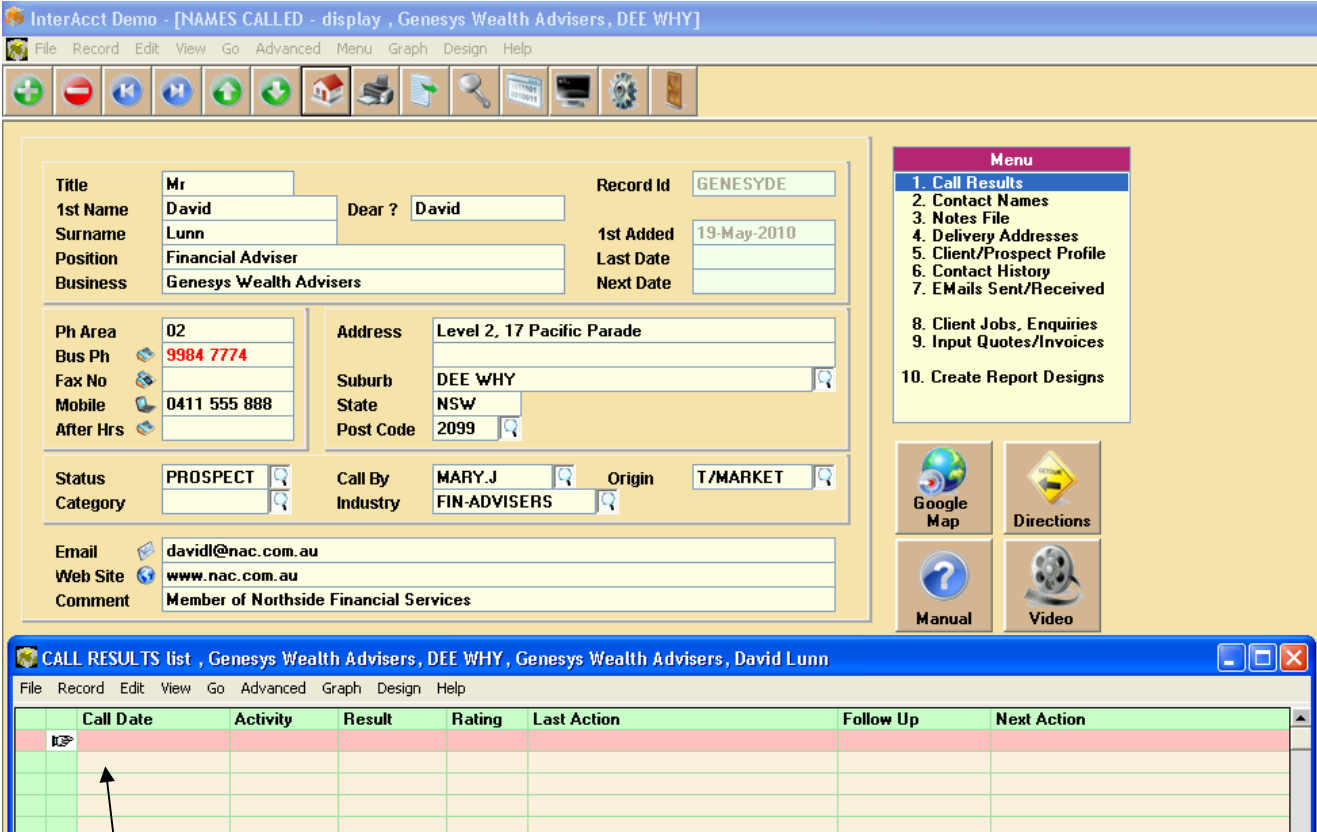
<b>Survey</b>	: SALES	<b>Origin</b>	: T/MARKET	<b>Industry</b>	: COMM.OFFICE	<b>Telemarketer</b>	: MARY.J	<b>Call date</b>	: ____/____/____
Phone	: (02) 8379 0200	Business	: UCI Pty Ltd						
Address	: 700 Spencer Street, WEST MELBOURNE, VIC 3003								

Contact	:		Position	:	
Fax No	:	Mobile	:	Toll Free	:
Comment	:				
Activity	:	Result	:	Rating	:
Last Action	:			Follow Up	:
Next Action	:			S/Person	:
Notes	:				

You call print a "Call Report" as a blank form to record your Telemarketing Call results.

This can be for a complete list of names for a Campaign, or a single sheet for each name.

# First Contact Completed :



This screen shows a Business Name that has just been contacted – in terms of now adding a Contact Name to the information. The main database of Business Contacts has been updated – and a Record Id code created automatically.

The other information from the previous “raw” names screens copies in automatically, so the actual number of data entry fields is minimised.

The “Call Results” screen pops up automatically to allow you to move straight on to record the results of your contact. All you need do is press the ‘Enter’ key to proceed.

# Call Results :

The screenshot displays a software application window titled "InterAcct Demo - [CALL RESULTS - display , Genesys Wealth Advisers , DEE WHY , Genesys Wealth Advisers , David Lunn". The interface includes a menu bar (File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help) and a toolbar with various icons. The main content area is divided into several sections:

- Call Details:** Call Date: Wed 19-May-2010, Call by: MARY.J, Activity: 1.CALL, Survey: SALES, Status: PROSPECT, Rating: 2.WARM, Result: FOLLOW-UP, Industry: FIN-ADVISERS.
- Contact:** David Lunn, Position: Financial Adviser.
- Actions:** Last Action: Not Available At the Moment, Follow Up: Thu 20-May-2010, Next Action: Call Back Tomorrow - Best Time Before 10 AM.

On the right side, there is a vertical menu with buttons for Script, Prospect, Notes, Quotes, Jobs, and Diary. Below the main content area, a window titled "TELEMARKETING SCRIPTS (F9=Save Esc=Exit F6=Print F4=insert date/time)" is open, displaying a script with the following text:

Hello, my name is ..... I am calling from .....

We sent out some information recently to .....

I am just wanting to check that they received it, and if we might be of service to your company.

Can you connect me to ..... please ?

---

Mr ..... ? (yes) Hello, my name is ..... I am calling from .....

We sent you out some information recently concerning ..... Did you receive it ?

I am calling on behalf of ..... from our company.

They would like to courtesy of introducing themselves to you, and seeing if we can be of service to your company.

Will you be in the office later today, say around 11am ?

QUESTION : What is it concerning ?

It is really only only a request that ..... can introduce themself to you.

It should only take just a few minutes of your time. Does around 11 am suit you ?

An arrow points from the "Follow Up" field in the call details section to the script window.

This screen shows a Call Result Activity – together with the related Telemarketing Script.

To speed data entry the “Last Action” and “Next Action” note lines are table lookup fields (for standard responses) in order to dramatically speed up data entry.

## What Next Action ?

The screenshot displays the InterAcct Demo software interface. The top window, titled "InterAcct Demo - [CALL RESULTS - display , Genesys Wealth Advisers, DEE WHY , Genesys Wealth Advisers, David Lunn]", contains a form for call details. The form includes fields for Call Date (Wed 19-May-2010), Call by (MARY.J), Activity (1.CALL), Survey (SALES), Result (FOLLOW-UP), Status (PROSPECT), Rating (2.WARM), and Industry (FIN-ADVISERS). The Contact is David Lunn, a Financial Adviser. The Last Action is "Not Available At the Moment", the Follow Up is "Thu 20-May-2010", and the Next Action is "Call Back Tomorrow - Best Time Before 10 AM". A menu is open, showing options: 1. Get Next Name, 2. Questions - Answers, 3. Products/Services Profile (highlighted), 4. Send Letter, 5. Activity Comments, and 6. Contact Names. To the right of the form are buttons for Script, Prospect, Notes, Quotes, Jobs, Diary, and History.

The bottom window, titled "CUSTOMER PRODUCT PROFILE list , Genesys Wealth Advisers, DEE WHY , Genesys Wealth Advisers, David Lunn", displays a table with the following data:

	Using	Product Description	Our Equivalent Product	Qty PA #	Unit Price \$	Value \$ PA	Application	Current Supplier	Next Date	Ex
1	NEED	Sales & Marketing System	InterAcct	5	1,250.00	6,250.00	Names Databas	Not Applicable	15-Jun-10	

An arrow points from the "Next Step" menu option in the top window to the "InterAcct" product entry in the bottom window.

This shows the completed Call Results screen, together with one of the “Next Step” menus – allowing you to ‘profile’ what Products/Services this Prospect might be currently using, or need. This file is normally personalised to suit your needs.

It is at this point where you might want to –

1. Record answers to the Campaign Survey questions
2. Create a (standard) personalised letter – *“please brochure attached”*
3. Create a Quotation – Products/Services, or a Job
4. Make an entry in the Salesperson’s follow up Diary
5. Make further notes

If there is a follow up date (for the Telemarketer) it will update their Diary. Also updated are the Call Summary Analysis, and the Daily Activity Register – see under Visual Search Enquiries – next page.

# Visual Search Enquiries :

InterAcct Demo - [DAILY ACTIVITIES list]

File Record Edit View Go Advanced Graph Design Help

	Call Date	Call by	Activity	Result	S/person	Rating	Business	Last Action	Follow Up	Next Action
1	20-May-10	MARY.J	2.CALL	QUOTE	MARK.W	1.HOT	Mildren Prestige	Wants A Quote	21-May-10	Prepare Quote
2	19-May-10	MARY.J	1.CALL	FOLLOW-UP		2.WARM	Genesys Wealth Adviser	Not Available At the Moment	20-May-10	Call Back Tomorrow - Best Time Before 10 AM
3	18-May-10	MARY.J	1.CALL	FOLLOW-UP		2.WARM	Mildren Prestige	Called - Wants Info	20-May-10	Brochure Sent
4	18-May-10	MARY.J	1.CALL	FOLLOW-UP		2.WARM	UCI Pty Ltd	Called - Wants Info	20-May-10	Brochure Sent

A register of all Telemarketing Activity – search on any of these fields (columns)

InterAcct Demo - [TELEMARKETING FOLLOW UPS list]

File Record Edit View Go Advanced Graph Design Help

	T/Mtkr	Follow Up	Business Name	Contact Name	Activity	Last Date	Last Action	Next Action
1	MARY.J	Thu 20-May-2010	Genesys Wealth Advis	David Lunn	1.CALL	19-May-10	Not Available At the Moment	Call Back Tomorrow - Best Time Before 10 AM
2	MARY.J	Thu 20-May-2010	Mildren Prestige	David Galvin	1.CALL	18-May-10	Called - Wants Info	Brochure Sent
3	MARY.J	Thu 20-May-2010	UCI Pty Ltd	Russell King	1.CALL	18-May-10	Called - Wants Info	Brochure Sent

A summary of calls made by date and Telemarketer. Again, search on any fields.

InterAcct Demo - [CALL RESULTS SUMMARY list]

File Record Edit View Go Advanced Graph Design Help

	Call Date	T/Mtkr	Activity	Result	Industry	Count #
1	20-May-10	MARY.J	2.CALL	QUOTE	SERVICE-VEH	1
2	19-May-10	MARY.J	1.CALL	FOLLOW-UP	FIN-ADVISERS	1
3	18-May-10	MARY.J	1.CALL	FOLLOW-UP	COMM.OFFICE	1
4	18-May-10	MARY.J	1.CALL	FOLLOW-UP	SERVICE-VEH	1
						4

Follow Up Diary for a Telemarketer.