

360 Dotnet

TCF

Questionnaire
Training Manual



Introduction

The object of this manual is to provide you with the necessary navigational support in order to give you the ability to send out an electronic TCF (Treating Customer Fairly) Questionnaire to your existing clients.

TCF Questionnaire is a simple yet effective Intrinsic approved E-Questionnaire facility which can be sent from your Activity Management System case record on completion of a sale event. This will send an email to your client with a link to complete the TCF questions. The client simply selects from the drop down box and gives an overall service rating and ticks if they want to discuss future business. If the client selects one or more of the product areas for future business this creates an automatic lead into the adviser hotbox to contact or refer to a specialist adviser.

The guide focuses particularly on the key navigational points for the TCF process (how to send, how to retrieve and how to action/respond to any feedback received).



Getting Started

For the purposes of this manual we will send an electronic TCF Questionnaire from opening a case record from the Office application. Please note however the same functionality is available when viewing/opening a case record from the Advisor application. The following process assumes you have an internet connection and are working in connected mode.



Enter your **Username** and **Password** and click **Logon**.

360 Lifecycle - Office

360 Lifecycle
Office
5.1.0.1

User name
Password

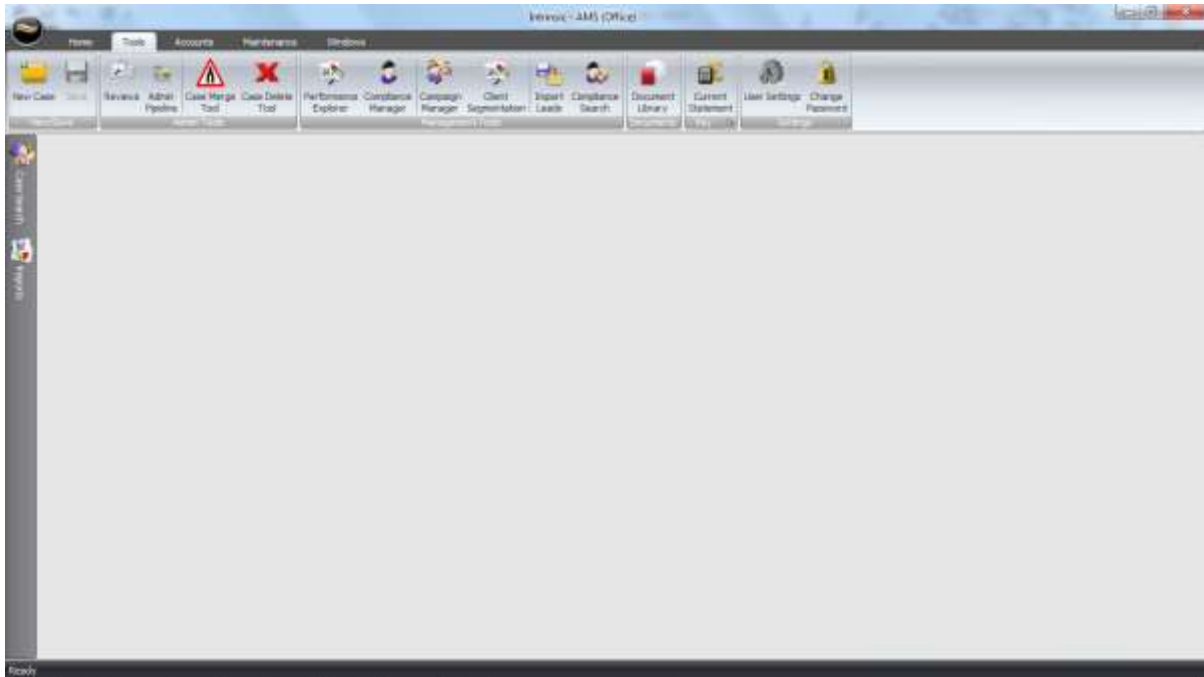
Login Cancel

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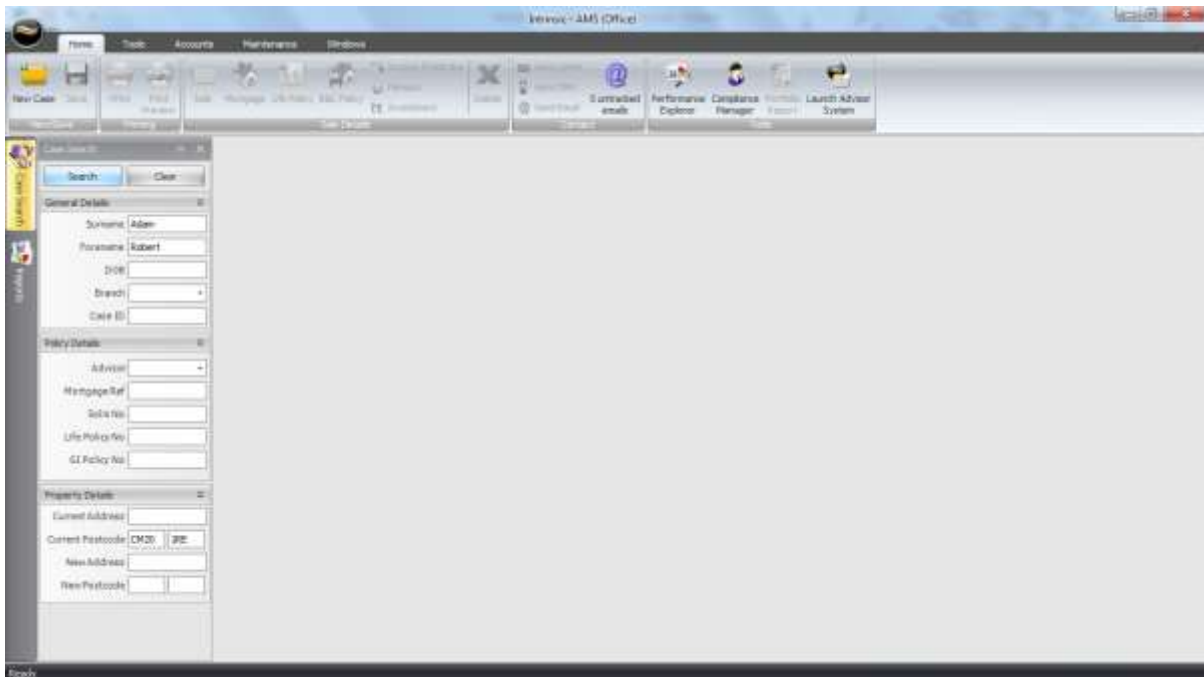
Landing Screen (Office)

Once this loads, you have now arrived at the Office Landing Screen.



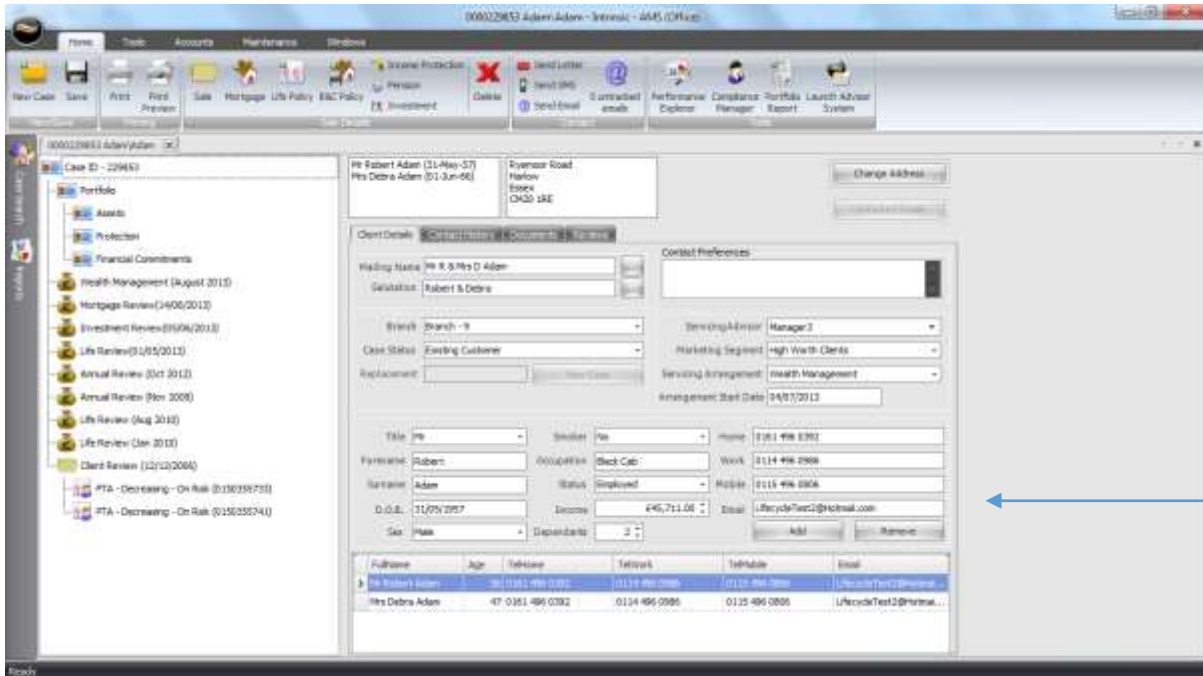
Client Search

From here, you need to select the customer whom you wish to send the questionnaire to post the sale event. You can locate them by using the **Client Search** button. Simply type in the policy details or personal details of your customer. Once done, simply select **Search**.

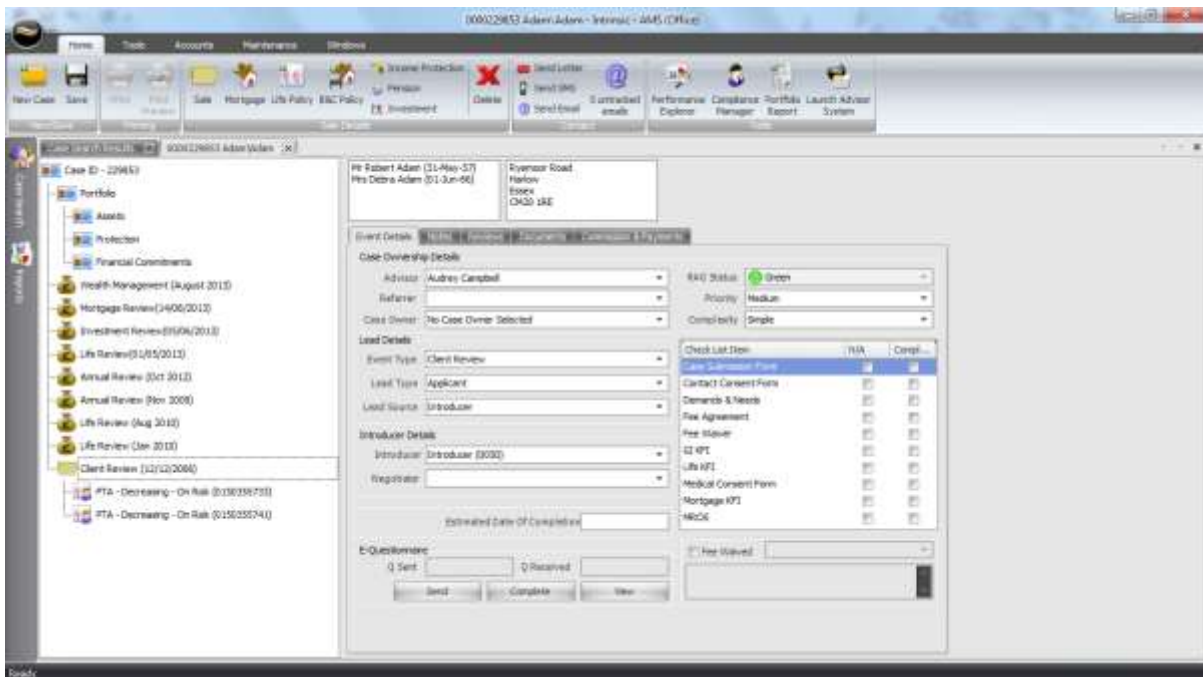


Client Record

You will see the client's case record appear. If you select **Case ID** you can view their general details. At this stage, you must ensure that you have a valid email address for your customer.

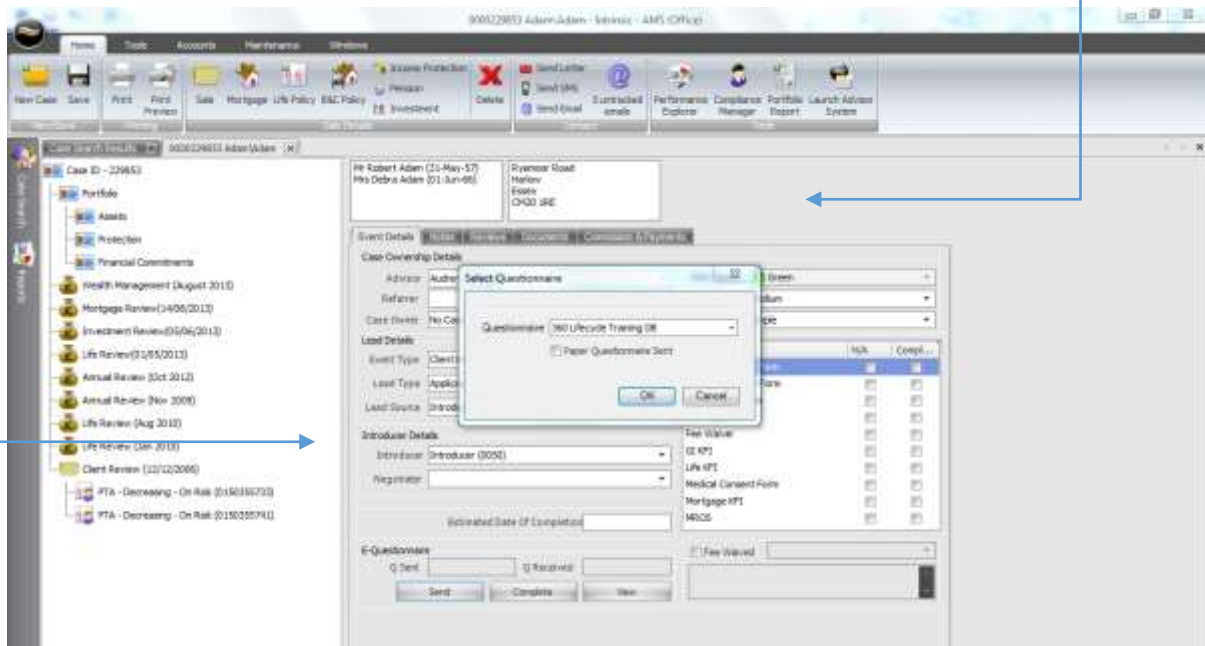


From here, scroll down the data tree until and select the **Vanilla** 'Client Review' folder which represents a sale event.

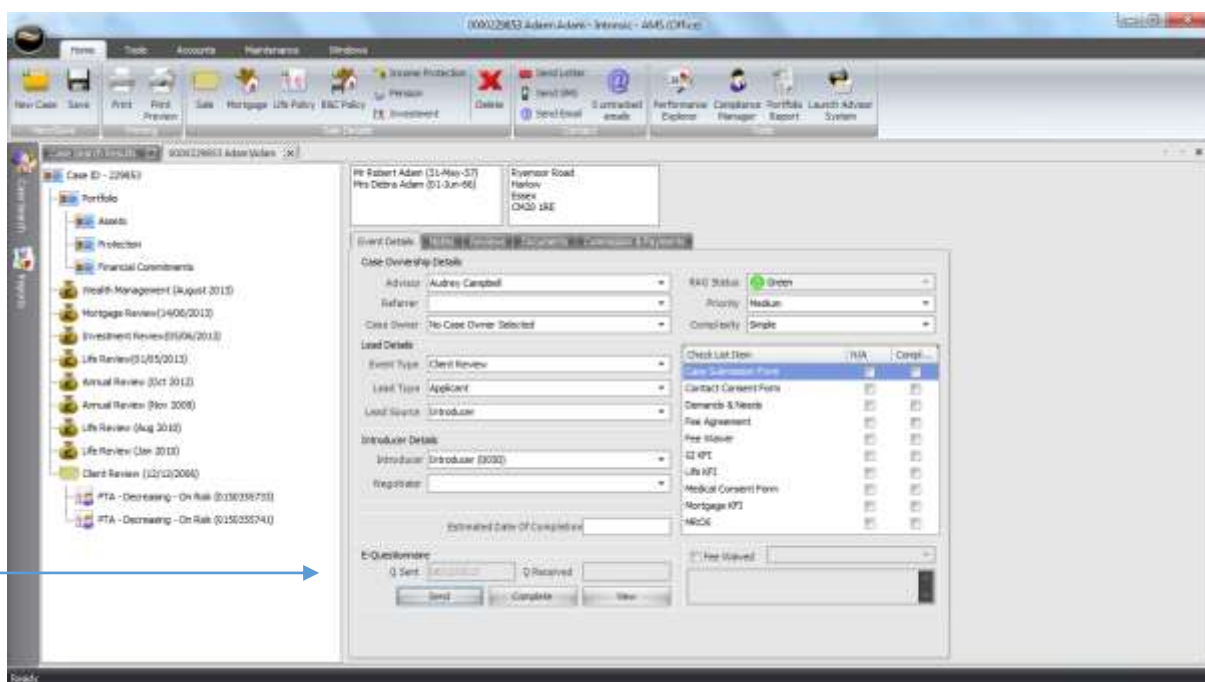


TCF Access

You will now notice under The Event Details tab the option to send the E Questionnaire, simply select **Send** and a pop up box will appear. Simply select the questionnaire from the drop down menu and then choose **OK**. *Please note, if there is no client email address captured for an electronic TCF questionnaire to be sent to, then **Paper Questionnaire Sent** will be selected. You can then manually **Complete** the results once the paper questionnaire has been received.*



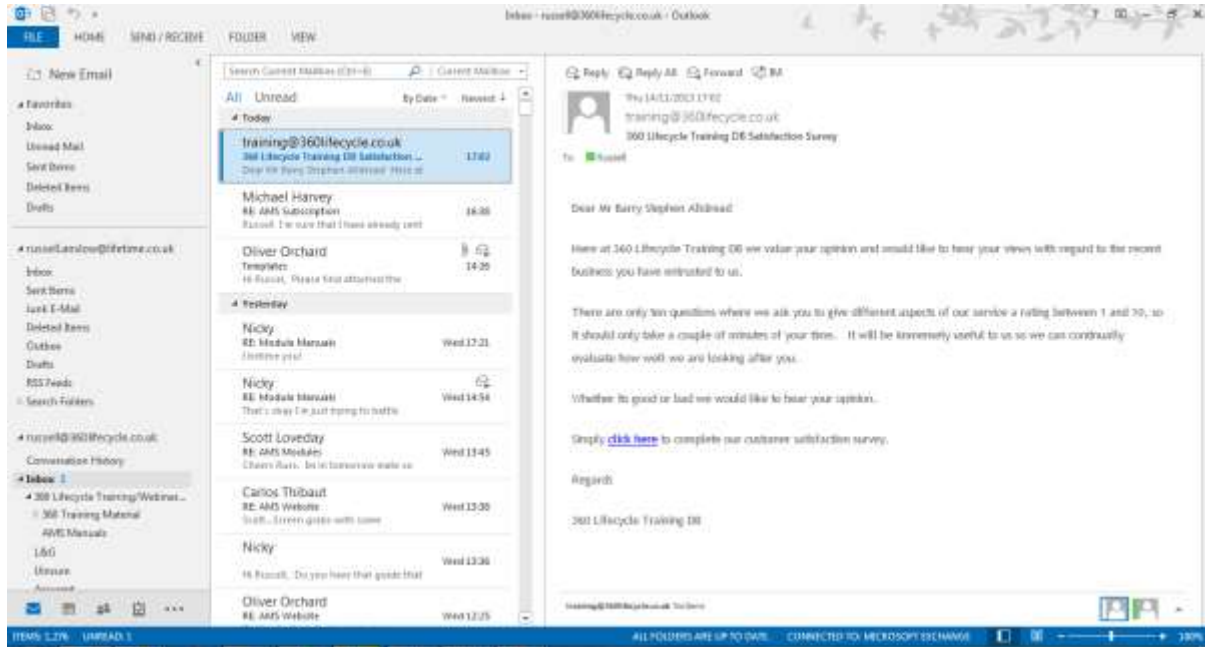
Once you have selected **Send** you will notice that the **Q Sent** box will have greyed out and a Q Sent date now shows.



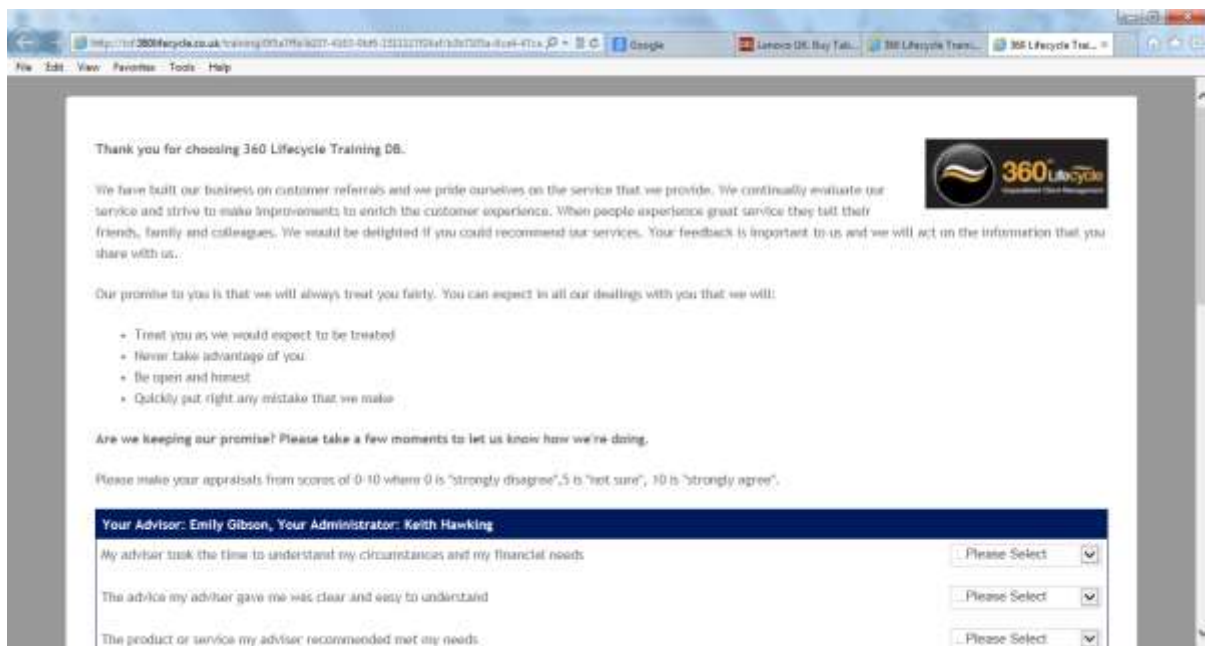


The Electronic TCF Completion Process

Assuming an electronic questionnaire was used, from this point the TCF will have been sent to your client via email. Below is how it will appear in their inbox. Within the email will be a hyper link which will take your customer directly to the E Questionnaire.



Once your client has clicked onto the link, it will then take them directly to the TCF Questionnaire.





By simply scrolling down the page, the client can view the questions and answer accordingly.

Your Advisor: Emily Gibson, Your Administrator: Keith Hawking

My adviser took the time to understand my circumstances and my financial needs

The advice my adviser gave me was clear and easy to understand

The product or service my adviser recommended met my needs

The written information I received from my adviser was clear and easy to follow

My adviser explained the cost of the advice to me

My adviser was easy to contact, and available to help me with queries when required

My adviser treated me in a friendly, courteous, and helpful manner

My adviser contacts me on a regular basis to review my needs

We kept our promise (see above) in all dealings with you

Service Standards post-sale (during the processing of my case) were excellent

Would you recommend 360 Lifecycle Training DB?

On a scale of 0-10, how likely is it that you would recommend 360 Lifecycle Training DB to a friend, family member, or colleague?

Any other comments regarding your experiences with 360 Lifecycle Training DB?

Your client also has the opportunity to add comments by free text and select whether they require **Additional Advice** in the future.

Would you recommend 360 Lifecycle Training DB?

On a scale of 0-10, how likely is it that you would recommend 360 Lifecycle Training DB to a friend, family member, or colleague?

Any other comments regarding your experiences with 360 Lifecycle Training DB?

Additional Advice

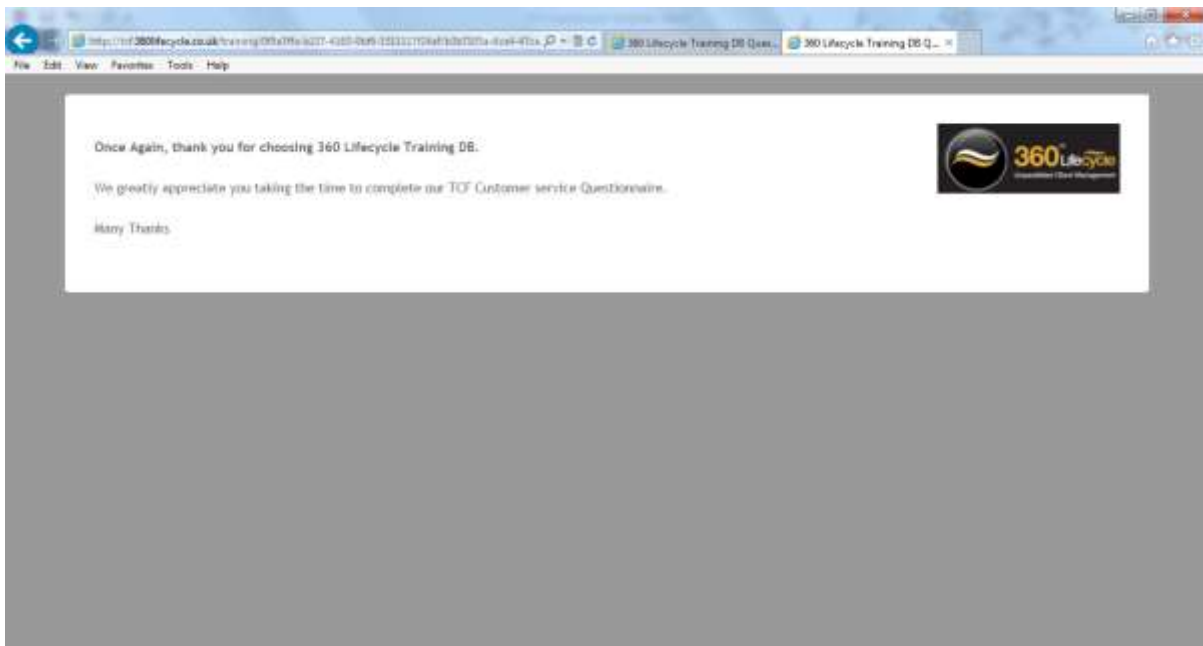
<input type="checkbox"/> Moving House	<input type="checkbox"/> Re Mortgage	<input type="checkbox"/> Buy To Let
<input type="checkbox"/> Mortgage Protection	<input type="checkbox"/> Family Protection	<input type="checkbox"/> Income Protection
<input type="checkbox"/> Buildings And Contents	<input type="checkbox"/> Petrols	<input type="checkbox"/> Inheritance Tax Planning
<input type="checkbox"/> Savings And Investments	<input type="checkbox"/> Long Term Care	<input type="checkbox"/> Private Medical Insurance
<input type="checkbox"/> Wills		

Thanks

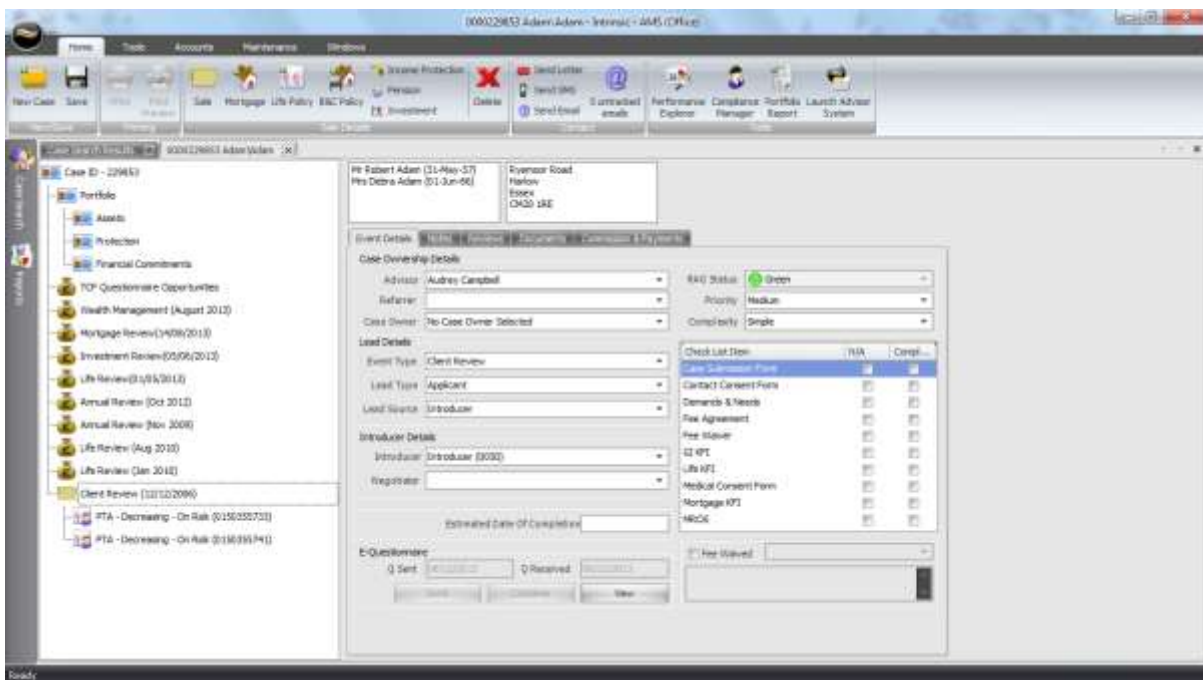
Thank you for taking the time to complete this questionnaire.
Once you are happy that it's complete, please press the submit button.

Once the questionnaire has been completed, all the client needs to do is select **Submit Questionnaire**.

This is the screen that will appear once the TCF has been submitted.



In order to view the TCF Questionnaire, simply return to the system and select **View** in the client's case record.



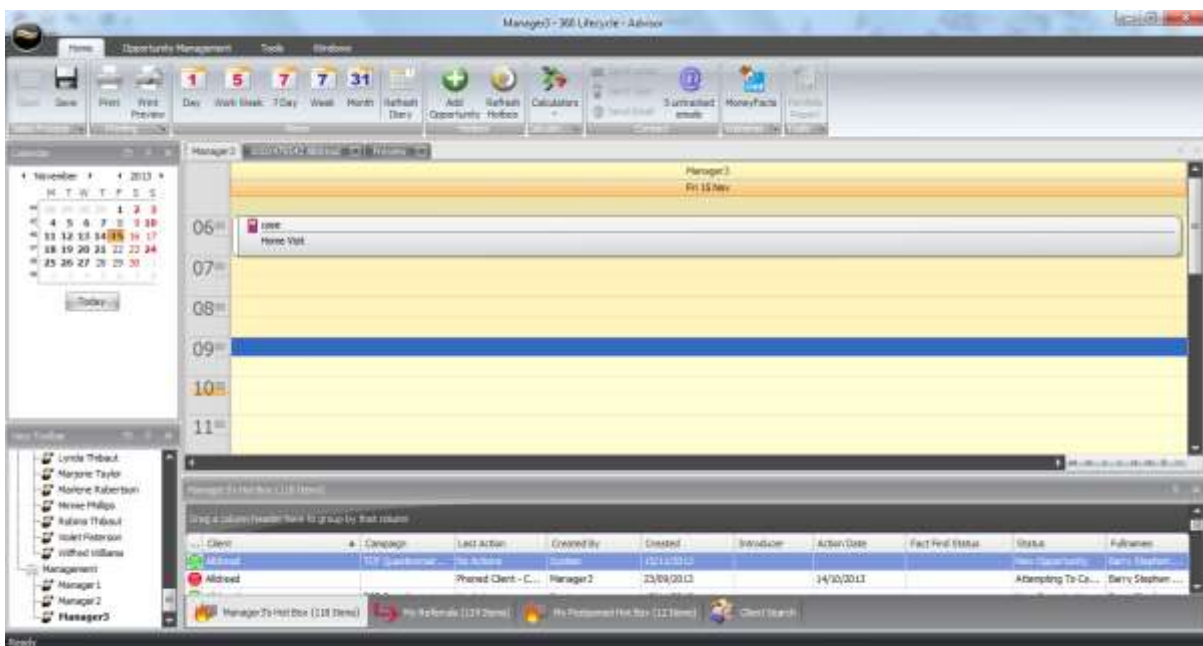


Once loaded, you can view the results.

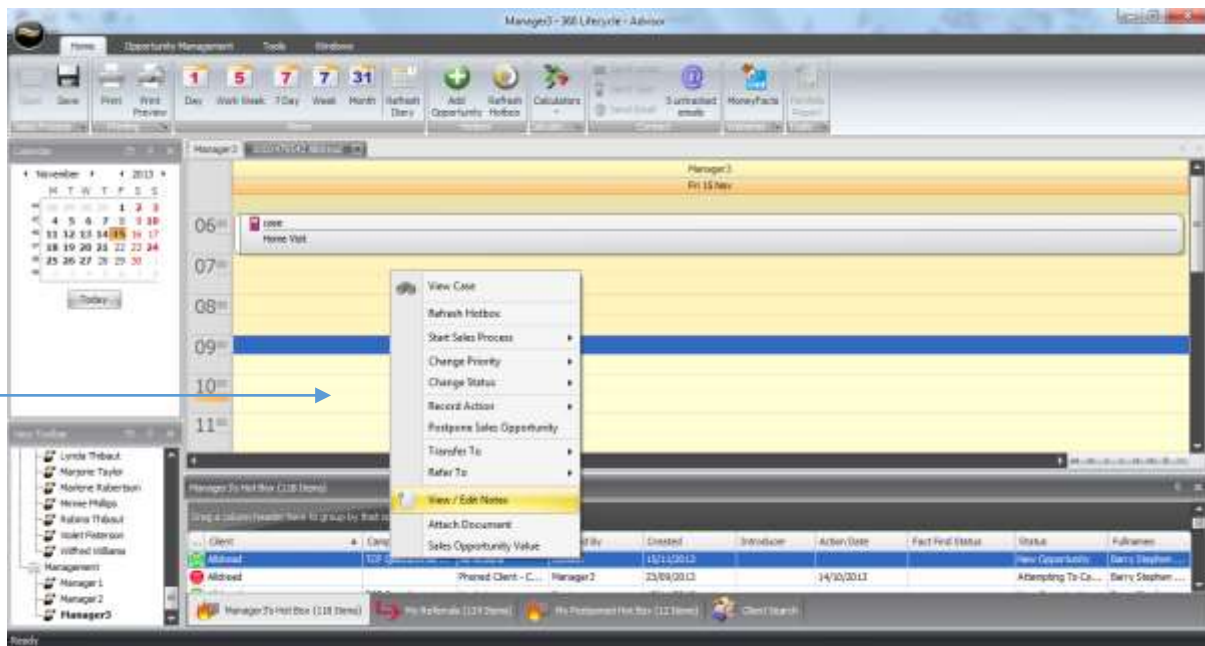


Hot Box

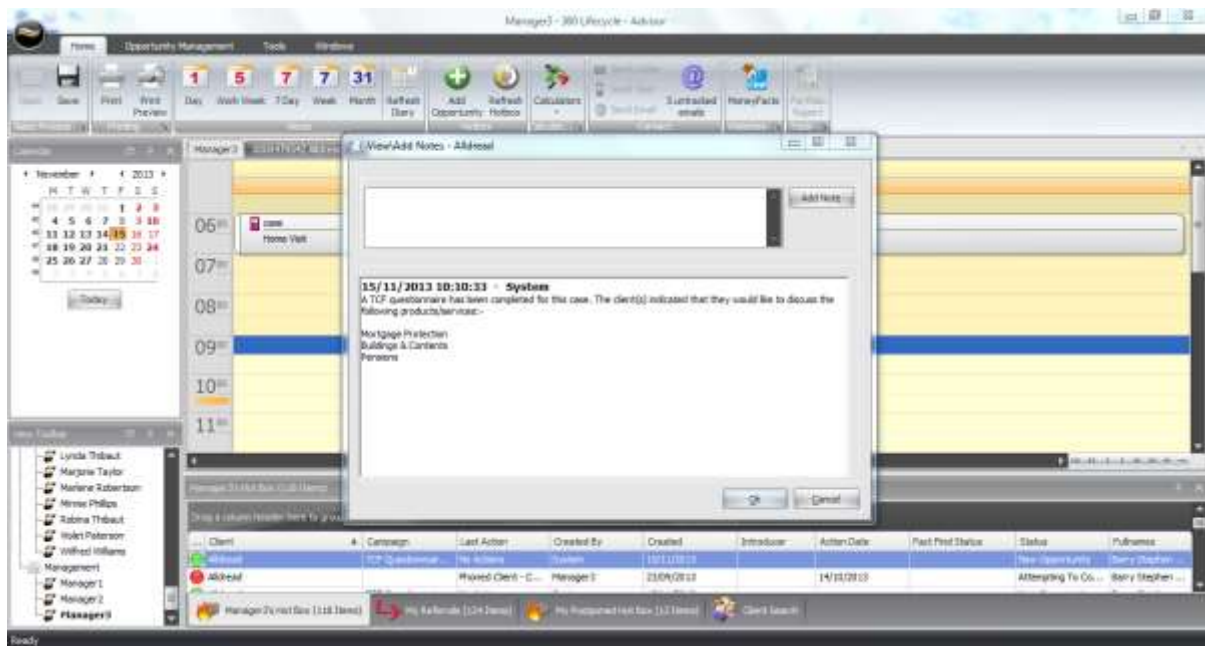
Note that any Additional Advice options that have been ticked will automatically create a sales opportunity for the Servicing Advisor on the case. In order to demonstrate this, simply log into Advisor via the icon on your desktop screen. You will now arrive at the landing screen.



In order to confirm the details of the opportunity which has been created from the electronic TCF, simply right click the opportunity and select **View/Edit** notes from the drop down menu.



Once selected you can clearly see what additional items the client would like to discuss.





TCF Reports

Please note that within the Reports section of Office the below TCF Reports will allow you to monitor TCF Questionnaires Outstanding, TCF Questionnaires Received and TCF Questionnaires Sent.

The 'Questionnaires Outstanding', 'Questionnaires Received' and 'Questionnaires Sent' reports can be found within the 'Client Contact Reports' within the Office Reports as per the screen shot below.

