

360 Lifecycle

TCF Questionnaire Training Manual

Contents

1.0 Introduction	3
2.0 Getting Started.....	3
2.1 Landing Screen (Office).....	4
2.2 Client Search.....	4
2.3 Client Record.....	5
2.4 TCF Access.....	6
2.5 The Electronic TCF Completion Process	7
2.6 Hotbox.....	10
2.7 TCF Reports.....	11

1.0 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).

2.0 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.

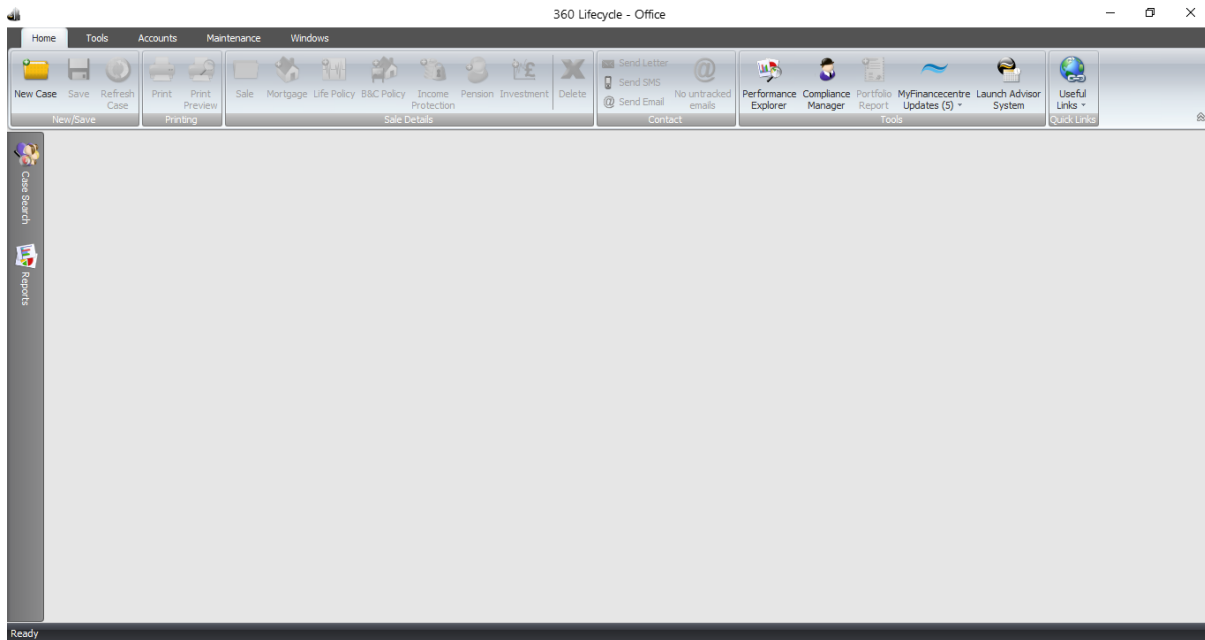


 A screenshot of the '360 Lifecycle - Office' login window. The window title is '360 Lifecycle - Office'. On the left, there is a logo for '360 Lifecycle Office 5.1.0.1' and a copyright notice 'Copyright © Lifetime Financial Management Ltd 2007'. The main area contains two input fields: 'User name' and 'Password'. Below these fields are two buttons: 'Login' and 'Cancel'.

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

2.1 Landing Screen (Office)

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



2.2 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.

2.3 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.

Case ID - 3057011

Mr David Wressell (01-Jan-01) | East Link Meridian Business Park, Leicester LE19 1XU

Buttons: Change Address, Export Case, Untracked Emails

Tabs: Client Details, Case Details, Contact History, Documents, Reviews, ATR Questionnaires, Conveyancing, Client Circum

Client Details

Client Type: Retail Client

Title: Mr

Forename: David

Middle Names:

Surname: Wressell

D.O.B.:

Sex: Male

Contact Details

Home: | Work: | Mobile: 07737310835 | Email: david360lc@outlook.com

Client has no Email Address

Additional Information

Occupation: | NI Number: | Status: | Income: £0.00 | Smoker: Unknown | Dependants: 0

Remove Duplicates: 71 Potential duplicate records found for David

Buttons: Add Client, Remove Client

FullName	Age	Home Phone	Work Phone	Mobile Phone	Email
Mr David Wressell	0			07737310835	david360lc@outlook.com

Data Privacy Settings: View/Edit Permissions, Privacy Portal Request

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

Case ID - 3057011

Mr David Wressell (01-Jan-01) | East Link Meridian Business Park, Leicester LE19 1XU

Tabs: Event Details, Notes, Tasks, Documents, Commission & Payments

Case Ownership Details

User	Role	Edit
David Wressell	Primary advisor	<input checked="" type="checkbox"/>
Tara Bird	Primary administrator	<input checked="" type="checkbox"/>

RAG Status: Green

Priority:

Complexity: Simple

Lead Details

Event Type: Advised Sale

Lead Type:

Lead Source: Website

Introducer Details

Introducer:

Negotiator:

Estimated Date Of Completion:

Check List Item

Check List Item	N/A	Compl...
Case Submission Form	<input type="checkbox"/>	<input type="checkbox"/>
Contact Consent Form	<input type="checkbox"/>	<input type="checkbox"/>
Demands & Needs	<input type="checkbox"/>	<input type="checkbox"/>
Fee Agreement	<input type="checkbox"/>	<input type="checkbox"/>
Life KFI	<input type="checkbox"/>	<input type="checkbox"/>
Medical Consent Form	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage KFI	<input type="checkbox"/>	<input type="checkbox"/>

Fee Waived

E-Questionnaire

Q Sent: | Q Received: | Send | Complete | View

2.4 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.

The screenshot shows the 'Event Details' tab for Case ID 3057011. A 'Select Questionnaire' dialog box is displayed over the 'E-Questionnaire' section. The dialog has a dropdown menu for 'Questionnaire' with 'Account Manager Demo' selected. Below the dropdown is a checkbox for 'Paper Questionnaire Sent'. The dialog has 'OK' and 'Cancel' buttons.


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 screenshot shows the 'Event Details' tab for Case ID 3057011. The 'E-Questionnaire' section now shows 'Q Sent' with the date '27/12/2018' entered. The 'Send' button is greyed out, and 'Complete' and 'View' buttons are visible. The 'Q Received' field is empty.

2.5 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.

Account Manager Demo Satisfaction Survey

 **accountmanagerdemo@360lifecycle.co.uk** ↩ ↶ → …

Thu 27/12/2018, 12:41
You ▾

Dear Mr David Wressell

Here at Account Manager Demo we value your opinion and would like to hear your views with regard to the recent business you have entrusted to us.

There are only ten questions where we ask you to give different aspects of our service a rating between 1 and 10, so it should only take a couple of minutes of your time. It will be immensely useful to us so we can continually evaluate how well we are looking after you.

Whether its good or bad we would like to hear your opinion.

Simply [click here](#) to complete our customer satisfaction survey.

Regards

Account Manager Demo

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

Thank you for choosing Account Manager Demo.

360Dotnet

We have built our business on customer referrals and we pride ourselves on the service that we provide. We continually evaluate our service and strive to make improvements to enrich the customer experience. When people experience great service they tell their friends, family and colleagues. We would be delighted if you could recommend our services. Your feedback is important to us and we will act on the information that you share with us.

Our promise to you is that we will always treat you fairly. You can expect in all our dealings with you that we will:

- Treat you as we would expect to be treated
- Never take advantage of you
- Be open and honest
- Quickly put right any mistake that we make

Are we keeping our promise? Please take a few moments to let us know how we're doing.

Please make your appraisals from scores of 0-10 where 0 is "strongly disagree", 5 is "not sure", 10 is "strongly agree".

Your Advisor: David Wressell, Your Administrator: Tara Bird

My adviser took the time to understand my circumstances and my financial needs	...Please Select ▼
The advice my adviser gave me was clear and easy to understand	...Please Select ▼
The product or service my adviser recommended met my needs	...Please Select ▼
The written information I received from my adviser was clear and easy to follow	...Please Select ▼

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

Your Advisor: David Wressell, Your Administrator: Tara Bird

My adviser took the time to understand my circumstances and my financial needs	...Please Select ▼
The advice my adviser gave me was clear and easy to understand	...Please Select 1 - Strongly Disagree 2 3 4 5 - Not Sure 6 7 8 9 10 - Strongly Agree ...Please Select ▼
The product or service my adviser recommended met my needs	...Please Select ▼
The written information I received from my adviser was clear and easy to follow	...Please Select ▼
My adviser explained the cost of the advice to me	...Please Select ▼
My adviser was easy to contact, and available to help me with queries when required	...Please Select ▼
My adviser treated me in a friendly, courteous, and helpful manner	...Please Select ▼
My adviser contacts me on a regular basis to review my needs	...Please Select ▼
We kept our promise (see above) in all dealings with you	...Please Select ▼
Service Standards post-sale (during the processing of my case) were excellent	...Please Select ▼

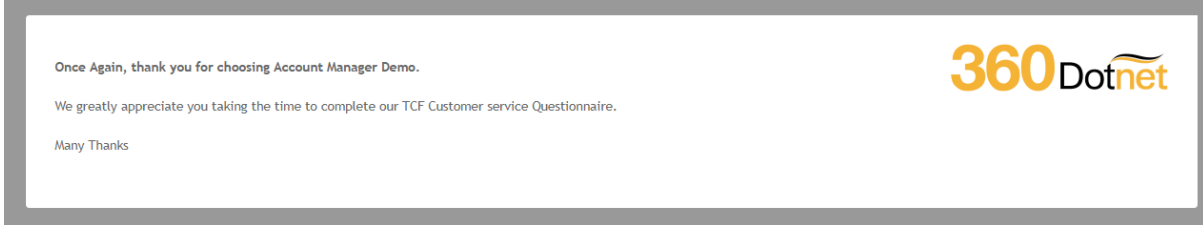
Your client also can add comments by free text and select whether they require **Additional Advice** in the future.

Additional Advice

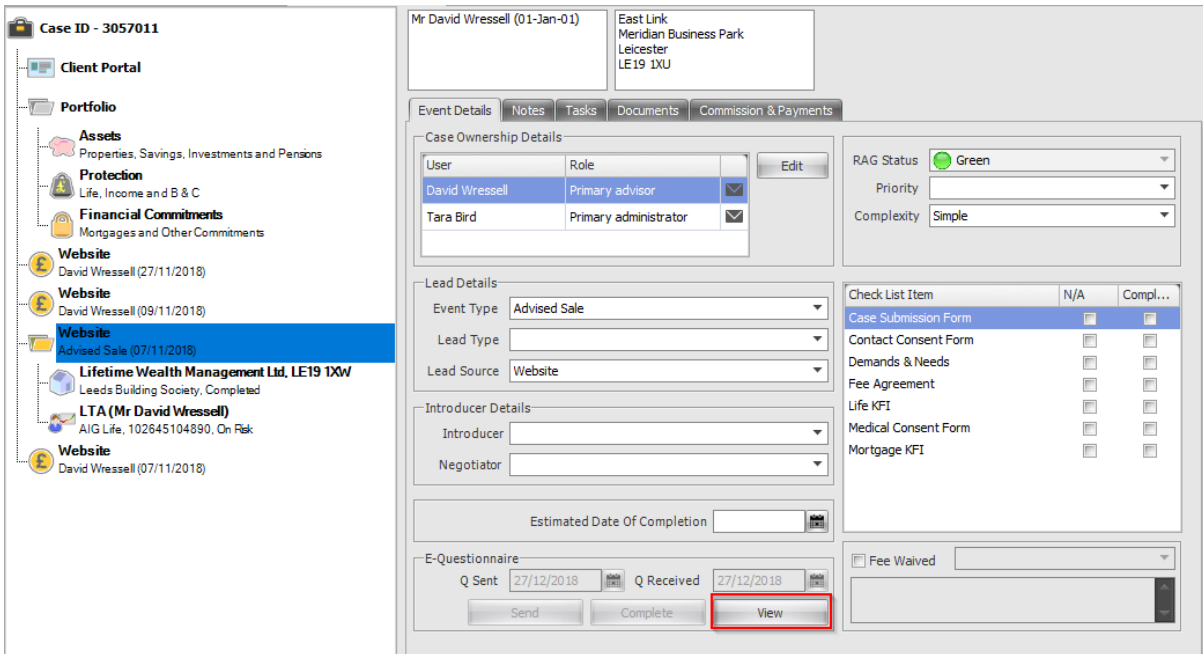
Moving House <input type="checkbox"/>	Re Mortgage <input type="checkbox"/>	Buy To Let <input type="checkbox"/>
Mortgage Protection <input type="checkbox"/>	Family Protection <input type="checkbox"/>	Income Protection <input type="checkbox"/>
Buildings And Contents <input type="checkbox"/>	Pensions <input 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 <input type="checkbox"/>		

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.

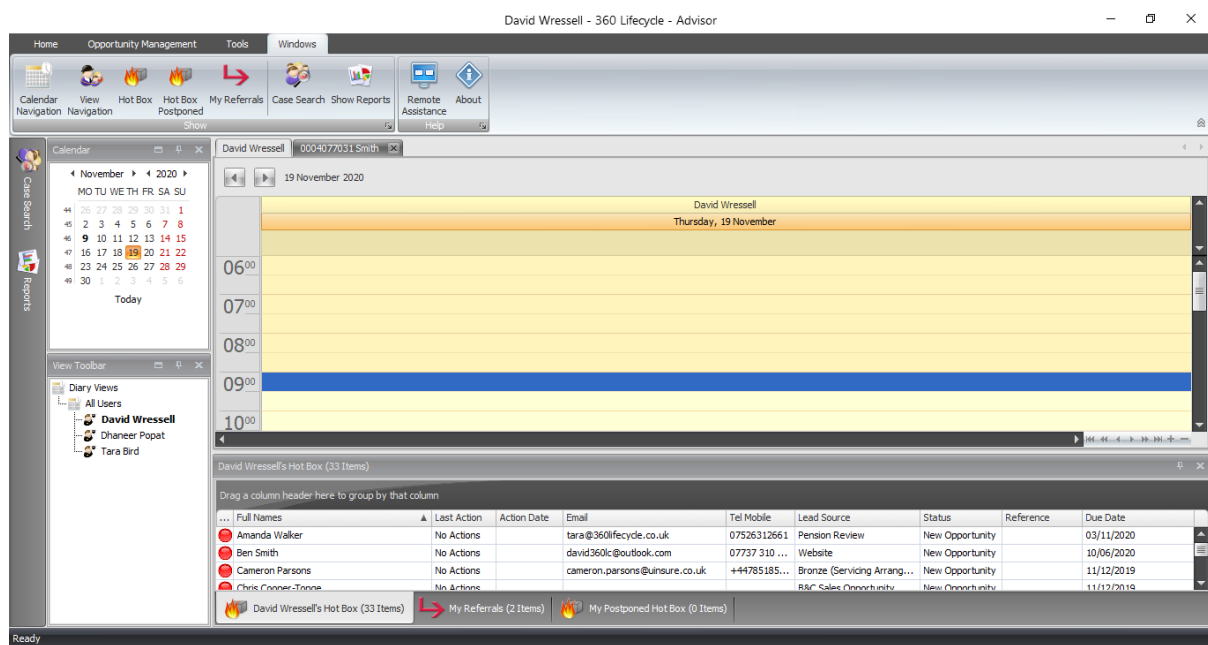


Once loaded, you can view the results.

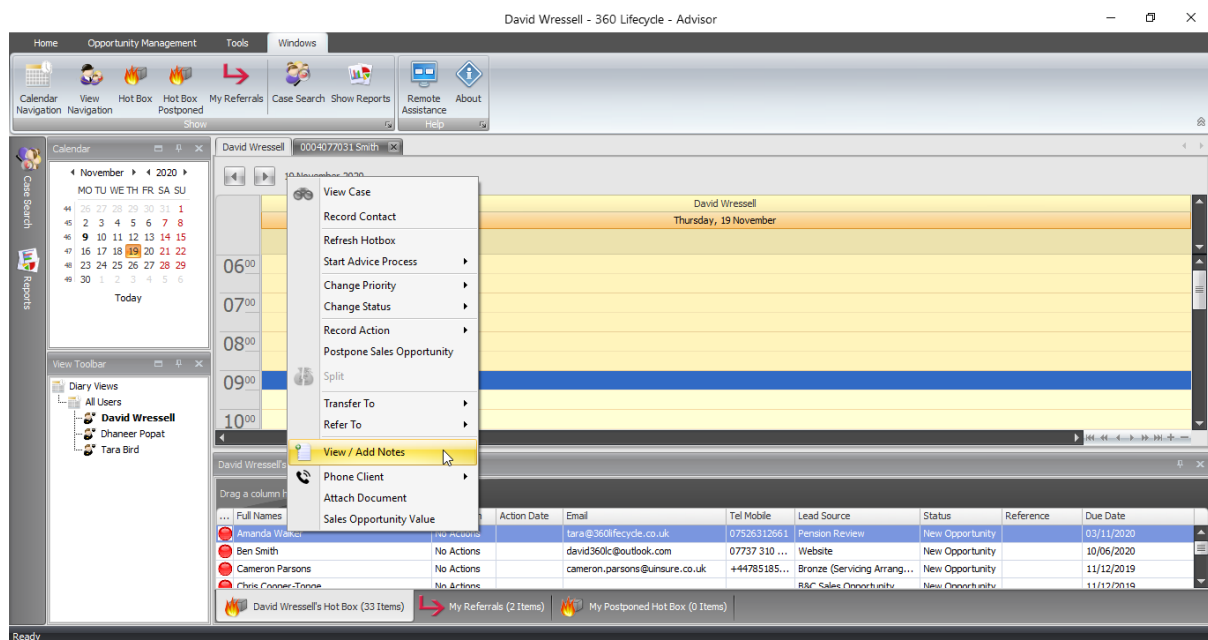


2.6 Hotbox

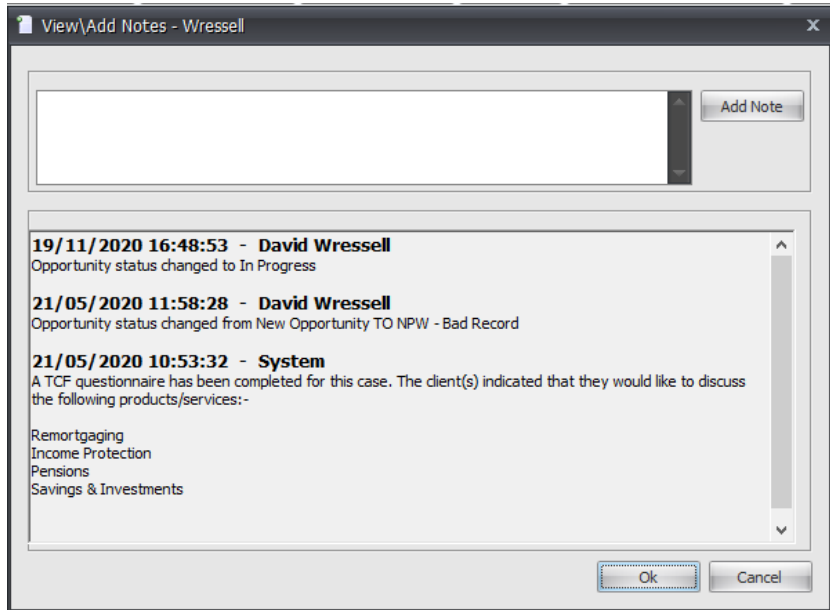
Note that any Additional Advice options that have been ticked will automatically create a sales opportunity for the Servicing Advisor on the case. In order to demonstrate this, simply log into Advisor via the icon on your desktop screen. You will now arrive at the landing screen.



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.



2.7 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.

