TCF Questionnaire Training Manual

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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).

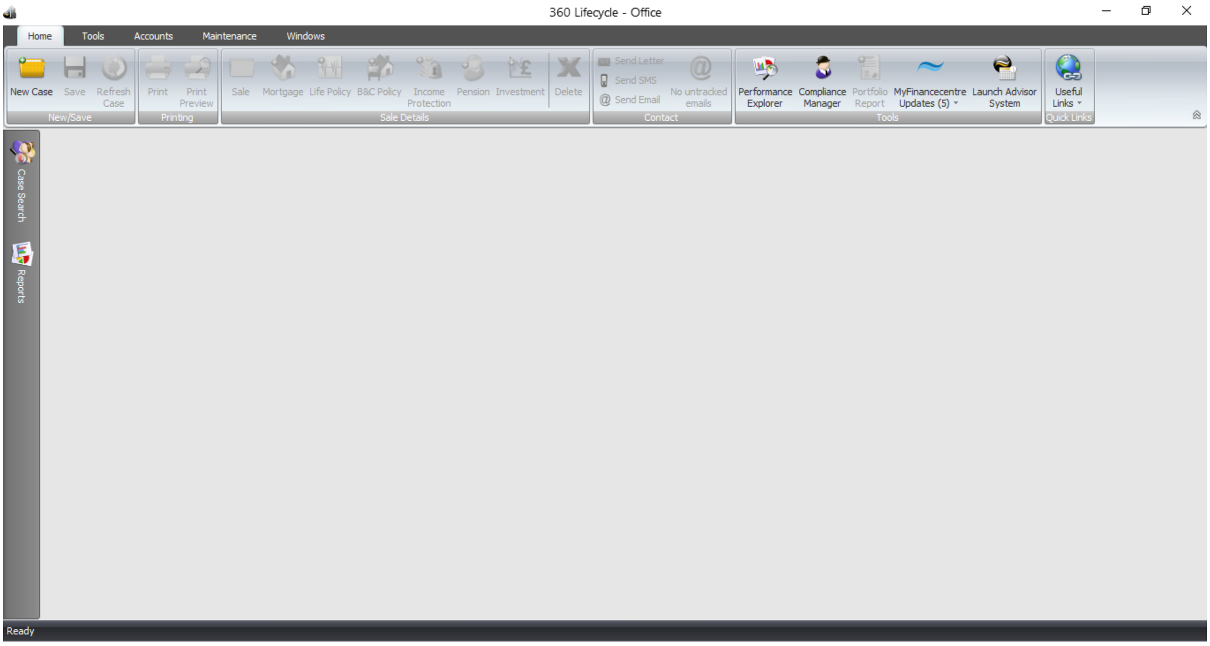
2.0 GETTING STARTED

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.

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

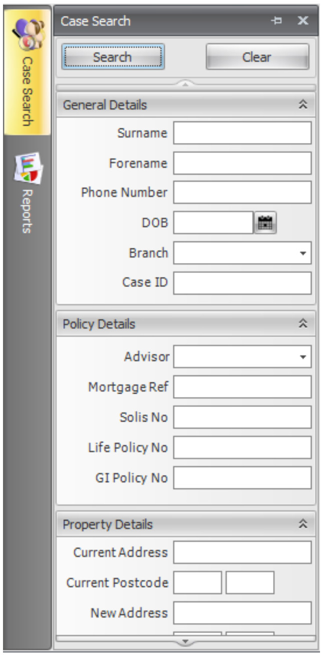
2.1 Landing Screen (Office)

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



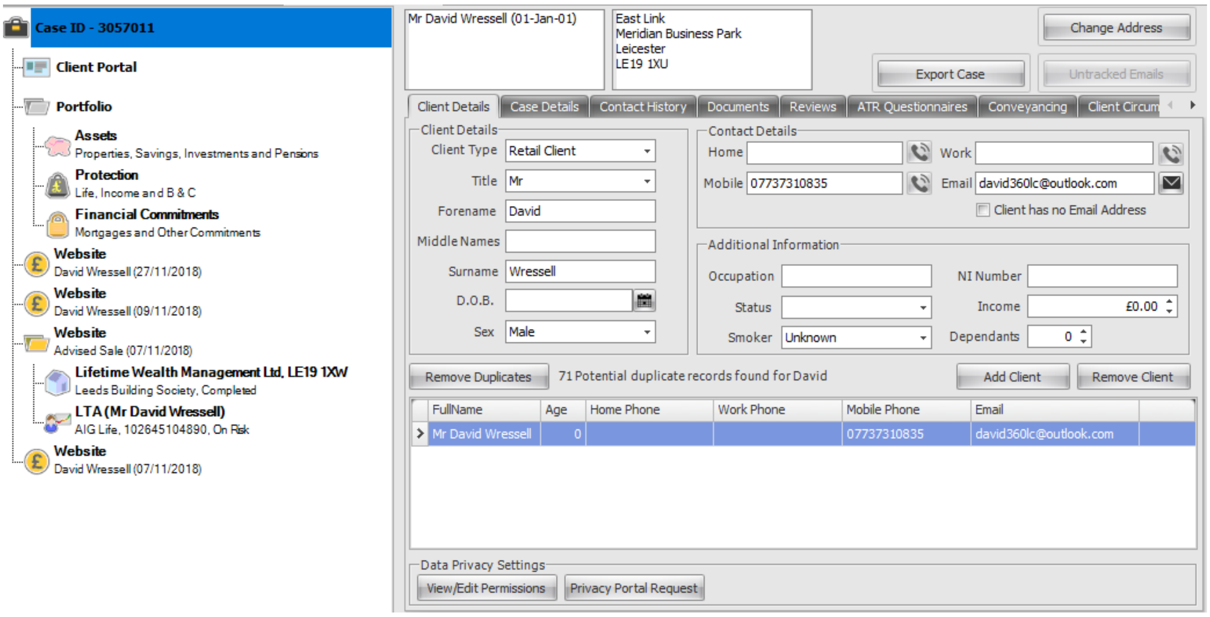
2.2 Client Search

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.

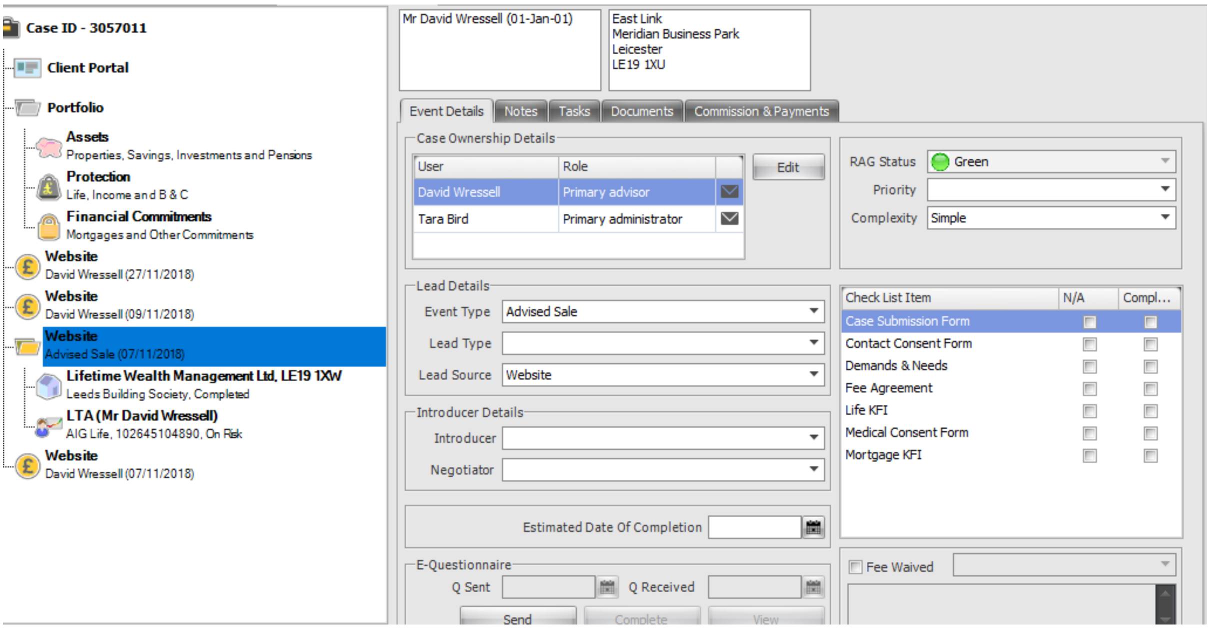


2.3 Client Record

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.

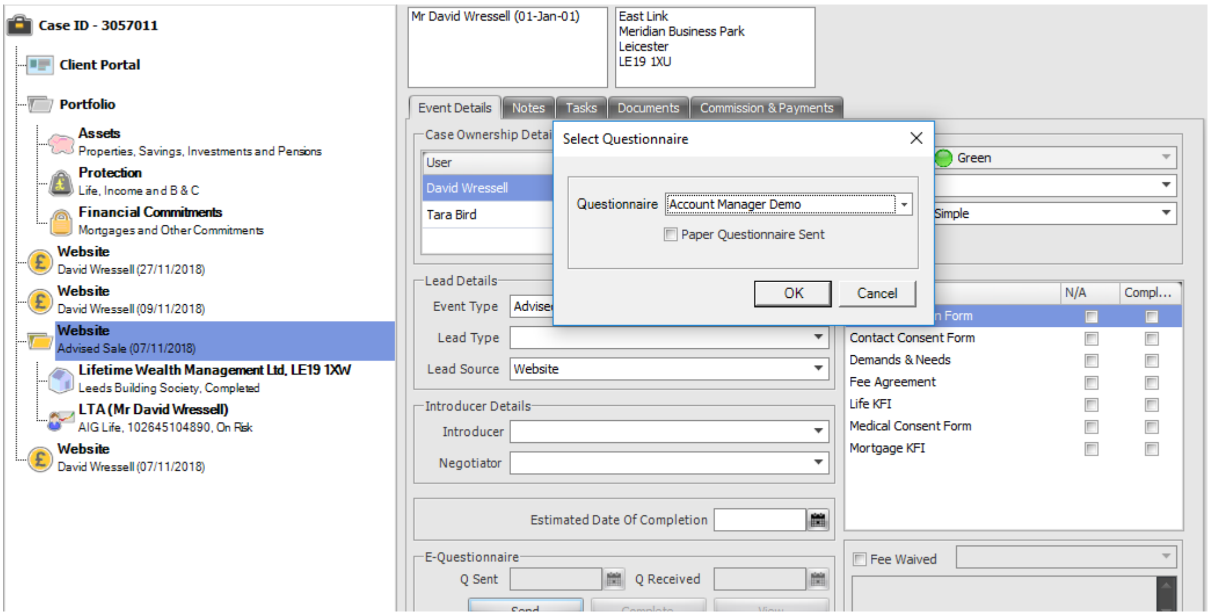


From here, scroll down the data tree until and select the **Vanilla** 'Client Review' folder which represents a sale event.

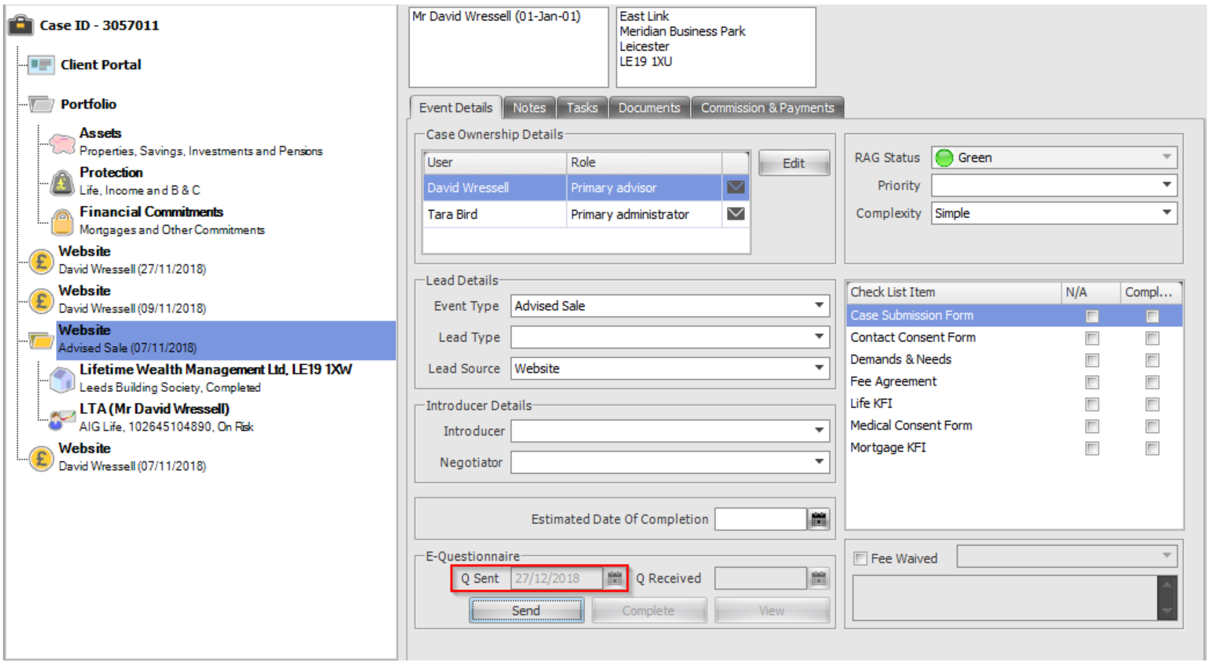


2.4 TCF Access

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.*



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



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

A

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.

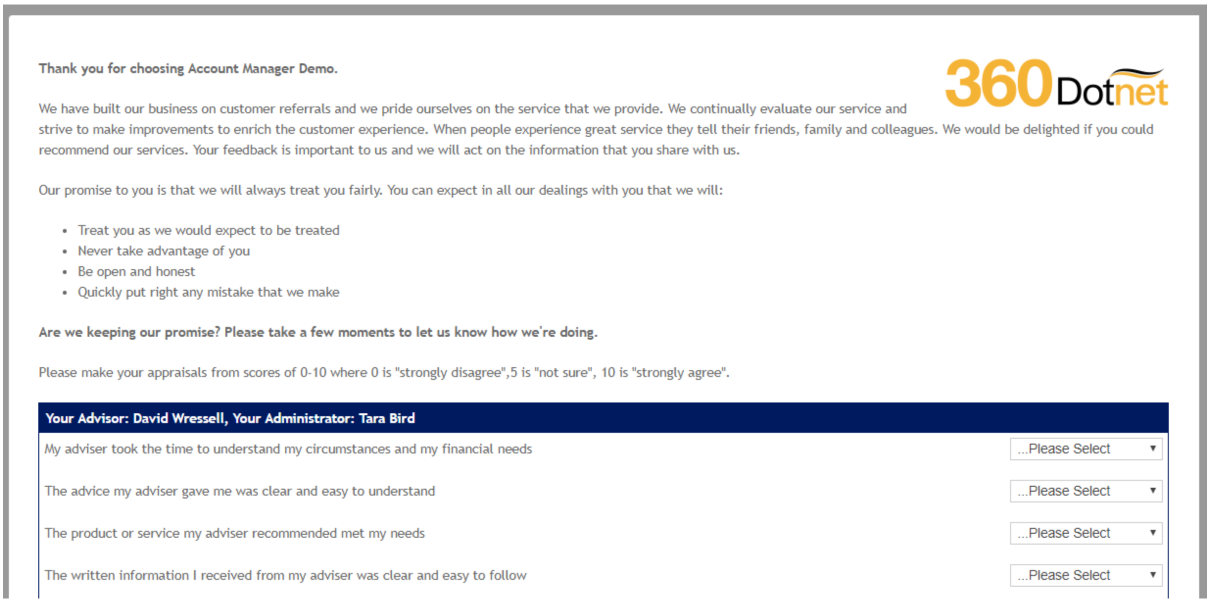
Whether its good or bad we would like to hear your opinion.

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.

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:

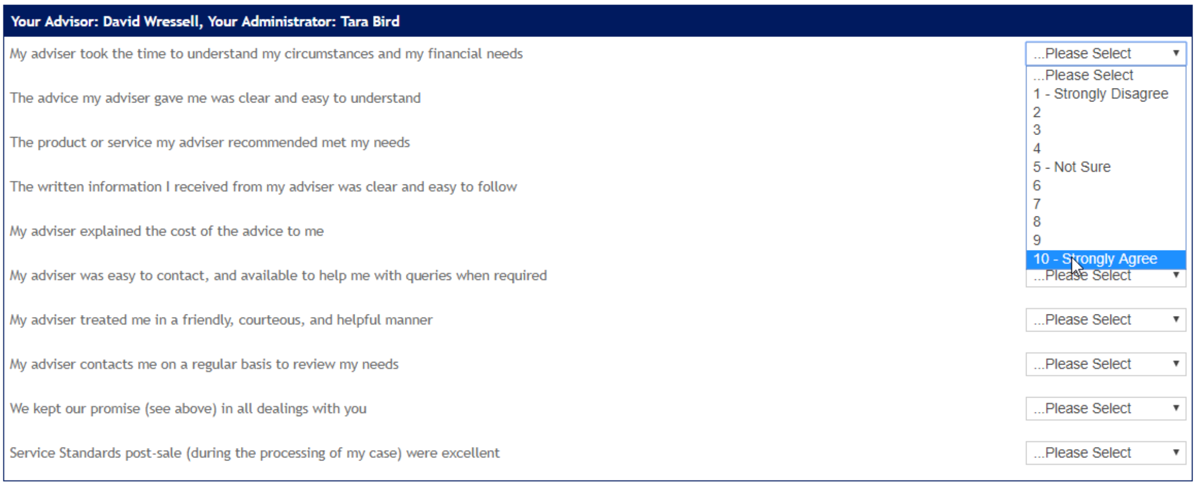
- Treat you as we would expect to be treated
- Never take advantage of you
- Be open and honest
- Quickly put right any mistake that we make

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

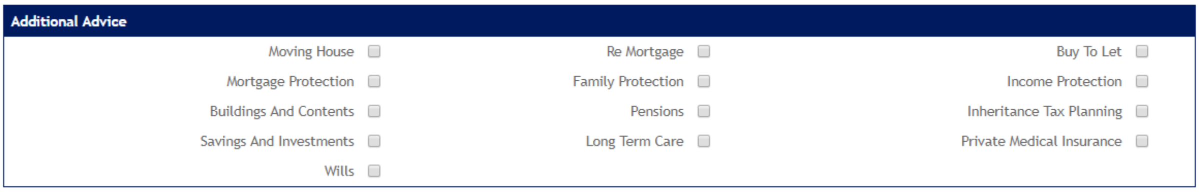
Please make your appraisals from scores of 0-10 where 0 is "strongly disagree",5 is "not sure", 10 is "strongly agree".

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.

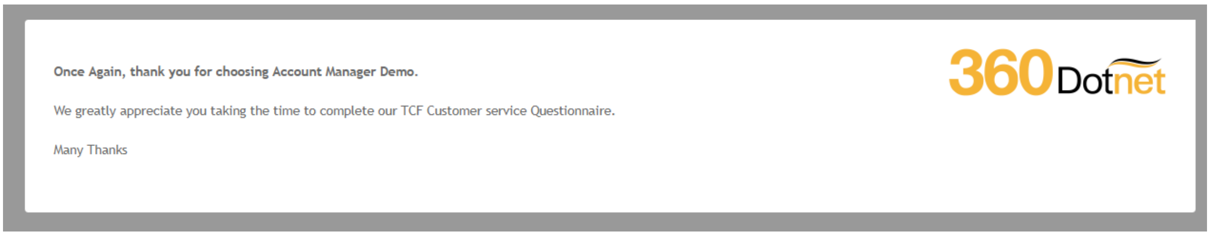

Your Advisor: David Wressell, Your Administrator: Tara Bird	
My adviser took the time to understand my circumstances and my financial needs	...Please Select
The advice my adviser gave me was clear and easy to understand	...Please Select 1 - Strongly Disagree 2 3 4
The product or service my adviser recommended met my needs	5 - Not Sure 6 7 8 9 10 - Strongly Agree
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	...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.

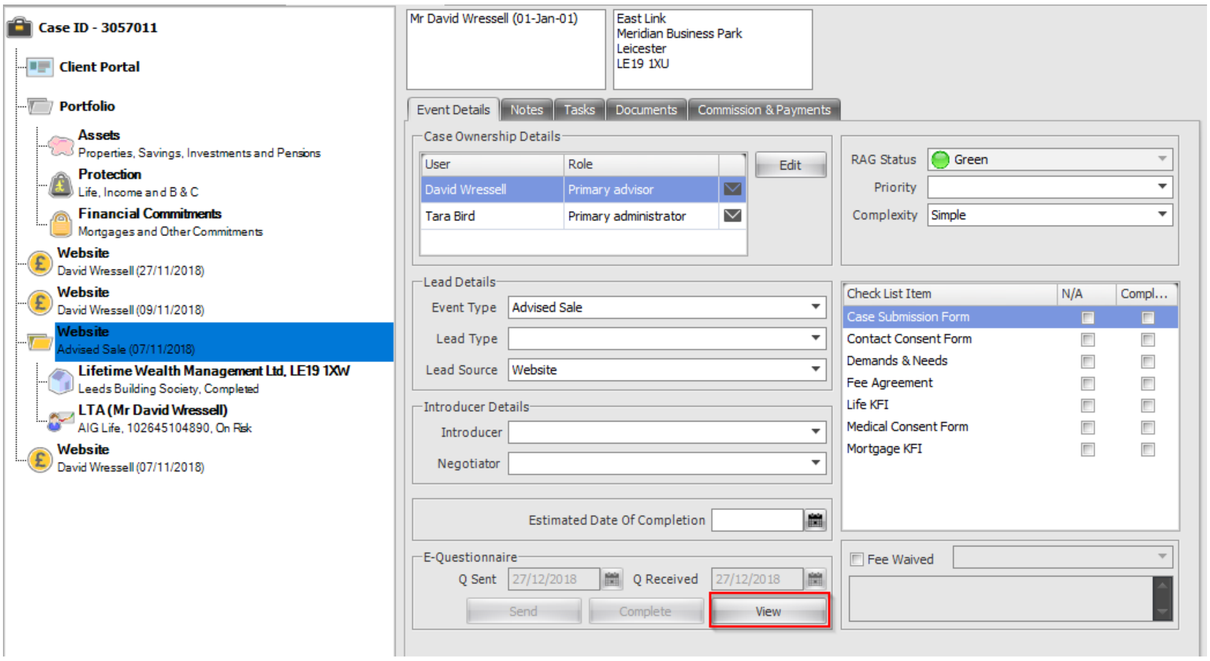

Additional Advice		
Moving House	Re Mortgage	Buy To Let
Mortgage Protection	Family Protection	Income Protection
Buildings And Contents	Pensions	Inheritance Tax Planning
Savings And Investments	Long Term Care	Private Medical Insurance
Wills		

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.



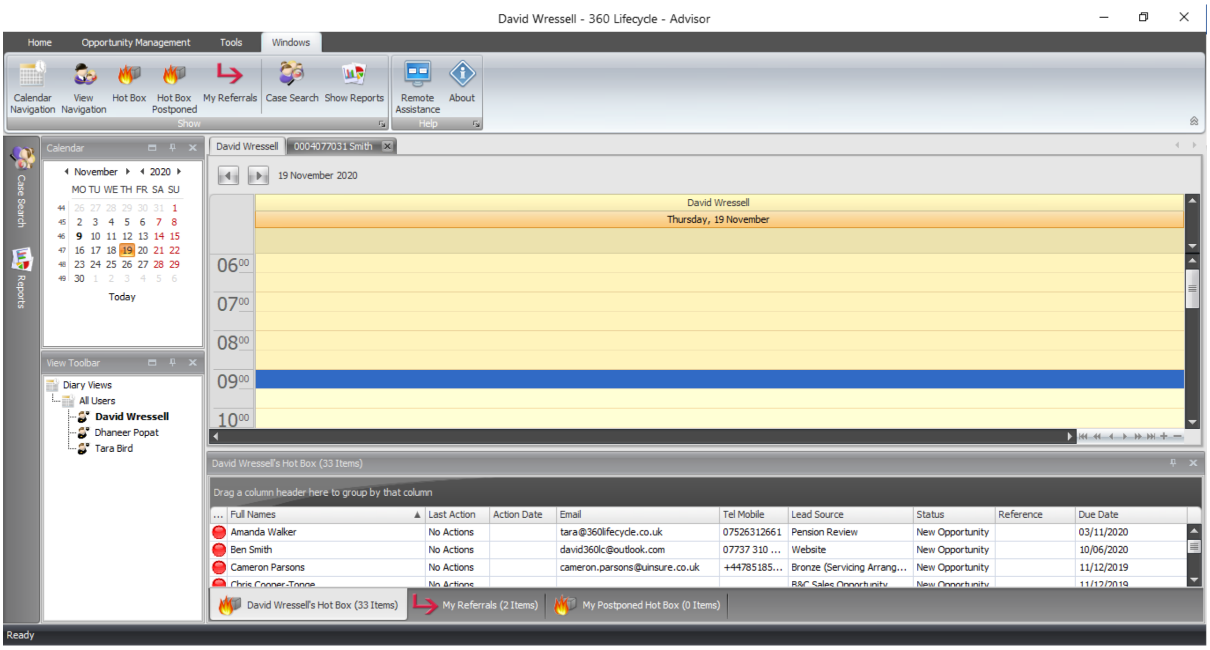
In order to view the TCF Questionnaire, simply return to the system and select **View** in the client’s case record.



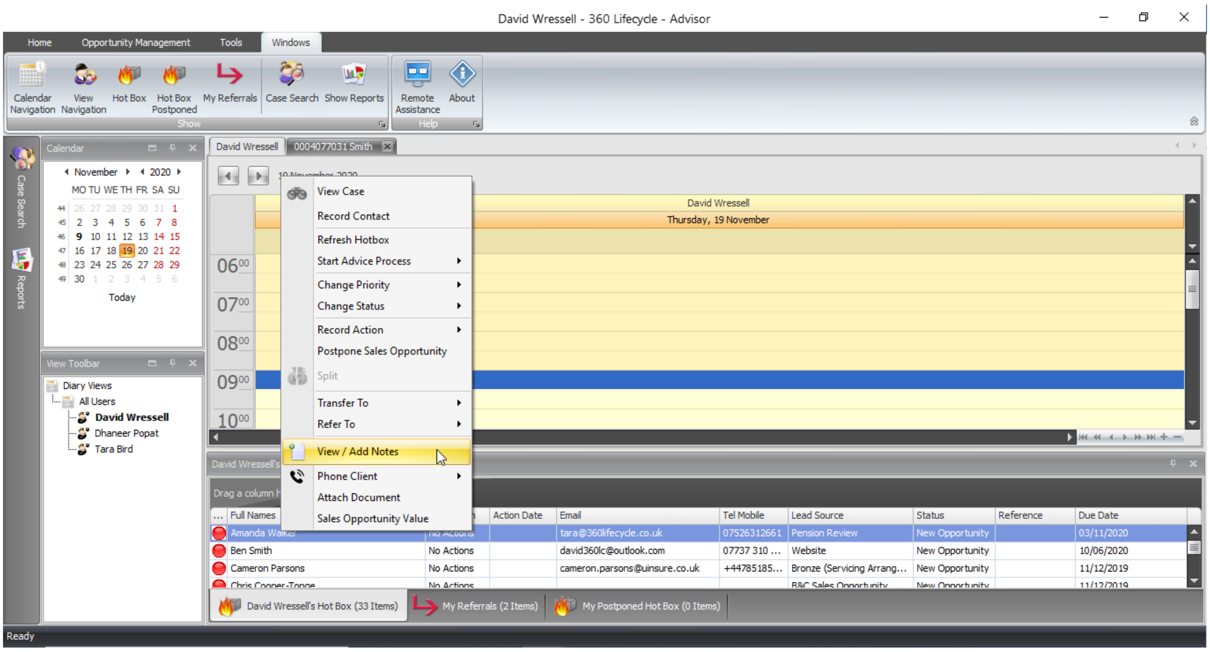
Once loaded, you can view the results.

2.6 Hotbox

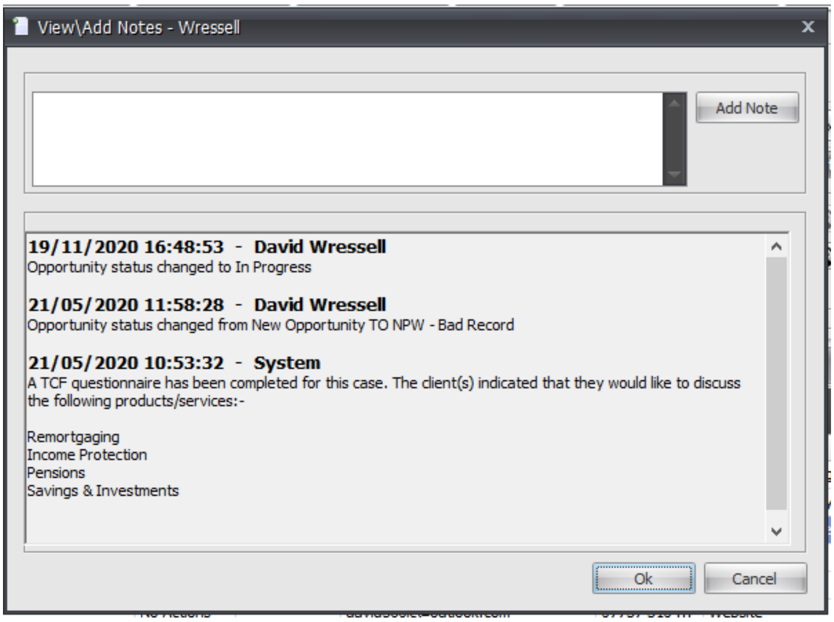
Note that any Additional Advice options that have been ticked will automatically create a sales opportunity for the Servicing Advisor on the case. In order to demonstrate this, simply log into Advisor via the icon on your desktop screen. You will now arrive at the landing screen.



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.