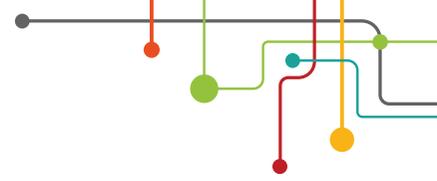
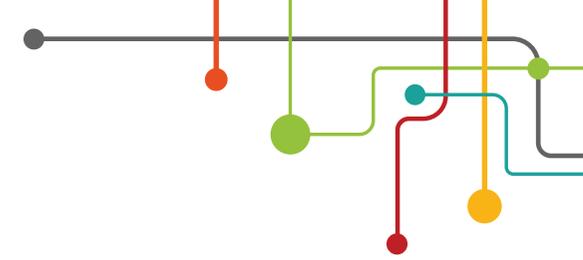


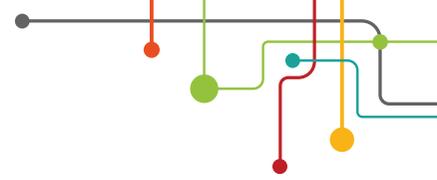
# HLPartnership CRM Handbook

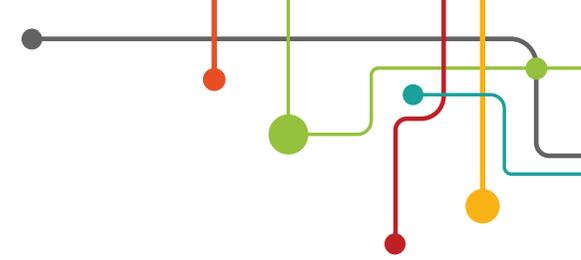




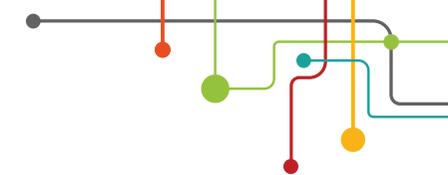
## Contents

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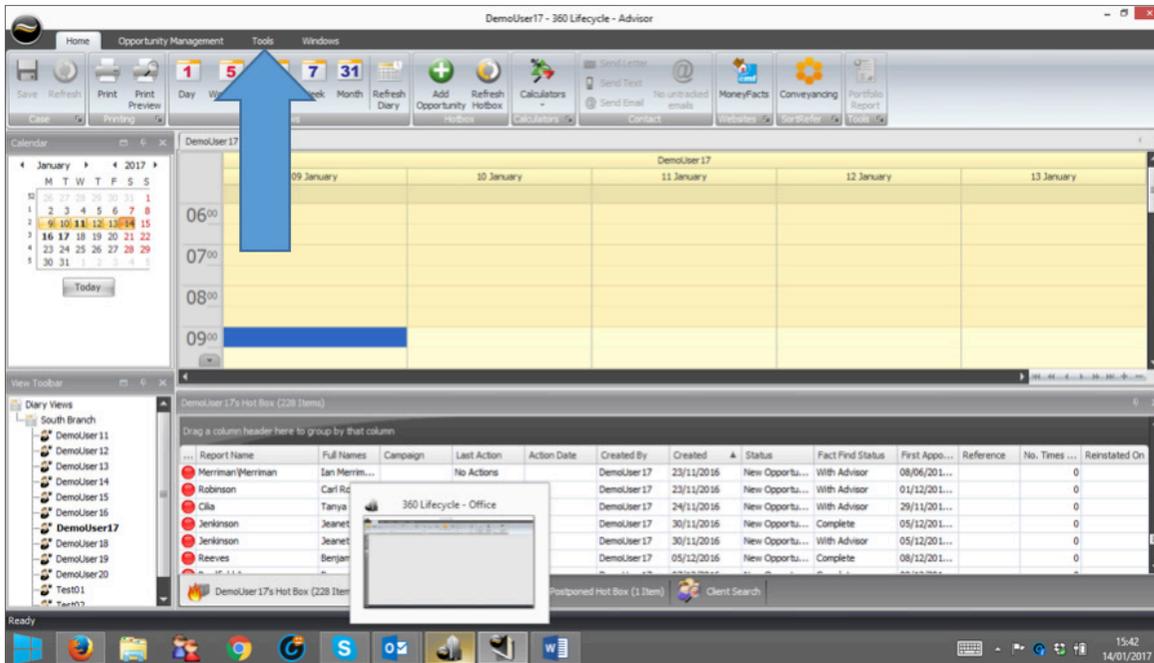
# HLPartnership CRM The Basics



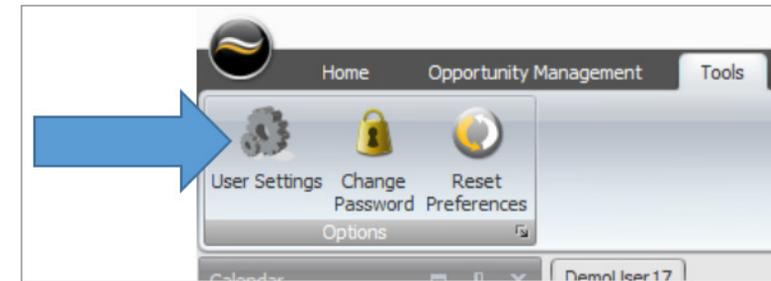
## Setting up

Ensure that you have the basic settings in place on your HLP CRM to ensure you have the relevant access for communication and marketing purposes.

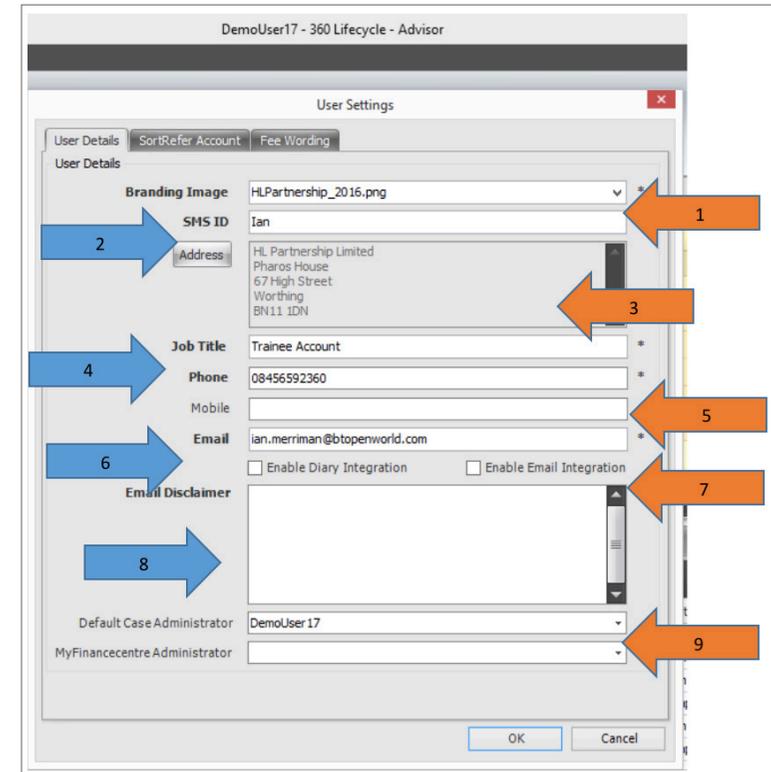
By accessing the Tools function on your CRM you can ensure your settings are as they should be:



After clicking 'Tools' click user settings from across the top ribbon:



From this screen you will be able to see the individual settings for that particular user:





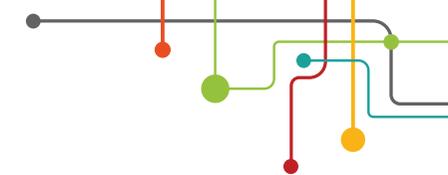
## Setting up

In the section:-

1. Ensure that your company logo has been added into the Branding Image area. To do this simply e-mail your company logo (In a jpg format or similar) to [support@360lifecycle.co.uk](mailto:support@360lifecycle.co.uk)
2. Make sure your SMS ID is as you wish it to be automatically portrayed on all SMS communications (Maximum 9 characters).
3. The address will have been set up for you centrally.
4. Make sure the Job Title is correct - this will automatically be used in any communication.
5. Make sure you have the correct telephone and mobile number in place - again these will automatically be used in any communication.
6. The e-mail address needs also to be accurate as again this will be used in all communication.
7. By ticking the 'Enable Diary Integration' and 'Enable Mail Integration' functionally to integrate this functionality is triggered enabling you to send e-mails from within the HLP CRM and automatically triggering the facility to auto save e-mails as documents to the client files plus integrating your diary with the HLP CRM.
8. By adding your company e-mail disclaimer into this section all e-mails generated from within the HLP CRM will have the disclaimer automatically attached to.
9. Ensure you have a default administrator set up as well - this could be the actual adviser - this will enable this individual to view all tasks and relevant admin functions.

Click OK to save any changes.

You are now in a position to communicate and market to your clients.



## New Leads – Setting up the initial opportunity

When a new lead is received it is important to record some basic client details into the HLP CRM as soon as possible in order that you at least have the opportunity to communicate and market that client going forward.

When adding an opportunity for the first time make sure that the four key data fields are recorded:

- Name/s
- Address
- Mobile Number (For texting as well as telephony contact)
- E-Mail address (For ease of contact, auditable communication and marketing)

**Add Sales Opportunity**

Client Search

Title & Forename

Surname

Address 1

Postcode

When adding the client within the Sales Opportunity – by adding the new client name and pressing next, the CRM system will check to see if the client is already a client of the firm or not. If they are a link is provided to open the existing client account thereby avoiding the duplication of a client.

**Add Sales Opportunity**

Client Search

Title & Forename

Surname

Address 1

Postcode

If not an existing client, click the 'Create New Client' button and press next.

You will then be asked to enter the address and contact information.

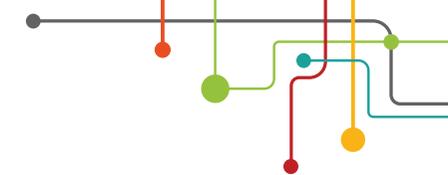
For the address, click the address button and simply key the postcode if known and press 'Find address' in the pop up box to instantly pre-populate the whole address. You have an option to manually key the address as well. Press OK once address is located.



## New Leads - Setting up the initial opportunity

The image illustrates the process of setting up an initial opportunity in a CRM system, showing three sequential steps:

- Step 1:** The 'Add Sales Opportunity' form is displayed. The 'Title & Forename' field is set to 'Mr David', and the 'Surname' field is 'Doolittle'. An orange arrow points to the 'Address' button.
- Step 2:** The 'Enter Address' dialog box is shown. The 'Postcode' field is 'NN14 1FB'. An orange arrow points to the 'Find Address' button.
- Step 3:** The 'Enter Address' dialog box is shown with the address populated: 'Address Line 1' is '10 The Paddocks', 'Address Line 2' is 'Stanion', and 'Town' is 'Kettering'. A blue arrow points to the 'OK' button.



## New Leads – Setting up the initial opportunity

The address is then recorded and you are then able to enter the contact information points i.e. the mobile number and e-mail addresses as a minimum.

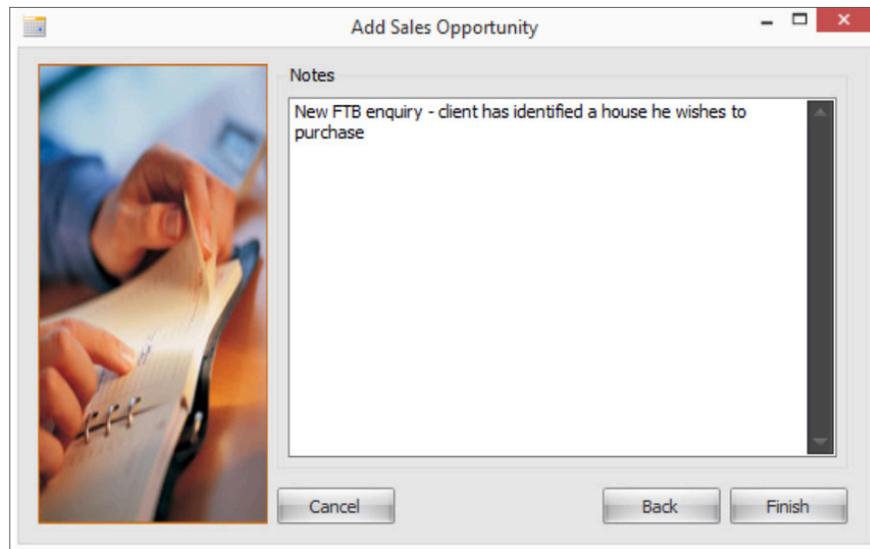
Click next and you will then be able to record additional information about the source of the lead, this could be generic information like 'Mortgage Review' but you can as a company request your own lead sources to be added so that you in turn can run reports against lead sources and particular campaigns. This will enable to you the success or otherwise of those campaigns and run MI on introducer sources.

If another adviser has referred the case this can also be recorded.

Clicking onto the next screen the user is then able to add some notes describing the nature of the opportunity.



## New Leads – Setting up the initial opportunity



The user can now click the Finish box.

A new client opportunity has now been added to the adviser's Hotbox.



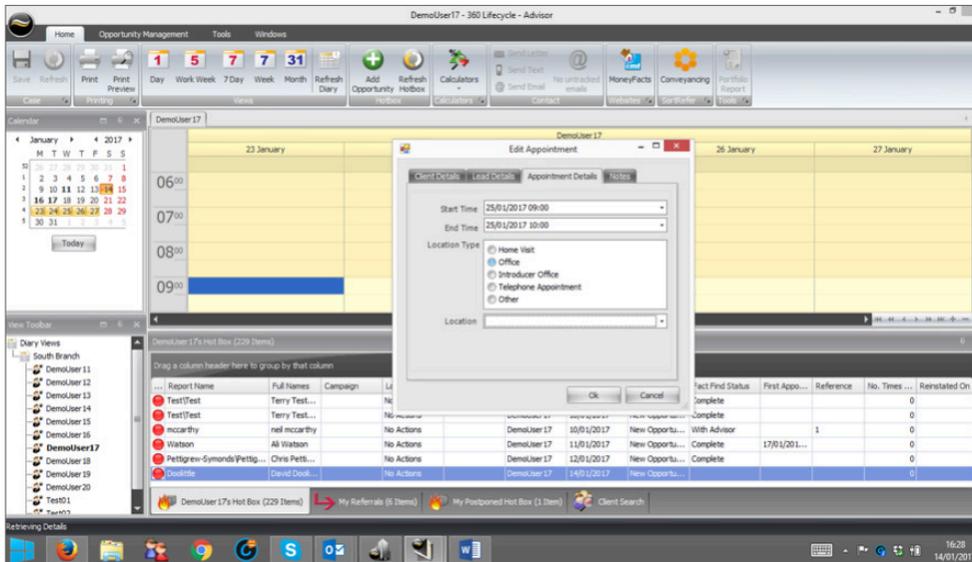
By adding the new opportunity and double clicking the calendar to make an appointment the CRM will automatically take you through the new client process and in addition will:

- Create an appointment within the diary
- Enable you to confirm that appointment by text starting the technology based sales process that is embedded into the HLP CRM

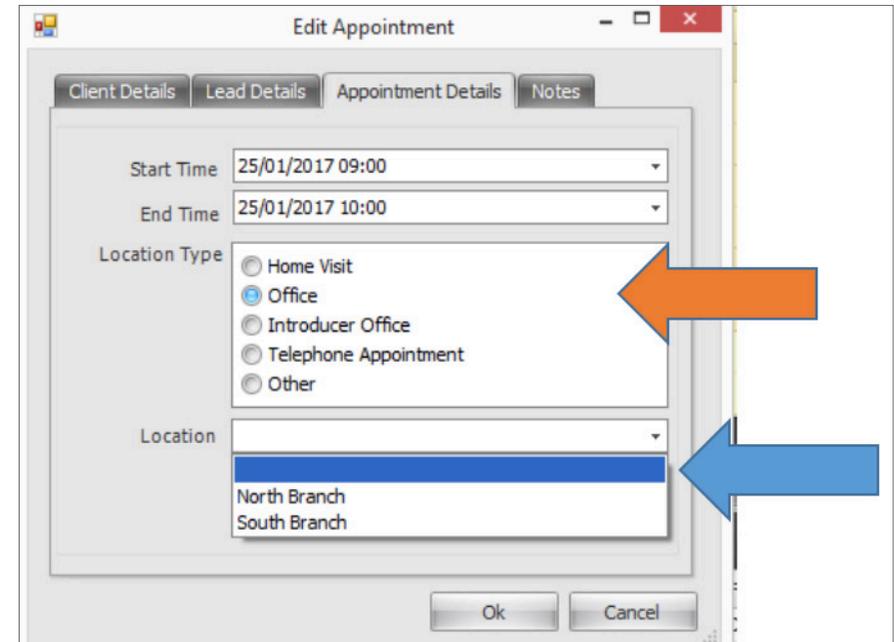
If an opportunity already exists in the Hotbox, that client can simply be dragged into the calendar to create the appointment.



## New Leads – Setting up the initial opportunity



A pop up box then asks you to confirm the location of the appointment:



Clicking onto the next screen the user is then able to add some notes describing the nature of the opportunity.



## New Leads – Setting up the initial opportunity

Importantly all HLPartnership firms are able to add their own different offices and Introducer Offices which enable you to select the correct venue for the appointment.

By selecting an appointment you also have the opportunity to send the prospective new client a confirmation of that appointment by text with some free text notes as well:

**Add Appointment**

Notes

Notify the client via SMS text message: 99 of 160 characters used

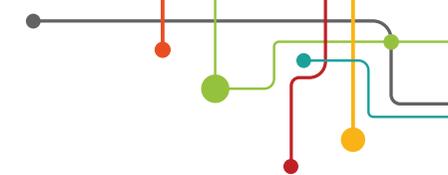
Your meeting with DemoUser 17 has been scheduled for 09:00 on 20/01/2017 at our North Branch office.

Cancel Back Finish

By pressing Finish, the CRM will then have:

- Sent the client a personalised text confirming the appointment including venue, creating a very professional experience.
- The appointment is embedded in your diary.
- You have a client account/opportunity now located within your Hotbox from which you can record activity and progress with the opportunity and are able to market to that client as required.

From this point the adviser is able to then link directly to the online Point of Sale System, setting up the fact-find and sending the client an invitation to complete the online fact-find:



## New Leads – Setting up the initial opportunity

This is done by highlighting the client within the Hotbox and right clicking:

This will open up the following screen view and pop-up boxes:

The screenshot shows a calendar view for January 23-25. A context menu is open over a client entry. The menu options are:

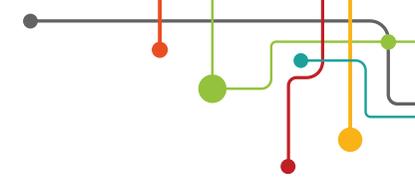
- View Case
- Refresh Hotbox
- Start Sales Process (highlighted)
  - Online Fact Find (highlighted)
  - Mortgage + Protection Fact Find
  - Protection Only Fact Find
- Change Priority
- Change Status
- Record Action
- Postpone Sales Opportunity
- Split
- Transfer To
- Refer To
- View / Add Notes
- Attach Document
- Sales Opportunity Value

Below the menu is a table of client entries:

Report Name	Full Name	Action Date	Created By	Created
Test\Test	Terry		DemoUser17	10/01/2017
mccarthy	neil m		DemoUser17	10/01/2017
Watson	Ali W		DemoUser17	11/01/2017
Pettigrew-Symonds\Pettig...	Chris		DemoUser17	12/01/2017
Doolittle	David Dooli...	NO ACTIONS	DemoUser17	14/01/2017
Doolittle	David Dooli...	No Actions	DemoUser17	14/01/2017

Select 'Start Sales Process' and 'Online Fact-Find' and the system will direct you to the online sales process.

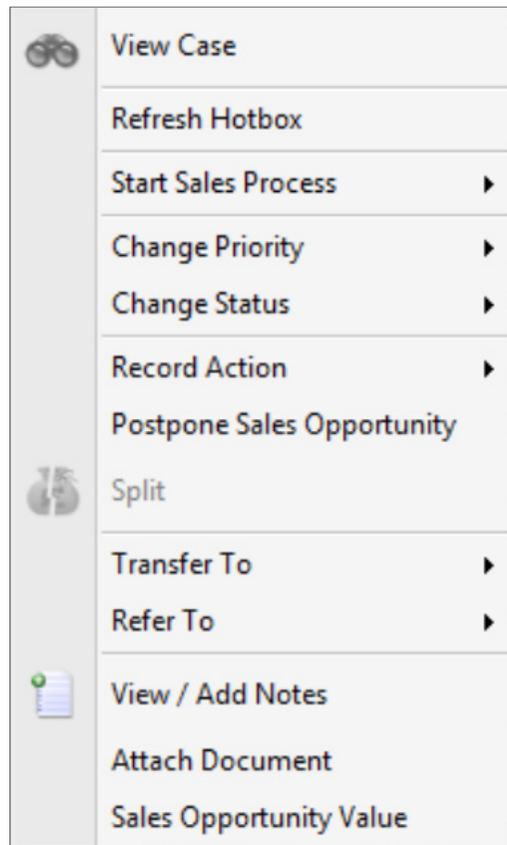
The screenshot shows the 'Doolittle' online sales process interface. The page title is 'Doolittle' and it is powered by '360LifeCycle'. The interface includes a navigation menu on the left with options like 'Sales Process', 'Applicants', 'Dependants', 'Income', 'Address History', 'Properties', 'Existing Mortgages', 'Existing Policies', 'Assets', 'Liabilities', 'Credit History', and 'Lifestyle Changes'. The main content area shows the 'Sales Process' details for a client named 'Doolittle', including the 'Creation Date' (14/01/2017 04:51 PM), 'Advised Type' (Advised Sale), 'Disclosure Method', and 'Sale Type'. There are also 'Required Client Documents' and 'Discussion Details' sections. A warning message at the top says 'Please fix the problems in the highlighted fields before attempting to submit this business.'



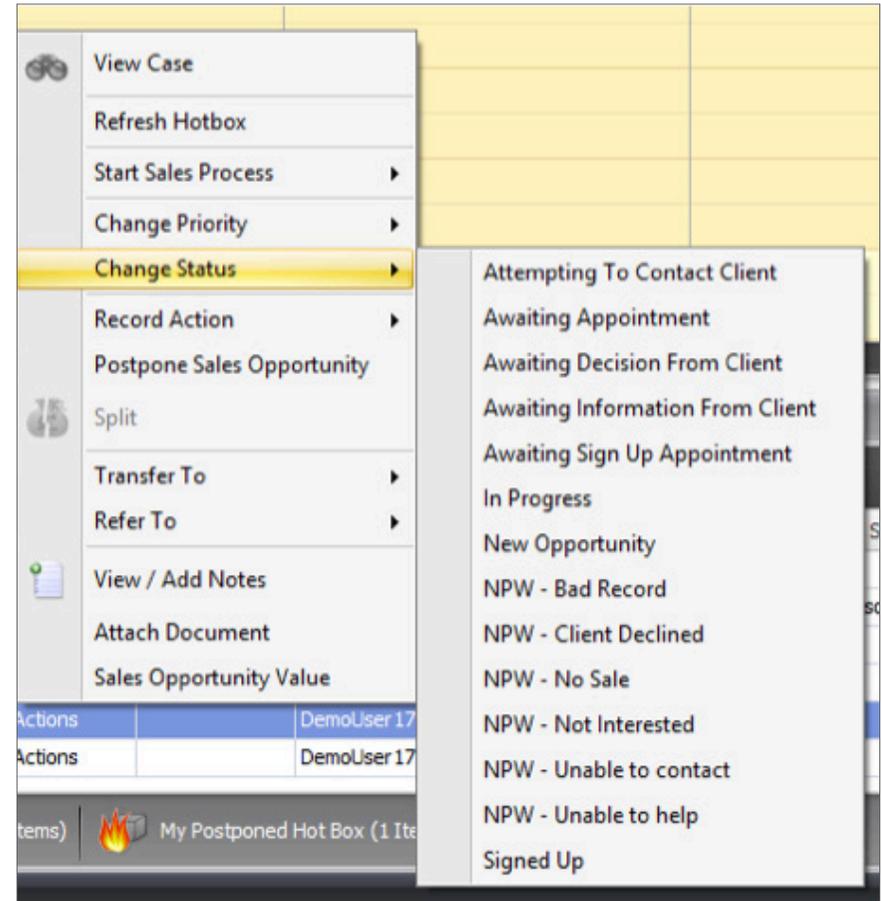
## Managing the HotBox

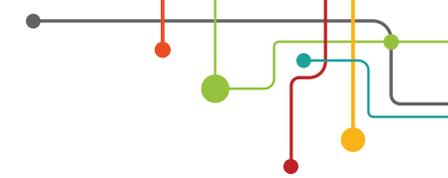
It is important from a marketing and MI point of view to effectively manage your Hotbox, also so that accurate reports can be run and marketing opportunities identified as well.

By right clicking on any client a pop up box is created:



Clicking on Change Status will create another pop up box





## Managing the HotBox

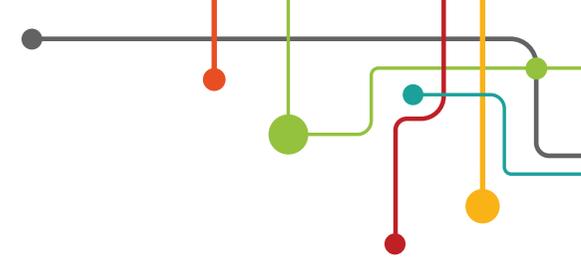
This will allow the user to update the status of the case. Selecting an NPW option will remove the client/opportunity from the hotbox but the client data will still be held in the system for marketing purposes.

Selecting the Postpone Sales Opportunity ribbon will allow the adviser to select a date to re-contact the client and add a note to explain why the opportunity is postponed:

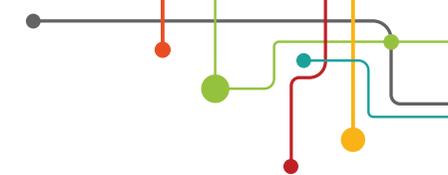
The client will then be temporarily removed from the adviser hotbox and will re-appear on the said date as a new opportunity/lead on the agreed date as a reminder for the adviser to contact.

At any time the adviser is able to view and add notes to any of their opportunities:

Maintaining accurate records in the client file and on products will enable accurate reports, tasks and marketing opportunities to be run.



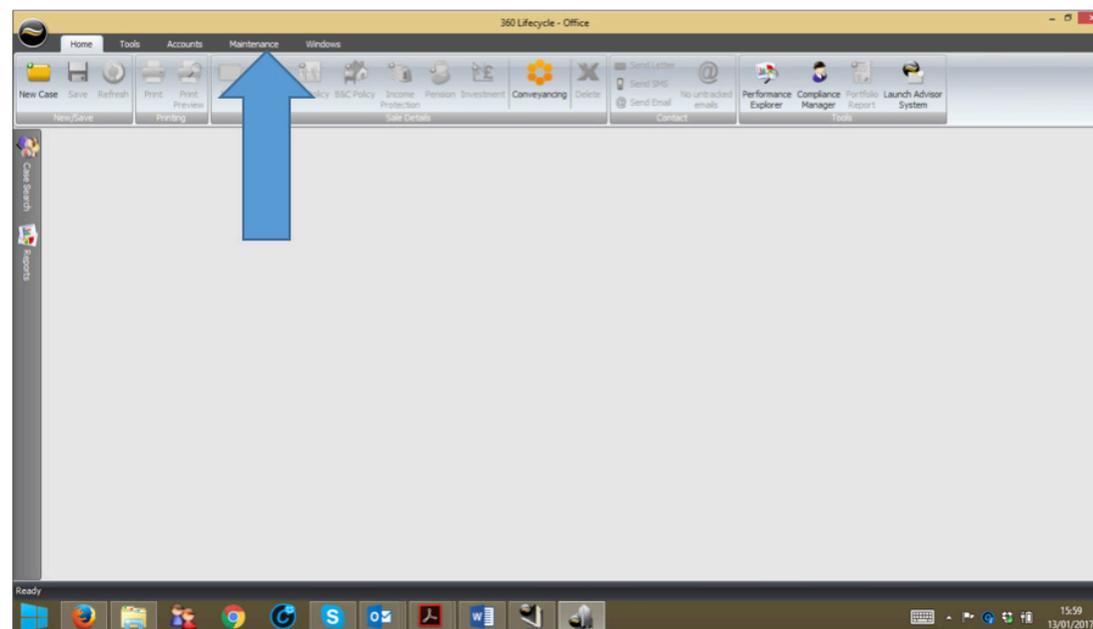
# HLPartnership CRM Letter Templates



Letter templates are found in 360 Office under the 'Maintenance' 'General' tab in 'Standard Letters'. Letter templates are used when sending a letter from a case record.

Click on the 'maintenance' tab in the first instance.

**Please note you must have the 'Maintenance' option in order to send letters from within the CRM.**

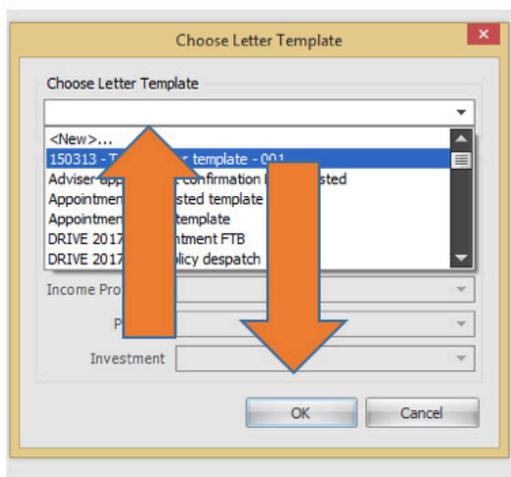
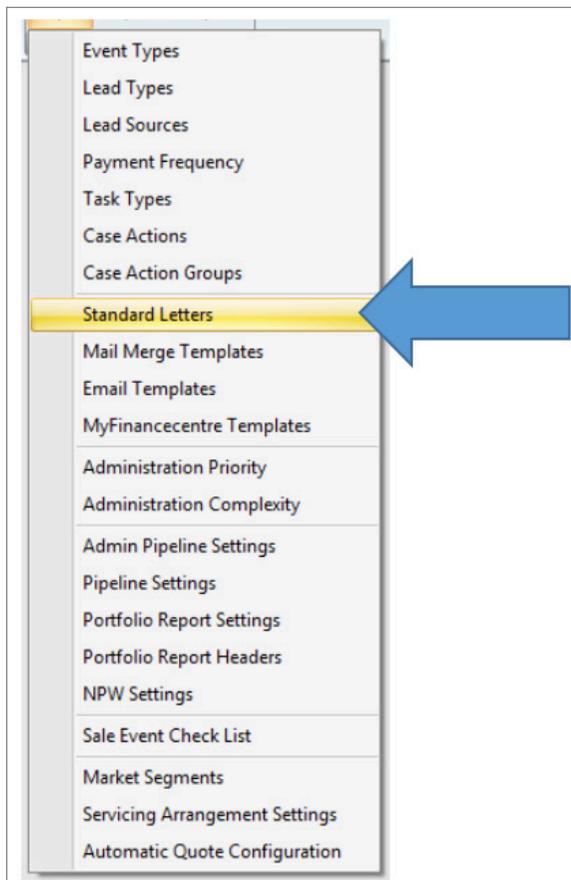
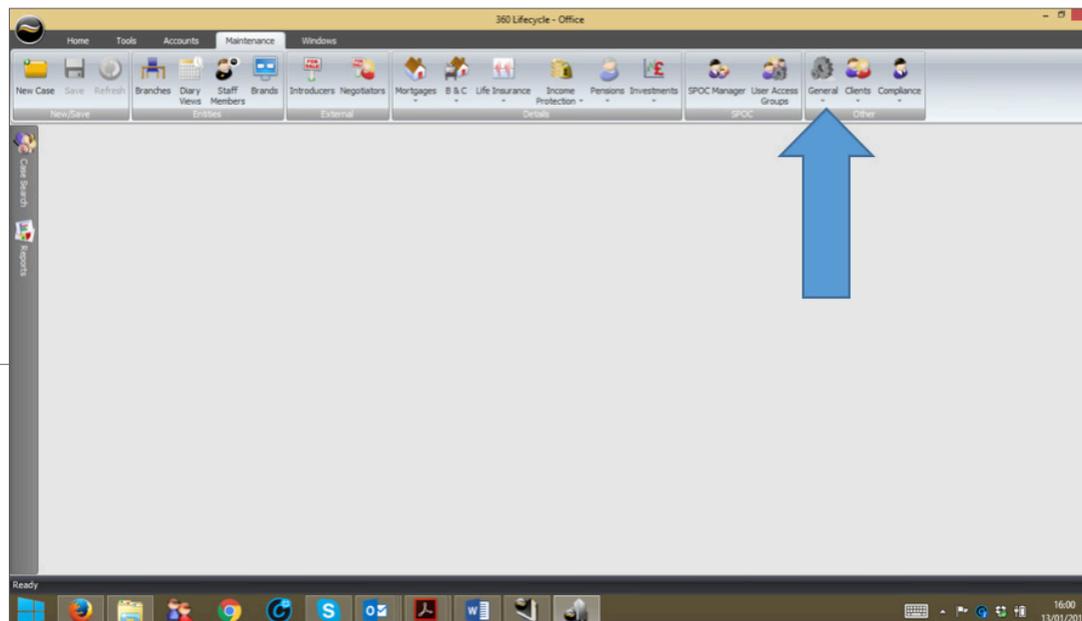




### Adding a new letter template.

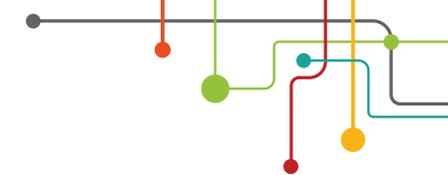
This will take you through to a new screen and you will now need to click on the 'General icon'.

This will create a drop down box as shown below.



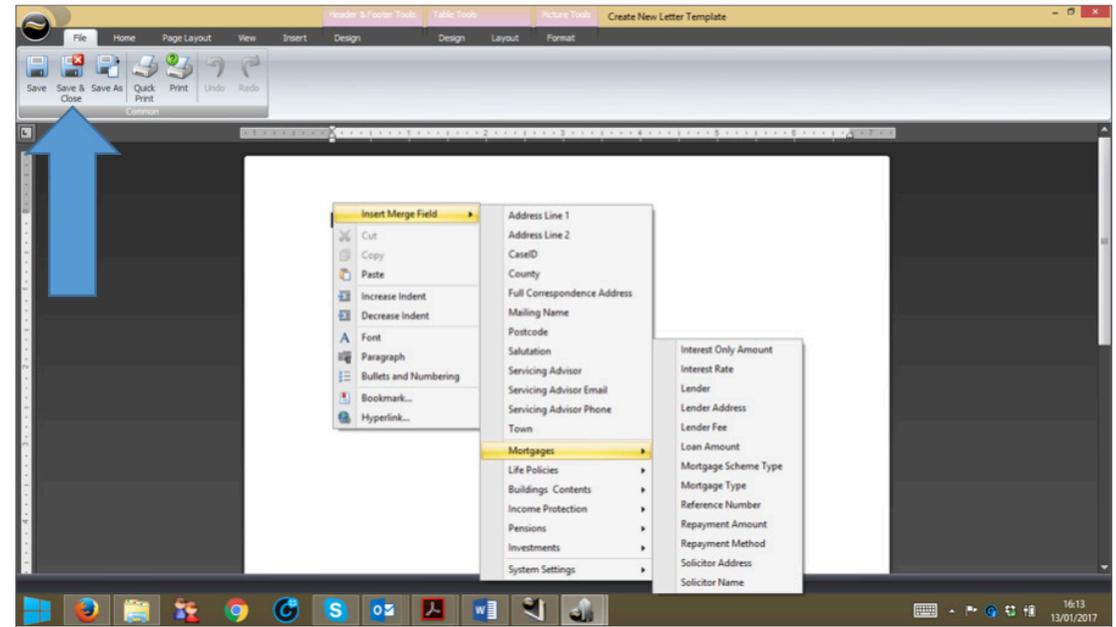
To add a new letter template click on '**Standard Letters**' under the general tab in 360 Office.

Select **<New>...** from the drop down menu and then click on **Ok**. This will open up the Letter Template editor screen.



Simply type out and format your letter into the template. By navigating through the Home, Page, Layout, Insert, Design and Format tabs, you can tailor the letter template specifically to your needs.

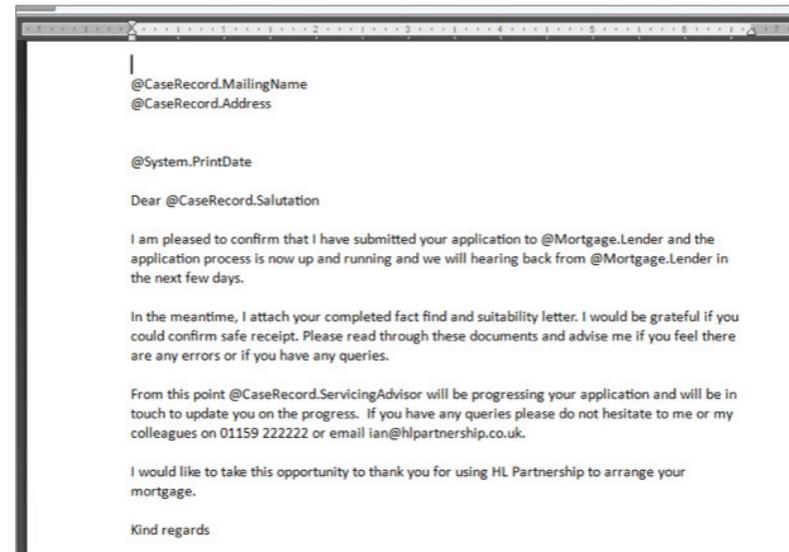
You can add a variety of mail merge fields into your template by right clicking on the document and selecting 'Insert Merge Field' from the menu.



Once you have created a new letter template simply press Save & Close (Giving the file a name) and a new letter template is created.

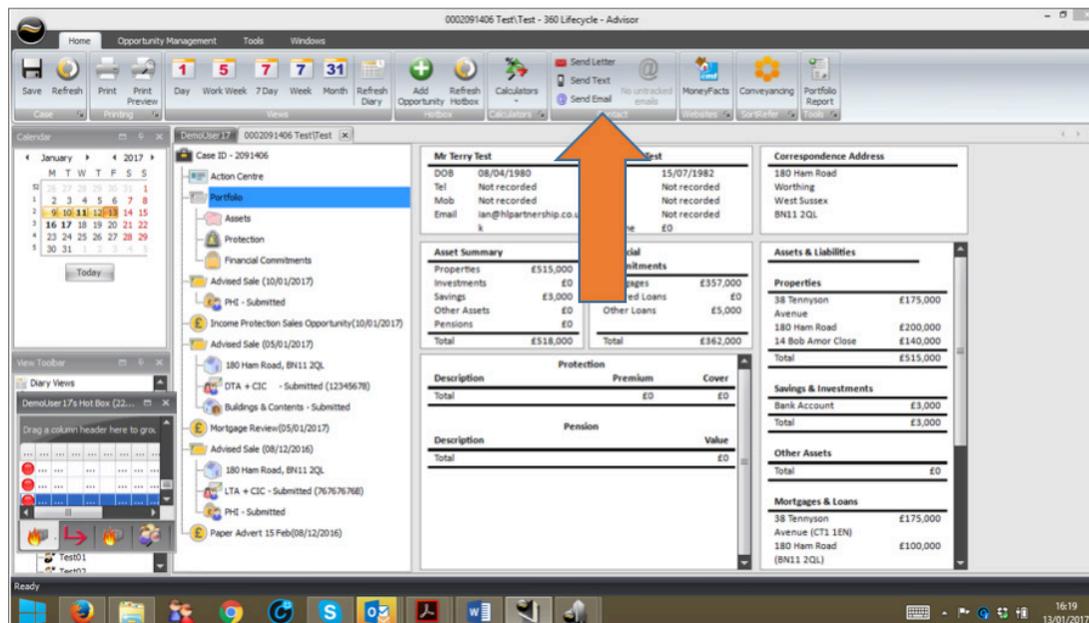
By pressing 'Save as' you can create a copy of the document in your own computer files.

Once the template has been saved this can be accessed from within a client account within the adviser function.





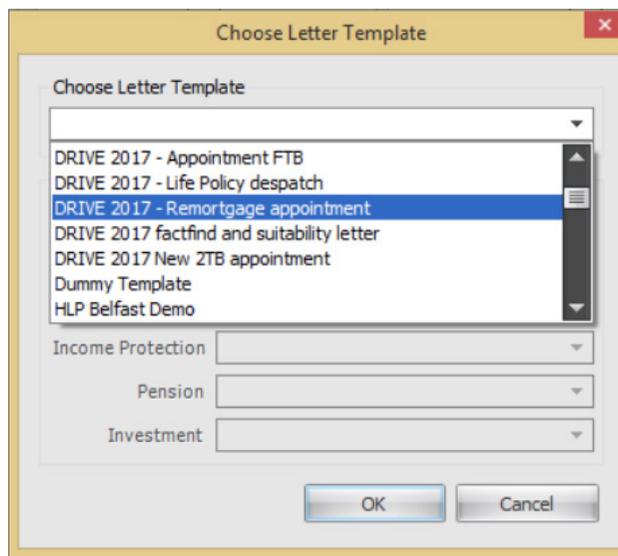
## In Adviser function

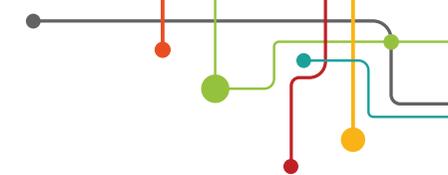


Once a client account is open the contact functions become active including:

- Send letter
- Send text
- Send email

By simply clicking the send letter function this will then create a drop down box of all the letter templates:

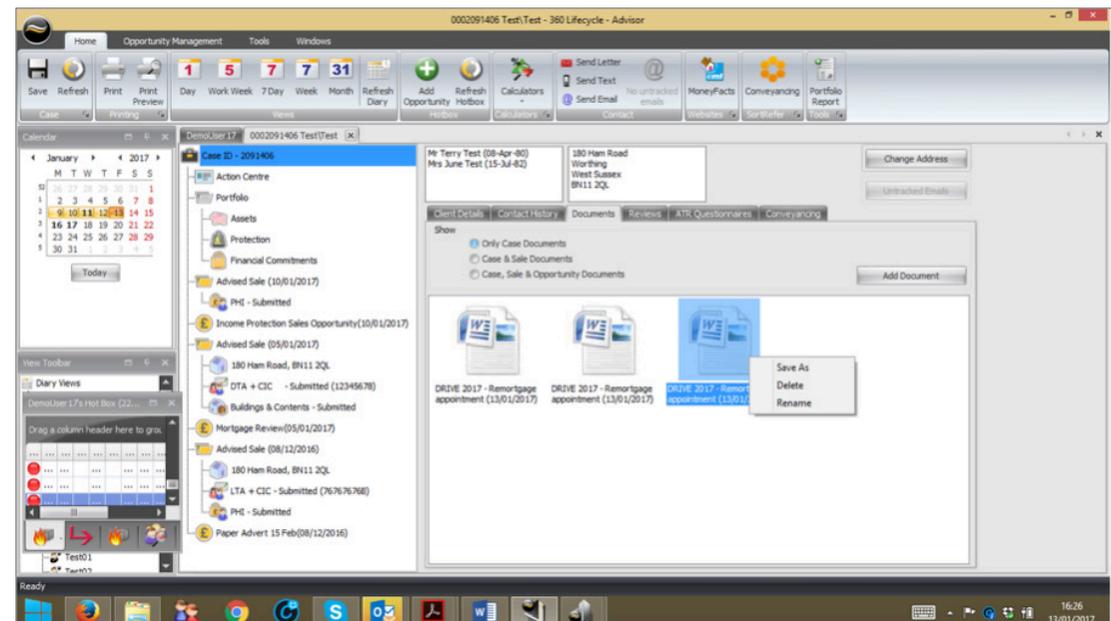
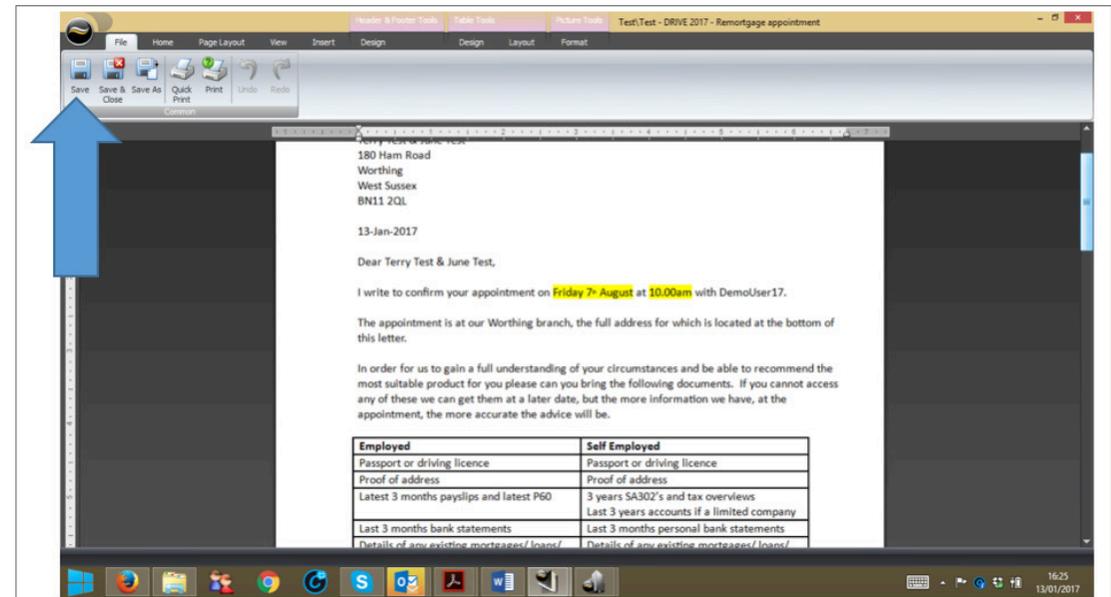




Select the letter template required, press OK and the system will generate the letter for you:

Pressing save will save the document to the client file to the Case ID under documents as shown here:

Right click on the document to 'Save as' to your computer if required.

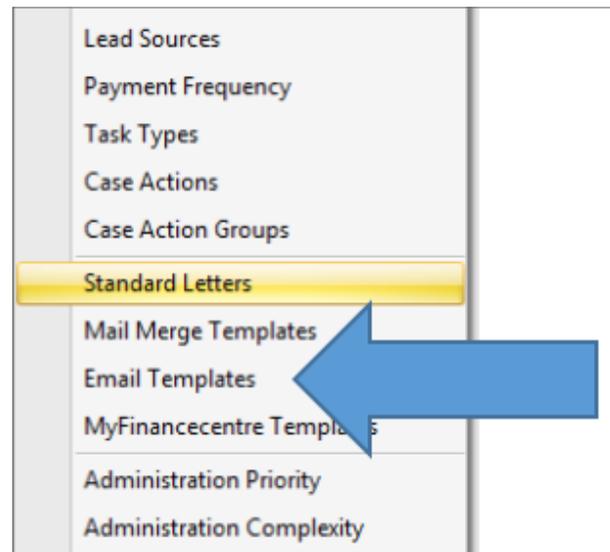
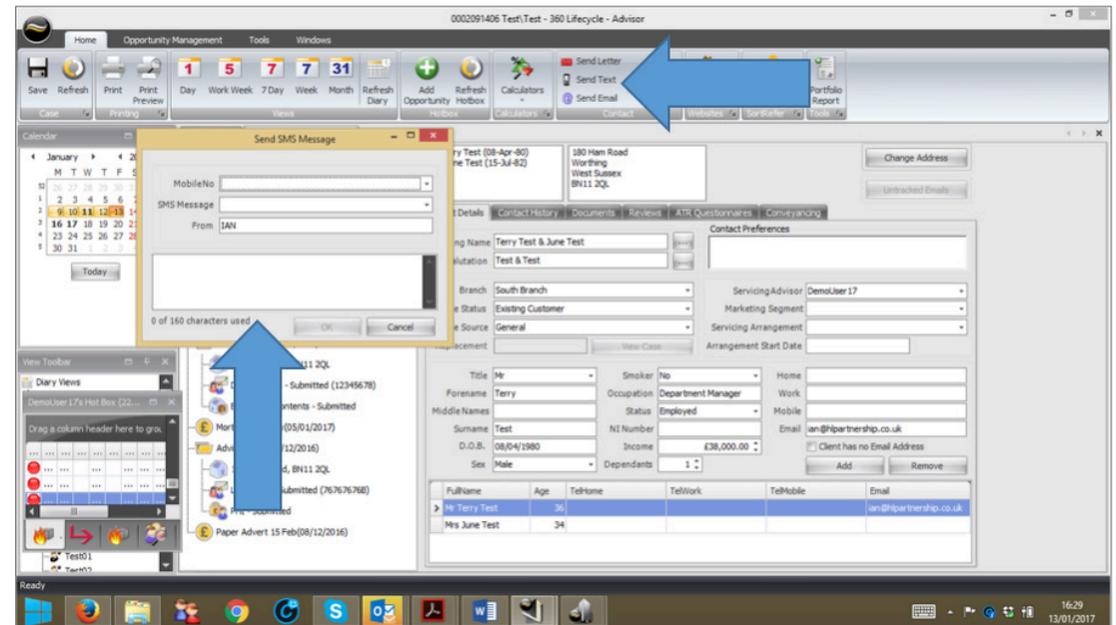


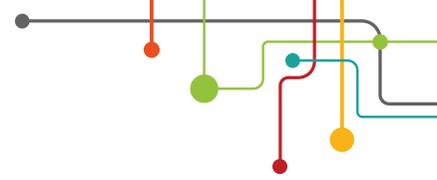


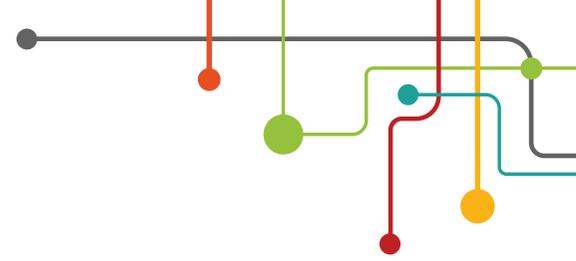
Sending Texts is broadly similar – you will need to have a mobile number in the client record of course but simply Select Send Text and enter the text message (160 character maximum).

Then when you are happy press ‘OK’ and the text will be sent for you.

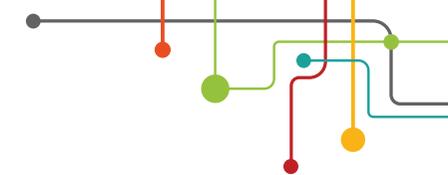
To create E-mail templates you will need to be subscribed to Campaign Manager Functionality.







# HLPartnership CRM TCF/Customer Survey Questionnaires



## How to create a client questionnaire

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

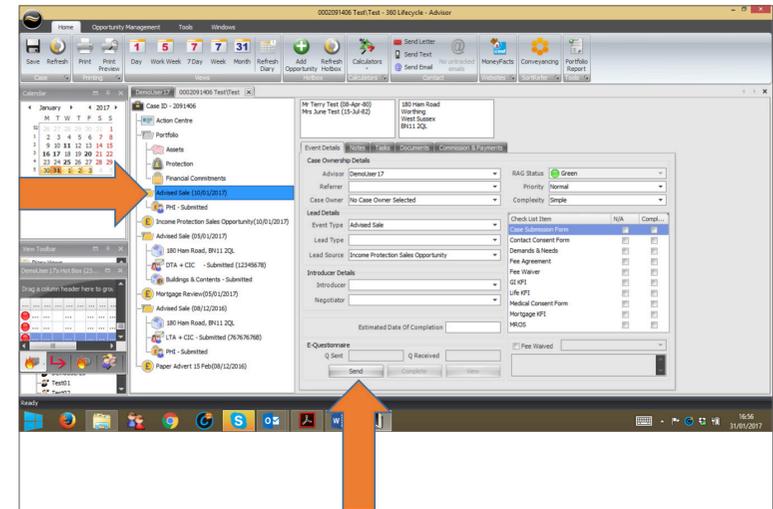
The TCF Questionnaire is a simple yet effective E-Questionnaire facility which can be sent from the specific HLP CRM case record on completion of a sale event.

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.

A specific case record can be opened up in Adviser or in Office (By searching for that client).

Simply open a clients' case record in the first instance and then click on the 'Advised Sale' that you would like the E-Questionnaire to refer to.

Please note: A questionnaire can only be sent once the advice process has been completed.



To send the questionnaire all that needs to be done is for the Send button to be clicked as shown in the above screenshot.



## How to create a client questionnaire

This will then automatically generate the questionnaire and this is sent immediately to the clients registered e-mail. It is therefore important that the clients correct e-mail address is recorded and also the clients' mobile number is recorded. When the questionnaire is sent the client will receive both an e-mail and a text advising that they have been sent the questionnaire with an invite for them to complete and return.

Once the sent button is clicked you will be presented with the following screen:

The screenshot shows a software interface with a 'Select Questionnaire' dialog box open. The dialog box has a dropdown menu for 'Questionnaire' set to 'HLPDemo' and a checkbox for 'Paper Questionnaire Sent'. Below the dialog box, the main form has sections for 'Introducer Details' (with fields for 'Introducer' and 'Negotiator'), 'Estimated Date Of Completion', and 'E-Questionnaire' (with 'Q Sent' and 'Q Received' fields). A 'Send' button is visible in the 'E-Questionnaire' section. A smaller 'E-Questionnaire' dialog box is also shown, with 'Q Sent' set to '31/01/2017' and 'Q Received' empty, with 'Send', 'Complete', and 'View' buttons.

Simply click the questionnaire that is relevant – usually just your company name, and the CRM system will automatically record the fact that the questionnaire has been sent and this will also trigger the reminder e-mail and text to the client.

The client will receive the following e-mail inviting them to complete the questionnaire:

*Dear Mr Terry Test*

*Here at HLPDemo 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 it's good or bad we would like to hear your opinion.*

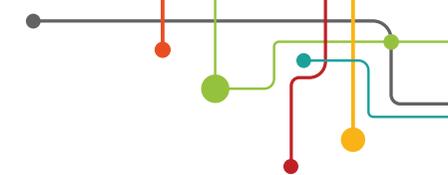
*Simply [click here](#) to complete our customer satisfaction survey.*

*Regards*

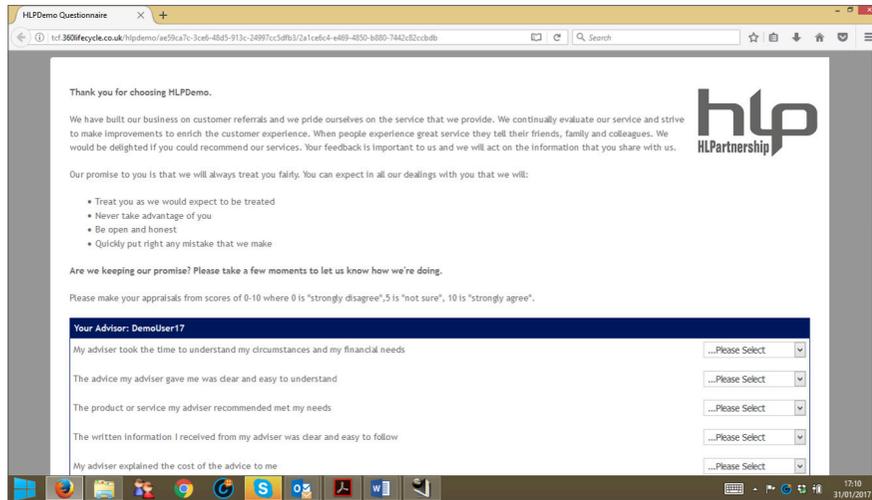
*HLPDemo*

Clearly the e-mail will be appropriately worded and branded relevant to the adviser and firm sending the correspondence.

The client simply ticks the 'click here' link and the questionnaire opens for them to complete.



## How to create a client questionnaire



**HLP Demo Questionnaire**

Thank you for choosing HLP 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: DemoUser17**

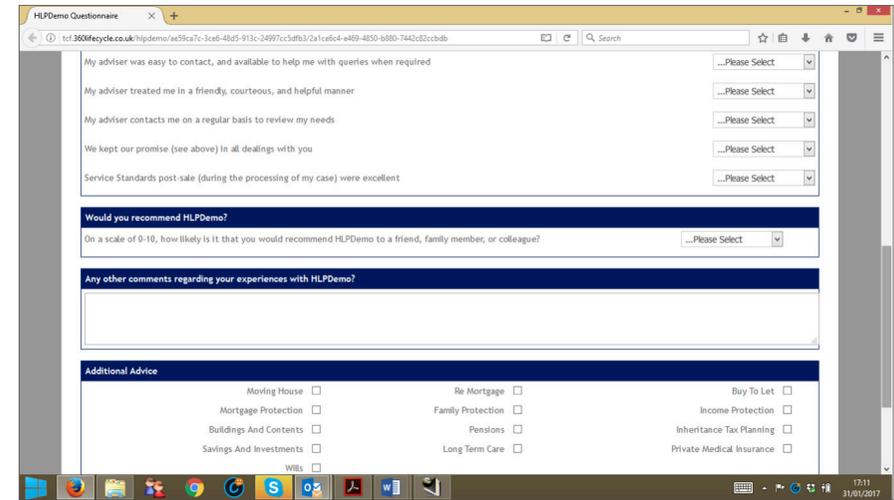
My adviser took the time to understand my circumstances and my financial needs

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 HLP Demo?**

On a scale of 0-10, how likely is it that you would recommend HLP Demo to a friend, family member, or colleague?

**Any other comments regarding your experiences with HLP Demo?**

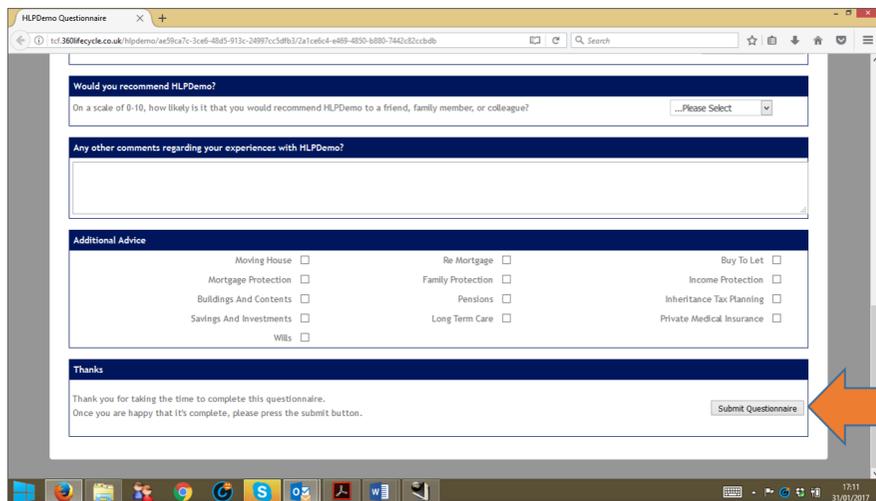
**Additional Advice**

<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"/> 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		

The client is able to answer the questions from 1-10 with 10 being the highest score and are additionally invited again on a scale of 1-10 whether they would be happy to recommend the adviser to friends and family. They are also able to add their own comments in a free text and also request additional advice.



## How to create a client questionnaire



**HLP Demo Questionnaire**

Would you recommend HLP Demo?  
On a scale of 0-10, how likely is it that you would recommend HLP Demo to a friend, family member, or colleague? ...Please Select

Any other comments regarding your experiences with HLP Demo?

**Additional Advice**

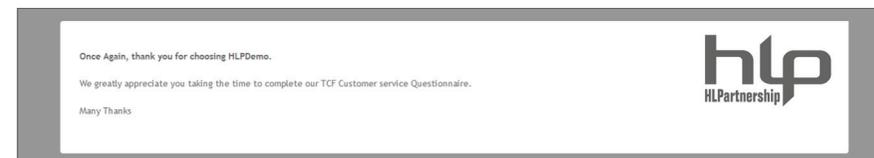
Moving House <input type="checkbox"/>	Re Mortgage <input type="checkbox"/>	Buy To Let <input type="checkbox"/>
Mortgage Protection <input type="checkbox"/>	Family Protection <input type="checkbox"/>	Income Protection <input type="checkbox"/>
Buildings And Contents <input type="checkbox"/>	Pensions <input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

**Thanks**

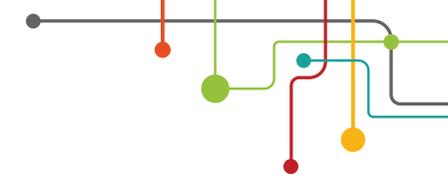
Thank you for taking the time to complete this questionnaire.  
Once you are happy that it's complete, please press the submit button.

**Submit Questionnaire**

Once the client has completed the questionnaire, the client clicks on the 'submit questionnaire' button and the client will receive a thank you.



It is important that a partner firm has uploaded their own company logo to the HLP CRM so that the questionnaire and related correspondence is automatically branded with that firms' logo.



# How to create a client questionnaire

**Client Name:** Terry Test & June Test  
**Event Date:** 10/01/2017  
**Case ID:** 2091406

**hlp**  
 HLP Partnership

The administrator on my case handled everything in a friendly and efficient manner	8
My adviser took the time to understand my circumstances and my financial needs	8
The advice my adviser gave me was clear and easy to understand	9
The product or service my adviser recommended met my needs	7
The written information I received from my adviser was clear and easy to follow	9
My adviser explained the cost of the advice to me	7
My adviser was easy to contact, and available to help me with queries when required	8
My adviser treated me in a friendly, courteous, and helpful manner	9

The Client's case record is now updated to record the fact that the questionnaire has been received and when. (See the blue arrow on the screenshot here).

Additionally, the adviser is now able to view the clients' questionnaire in full by clicking on the view button as indicated by the green arrow, providing them with an opportunity to use that data accordingly and respond to any feedback.

Where a client has requested additional information for other products and services within the questionnaire the HLP CRM will instantly record a new opportunity in the adviser's hotbox, and will note the opportunity in the client case record (as noted by the orange arrow in the screenshot on the top of this page).

**31/01/2017 17:15:20 - System**  
 A TCF questionnaire has been completed for this case. The client(s) indicated that they would like to discuss the following products/services:-  
 Buy to Let  
 Wills



## How to create a client questionnaire

...	Report Name	Full Names	Campaign	Last Action	Action Date	Created By	Created	Status	Fact Find Status	First Appo...	Reference	No. Times ...	Reinstated On
	Test\Test	Terry Test...	TCF Question...	No Actions		System	31/01/2017	New Opportu...				0	
	Test\Test	Terry Test...	TCF Question...	No Actions		System	31/01/2017	New Opportu...				0	

The adviser and the firm are able therefore to contact their clients in a timely and efficient way and are able to use the questionnaire for potential new business/new opportunities and to utilise the data/results for potential marketing opportunities also.

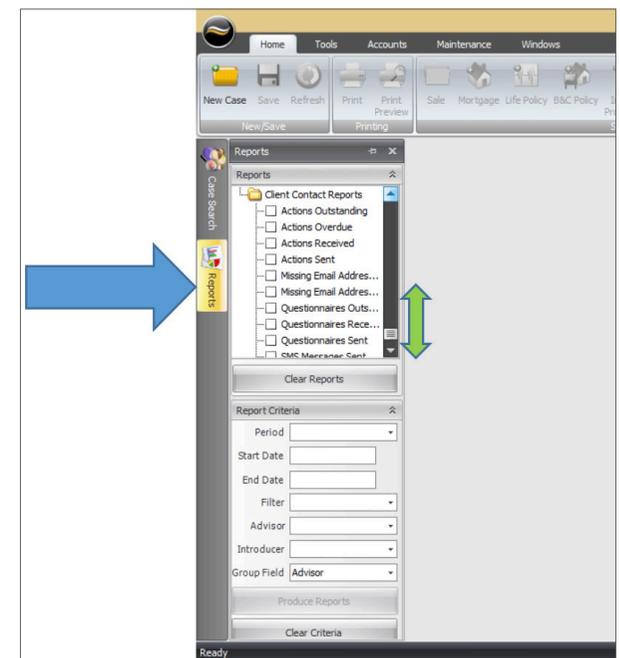
### Management Reports on E-Questionnaires

In addition to this the firm is able to run 3 different reports within the HLP CRM based upon the E-Questionnaires:

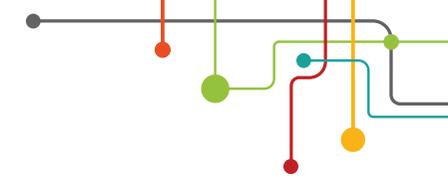
- Questionnaires Outstanding
- Questionnaires Received
- Questionnaires Sent

The reports are all located within the Office version of the HLP CRM and are accessed with the appropriate user permissions.

You now need to click on the reports section of the Office HLP CRM and scroll down to the 'Client Contacts Report' section, where the 3 reports are located. Select the report required.



The user can determine the report criteria to refine the management report and then click on the 'Produce Report' button.



# How to create a client questionnaire

The screenshot shows the 'Reports' menu in the HLP CRM. A blue arrow points to the 'Questionnaires Received' option, which is checked. A green arrow points to the 'Produce Reports' button. A blue double-headed vertical arrow indicates the transition from the menu to the report view.

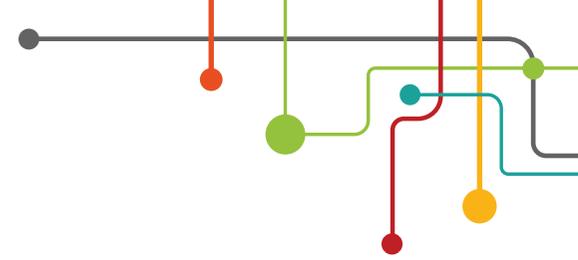
The screenshot shows the report output for 'DemoUser17'. The report title is 'Questionnaires Received Grouped By Advisor' for the period '01/01/2017 - 31/01/2017'. The HLP logo is visible in the top right. The report contains a table with the following data:

Case ID	Client	Sent	Received	Advisor Rating	Advisor Understanding	Advisor Availability	Advisor Friendly & Helpful	Regular Contact	Product Needs	Clear with needs	Costs Explained	Advisor Availability	Advisor Friendly & Helpful	Regular Contact	Paper Copy
0001604769	Merriman/Merriman	17/01/17	19/01/17	9	9	8	8	8	8	8	8	9	9	10	<a href="#">View</a>
0001604769	Merriman/Merriman	16/01/17	16/01/17	9	8	9	10	7	8	10	8	8	10	9	<a href="#">View</a>
0002091406	Test/Test	31/01/17	31/01/17	8	8	8	7	9	8	8	7	8	8	9	<a href="#">View</a>

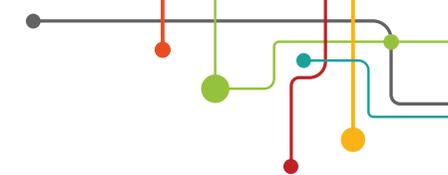
The 'View' links in the last column are circled in red.

Once the report has been produced the user will immediately have an overview produced on screen showing all the results and allowing the user to click on each report individually by selecting 'view' (see red highlight above).

Using the reports you are able to monitor all the e-questionnaires as appropriate within the HLP CRM.



# HLPartnership CRM System Generated Reviews and Key Data Fields



**360 Lifecycle automatically generates your future sales opportunities based on key dates entered against each policy record.**

**These opportunities are generated overnight and will appear in the servicing adviser's hotbox for them to action accordingly. The triggers for each product are as follows:**

### Mortgages

Mortgage reviews are generated 90 days before the end of the mortgage.

Simply click on any mortgage product within a client account to obtain information on that particular mortgage product.

For products that have a distinct end date on a product, the 'Penalties End' date will be automatically pre-populated with that date.

Please note that for products that have no distinct end date and instead have a fixed term which starts on the completion date of the mortgage, the 'Penalties End' date field is not automatically pre-populated.

In these instances the 'penalties end' date will need to be manually keyed.

The screenshot displays the 360 Lifecycle Adviser interface for a mortgage product. Key elements include:

- Hotbox:** A yellow arrow points to the 'DemoUser 17's hot box (22...)' which lists mortgage products.
- Status Buttons:** Red arrows point to 'Completed' and 'Offered' buttons in the top right of the mortgage details panel.
- Penalties End:** A green arrow points to the 'Penalties End' date field, which is pre-populated with '02/03/2019'.
- Status Callout:** A red callout box indicates 'Status is auto completed'.



As mentioned previously, mortgage reviews are generated 90 days before the end of the mortgage, the HLPartnership firm though can request that this be changed for all mortgages simply by notifying the 360 Lifecycle Support Team i.e. moving the date to 120 days beforehand may prove useful in getting ahead of a lender's retention team.

Should the adviser wish to bring forward the review date on a specific case by case basis, enter a new earlier date in the 'End Date' data field and this date will override any date in the 'Penalties End' data field.

If neither the 'End Date' nor the 'Penalty End Date' are entered then the system will generate a review two years after the 'Completion Date'.

The adviser is then notified of the review by the addition of a lead/opportunity in their hotbox automatically. Please remember to order your Hotbox data by the 'Created By' column so that all your latest leads are easy to identify.

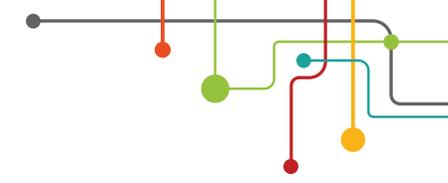
### **Key Data:**

It is important that a business is able to keep a record on business and therefore to know which mortgages have been offered in your business and which mortgages have completed is exceptionally important.

Ensure that the data fields highlighted in red are completed on every occasion:

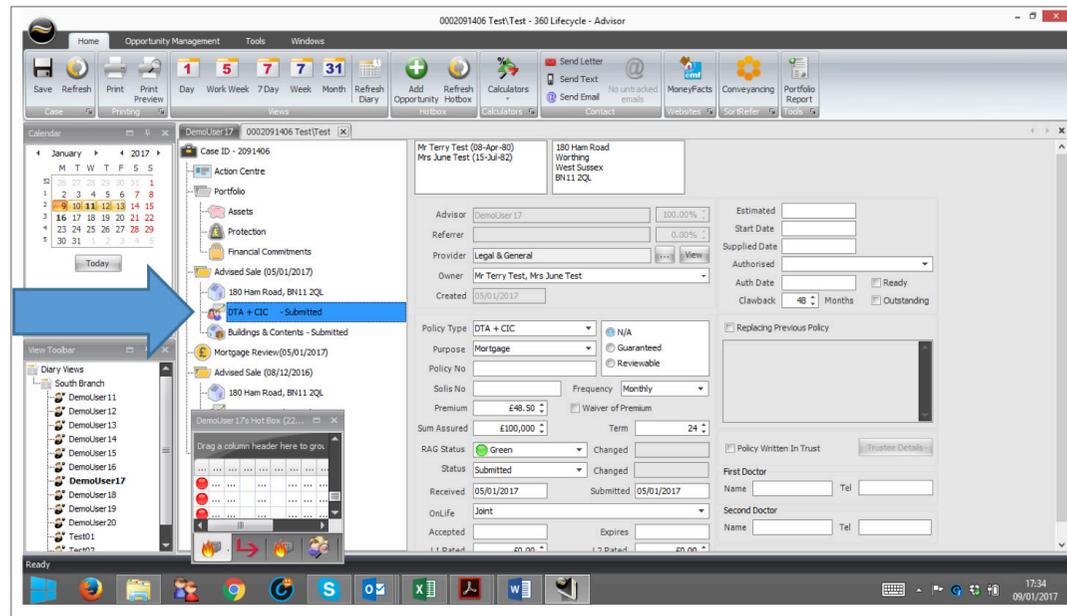
- Offered (Simply click on Offered to add that days date)
- Completed (Simply click on Completed to add that days date)
- Penalties End and/or End Date
- Status (This is automatically mark completed for you) when the completed data field is entered

By entering this simple information you are able to run important Management Reports on your business which take seconds to produce and provide you with invaluable data.



## Life Policies

Life reviews are generated from the 'Authorised Date', plus the Clawback period minus 30 days. Simply click on any protection product within a client account to obtain information on that particular protection product.



Life reviews are generated from the 'Authorised Date', plus the Clawback period minus 30 days.

For example if the Authorised date is the 25.04.16 and the claw back period is 48 months, then the review will be generated 30 days before 25.04.20, therefore will appear in the advisers hotbox as a lead on the 26.03.20.

Similarly a lead will appear on the anniversary date of the authorised date so that the adviser may contact the client for a review.

The 'Authorised Date' in all instances will need to manually keyed and should be the date the policy went on risk.



The screenshot shows a software interface for policy management. At the top, it displays client information: "Mr Terry Test (08-Apr-80)", "Mrs June Test (15-Jul-82)", and "180 Ham Road, Worthing, West Sussex, BN11 2QL". Below this, there are several sections of data entry fields:

- Advisor/Referrer/Provider/Owner/Created:** Includes fields for "DemoUser17", "100.00%", "Legal & General", "Mr Terry Test, Mrs June Test", and "05/01/2017".
- Policy Details:** Includes "Policy Type" (DTA + CIC), "Purpose" (Mortgage), "Policy No" (highlighted with a red arrow), "Solis No", "Premium" (£48.50), "Sum Assured" (£100,000), "Term" (24), "Frequency" (Monthly), and "Waiver of Premium" checkbox.
- Auth Date:** A date field (highlighted with a red arrow) and a "Clawback" field set to 48 months.
- Policy Status:** Includes "RAG Status" (Green), "Status" (Submitted - highlighted with a red arrow), "Received" (05/01/2017), "Submitted" (05/01/2017), and "OnLife" (Joint).
- Other Options:** Includes "Replacing Previous Policy" checkbox, "Policy Written In Trust" checkbox, and "First Doctor" / "Second Doctor" name and telephone fields.

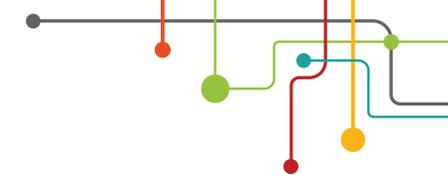
**Key Data:**

It is important that a business is able to keep a record on business and therefore to know which Protection policies have been written and gone on risk is exceptionally important.

Ensure that the data fields highlighted in red are completed on every occasion:

- Auth Date (The date the policy went on risk) - by completing this field when obtaining management reports from HLP CRM 'Office' system the policy is assumed to be completed
- Replacing previous policy (A simple click in the box required)
- Policy Number (Useful in all correspondence generated from within HLP CRM when communicating with clients)
- Status (Important to keep track of the current status of a policy)

By entering this simple information you are able to run important Management Reports on your business which take seconds to produce and provide you with invaluable data.



## Buildings and Contents

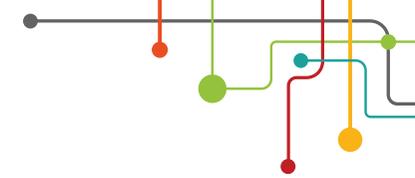
Building and Contents reviews are triggered from the 'Start Date'. A review will be generated 60 days prior to the renewal date.

The screenshot displays the HLP Partnership software interface. The main window is titled '0002091406 Test\Test - 360 Lifecycle - Advisor'. The interface includes a top navigation bar with 'Home', 'Opportunity Management', 'Tools', and 'Windows'. Below this is a toolbar with various icons for actions like 'Save', 'Refresh', 'Print', 'Print Preview', 'Day', 'Work Week', '7 Day', 'Week', 'Month', 'Refresh Diary', 'Add Opportunity', 'Refresh Hotbox', 'Calculators', 'Send Letter', 'Send Text', 'Send Email', 'No untracked emails', 'MoneyFacts', 'Conveyancing', and 'Portfolio Report Tools'. The main content area is divided into several sections:

- Calendar:** Shows a calendar for January 2017 with a 'Today' button.
- Case ID - 2091406:** A sidebar menu with 'Action Centre', 'Portfolio', 'Assets', 'Protection', 'Financial Commitments', 'Advised Sale (05/01/2017)', '180 Ham Road, BN11 2QL', 'DTA + CIC - Submitted', 'Buildings & Contents - Submitted', 'Mortgage Review (05/01/2017)', 'Advised Sale (08/12/2016)', and '180 Ham Road, BN11 2QL'.
- Policy Details:**
  - GI Sale: DemoUser17 (100.00%)
  - Referrer: (0.00%)
  - Provider: Novae
  - Owner: Mr Terry Test, Mrs June Test
  - Created: 05/01/2017
  - Policy Type: Buildings & Contents
  - Buildings: £1,000,000 (Accidental Damage Included)
  - Contents: £60,000 (Accidental Damage Included)
  - Premium: £28.05 (FLP Included)
  - Frequency: Monthly
  - Source: Main Residence
  - Received: Submitted 05/01/2017
  - RAG Status: Green
  - Status: Submitted
  - Estimated: (blank)
- Personal Possessions:** Personal Possessions Cover Included (checked).
- Claim History:** No Claims Discount.
- Construction Details:**
  - Property Type: Mid Terraced House
  - Roof - Construction: Tile
  - Walls - Construction: Brick
  - Bedrooms: n
  - Year Built: 1960

The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying the time as 17:42 on 09/01/2017.

Simply click on any Buildings & Contents product within a client account to obtain information on that particular Buildings & Contents product and the start date of the policy.



The screenshot shows a policy form with the following fields and values:

- GI Sale: DemoUser 17 (100.00%)
- Referrer: (0.00%)
- Provider: Novae
- Owner: Mr Terry Test, Mrs June Test
- Created: 05/01/2017
- Personal Possessions:  Personal Possessions Cover Included
- Policy No: (empty)
- Policy Type: Buildings & Contents
- Buildings: £1,000,000 (Accidental Damage Included)
- Contents: £60,000 (Accidental Damage Included)
- Premium: £28.05 (FLP Included)
- Frequency: Monthly
- Source: Main Residence
- Received: (empty) Submitted: 05/01/2017
- RAG Status: Green
- Status: Submitted
- Accepted: (empty)
- Estimated: (empty)
- Start Date: (empty) End Date: (empty)
- Construction Details:
  - Property Type: Mid Terraced House
  - Roof - Construction: Tile
  - Walls - Construction: Brick
  - Bedrooms: 0 Year Built: 1960

Red arrows point to the Start Date, Status, and Property Type fields.

### Key Data:

It is important that a business is able to keep a record on business and therefore to know which Buildings and Contents policies have been written and gone on risk is exceptionally important.

Ensure that the data fields highlighted in red are completed on every occasion:

- Start Date (The date the policy went on risk) - by completing this field when obtaining management reports from the HLP CRM 'Office' system the policy is assumed to be completed
- Property Type (Must be manually completed for every GI sale)
- Policy Number (Useful in all correspondence generated from within HLP CRM when communicating with clients)
- Status (Important to keep track of the current status of a policy)

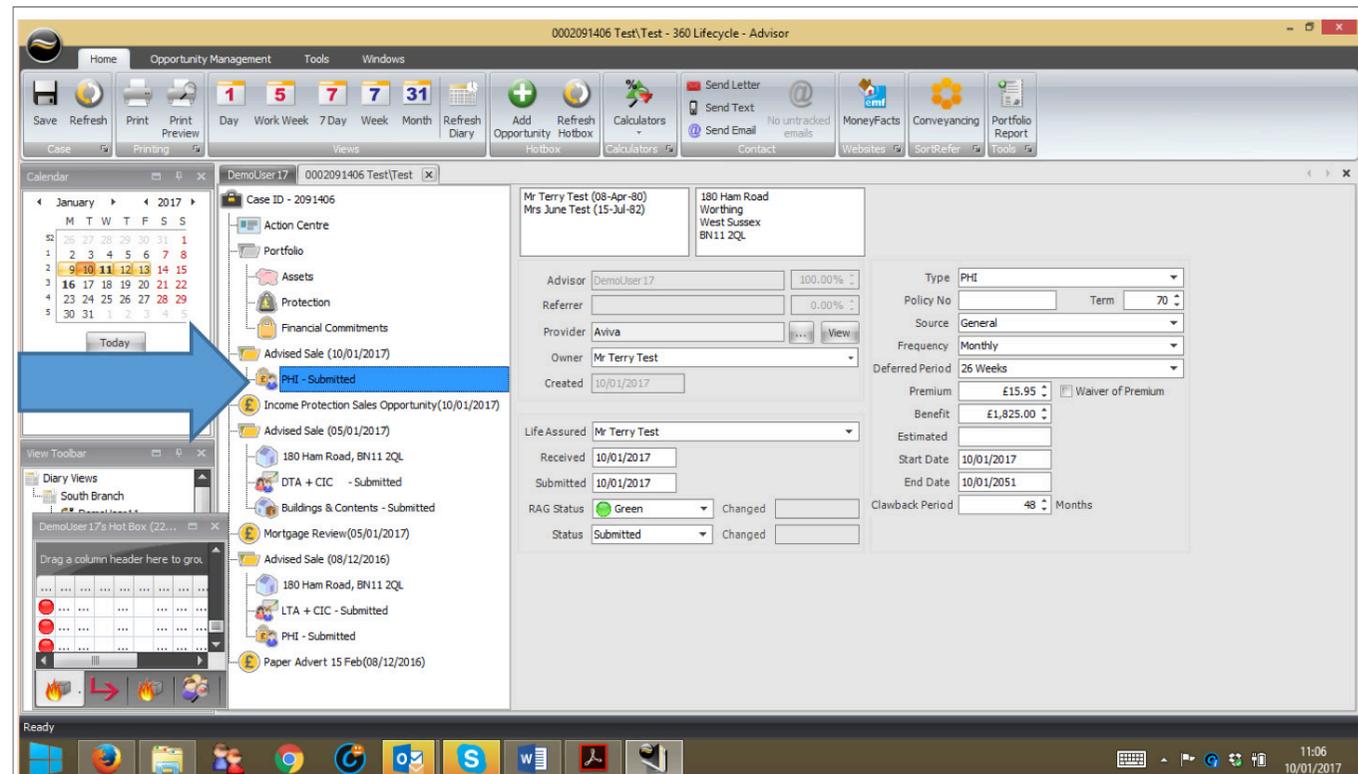
By entering this simple information you are able to run important Management Reports on your business which take seconds to produce and provide you with invaluable data.



## All Other Policies - (Income Protection, Pension, Investment Reviews)

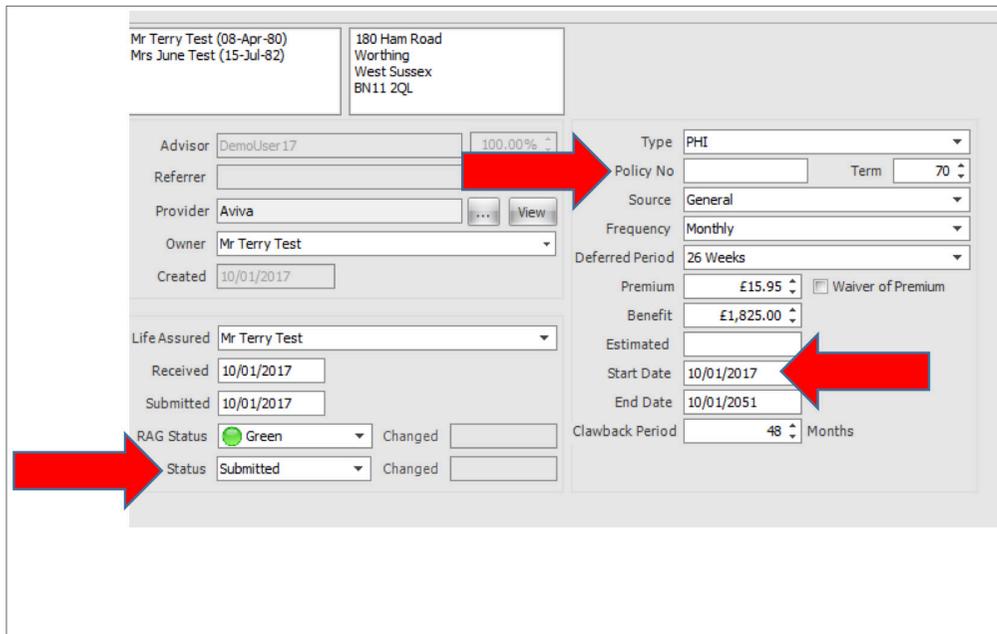
Triggers for Income Protection, Pension and Investment policies work from the 'Start Date'. A review will be generated 11 months after the start date. Clearly HL Partnership partner firms are unable to offer advice on pensions and investments so Income protection is the specific field that can be used.

Simply click on any Income Protection product within a client account to obtain information on that particular income protection product and the start date of the policy.



The screenshot displays the HL Partnership software interface for a client account. The main window title is "0002091406 Test/Test - 360 Lifecycle - Advisor". The interface is divided into several sections:

- Calendar:** Shows the month of January 2017. A blue arrow points from the "PHI - Submitted" entry in the navigation tree to the "PHI - Submitted" field in the main data entry area.
- Navigation Tree:** Lists various actions and events, including "PHI - Submitted" (highlighted in blue), "Income Protection Sales Opportunity(10/01/2017)", "Advised Sale (05/01/2017)", "180 Ham Road, BN11 2QL", "DTA + CIC - Submitted", "Buildings & Contents - Submitted", "Mortgage Review(05/01/2017)", "Advised Sale (08/12/2016)", "180 Ham Road, BN11 2QL", "LTA + CIC - Submitted", "PHI - Submitted", and "Paper Advert 15 Feb(08/12/2016)".
- Main Data Entry Area:** Contains fields for client details (Mr Terry Test, Mrs June Test), address (180 Ham Road, Worthing, West Sussex, BN11 2QL), advisor (DemoUser17), provider (Aviva), owner (Mr Terry Test), and policy details (Type: PHI, Policy No, Term: 70, Source: General, Frequency: Monthly, Deferred Period: 26 Weeks, Premium: £15.95, Benefit: £1,825.00, Start Date: 10/01/2017, End Date: 10/01/2051, Clawback Period: 48 Months).

Mr Terry Test (08-Apr-80)  
Mrs June Test (15-Jul-82)

180 Ham Road  
Worthing  
West Sussex  
BN11 2QL

Advisor: DemoUser17 (100.00%)  
Referrer: [Red Arrow]  
Provider: Aviva  
Owner: Mr Terry Test  
Created: 10/01/2017

Life Assured: Mr Terry Test  
Received: 10/01/2017  
Submitted: 10/01/2017  
RAG Status: Green  
Status: Submitted [Red Arrow]

Type: PHI  
Policy No: [Red Arrow] Term: 70  
Source: General  
Frequency: Monthly  
Deferred Period: 26 Weeks  
Premium: £15.95 [Waiver of Premium]  
Benefit: £1,825.00  
Estimated: [Red Arrow]  
Start Date: 10/01/2017 [Red Arrow]  
End Date: 10/01/2051  
Clawback Period: 48 Months

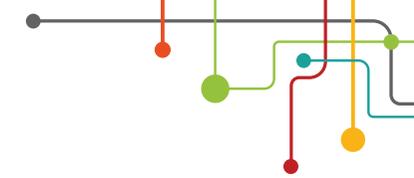
### Key Data:

It is important that a business is able to keep a record on business and therefore to know which Income Protection policies have been written and gone on risk is exceptionally important.

Ensure that the data fields highlighted in red are completed on every occasion:

- Start Date (The date the policy went on risk) - by completing this field when obtaining management reports from the HLP CRM 'Office' system the policy is assumed to be completed
- Policy Number (Useful in all correspondence generated from within HLP CRM when communicating with clients)
- Status (Important to keep track of the current status of a policy)

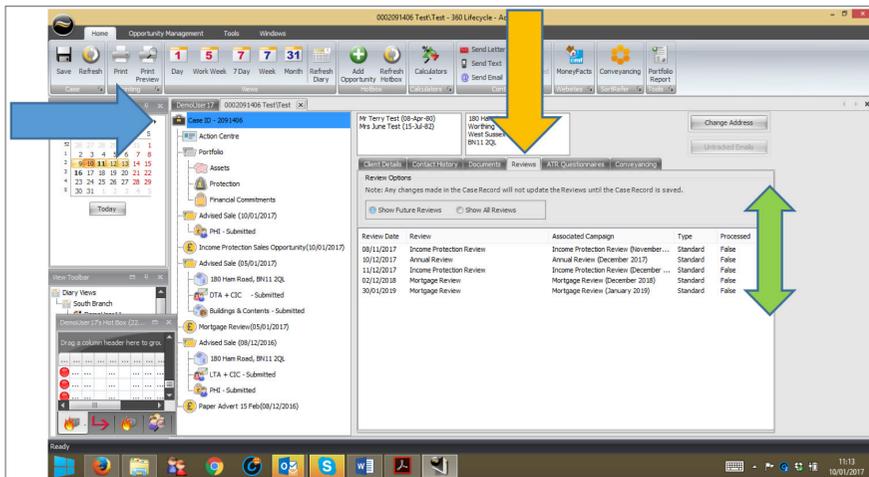
By entering this simple information you are able to run important Management Reports on your business which take seconds to produce and provide you with invaluable data.



## Annual Reviews

An annual review will be generated 11 months after the last completed piece of business based on the start date of that policy. Therefore if a life policy is the last completed bit of business on a client case then the annual review will be generated from the 'Start Date' entered on that policy.

There is also a 'Review' tab on the 'Case ID' level on a case, if you choose to click on this there is also an option to view all of the reviews that the system has registered.



## Servicing arrangements

If a servicing arrangement is set for a policy then this will override any review that the system will generate. This is so you can manipulate the reviews in which will be sent to your hotbox and the level of service that you provide to a client.

The setting and dates for a servicing arrangement can be amended in **Maintenance > General >** select **Servicing Arrangement settings** in the drop down menu in HL Partnership Office. This is normally amended by administrators.

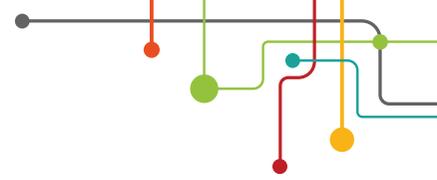
**Here is a reminder of the dates in which will prompt your system to generate a review:**

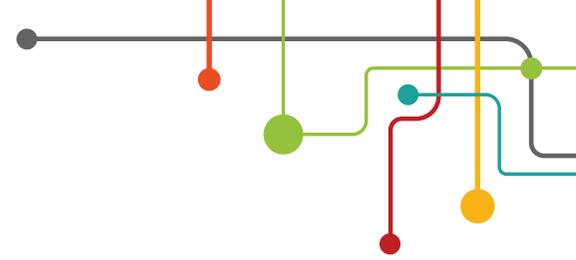
- Mortgage Review – End Date
- Life Policy Review – Authorised Date
- Buildings & Contents Review – Start Date
- Income Protection Review – Start Date



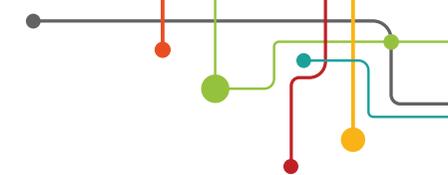
**Annual reviews work based on the last item of business, here is a reminder of how your annual reviews will be generated:**

Last completed bit of business:	Annual Review
Mortgage	If a mortgage is the last completed bit of business then, the annual review will be generated based on the <i>completed date</i> of the mortgage.
Life Policy	If a Life Policy is the last completed bit of business then the annual review will be based on the <i>Authorised date</i> .
Building's and contents	Where a buildings and contents policy is the last completed bit of business the annual review will be generated from the <i>Start Date</i> .
Income Protection	Where an Income Protection policy is the last completed bit of business the annual review will be generated from the <i>Start Date</i> .





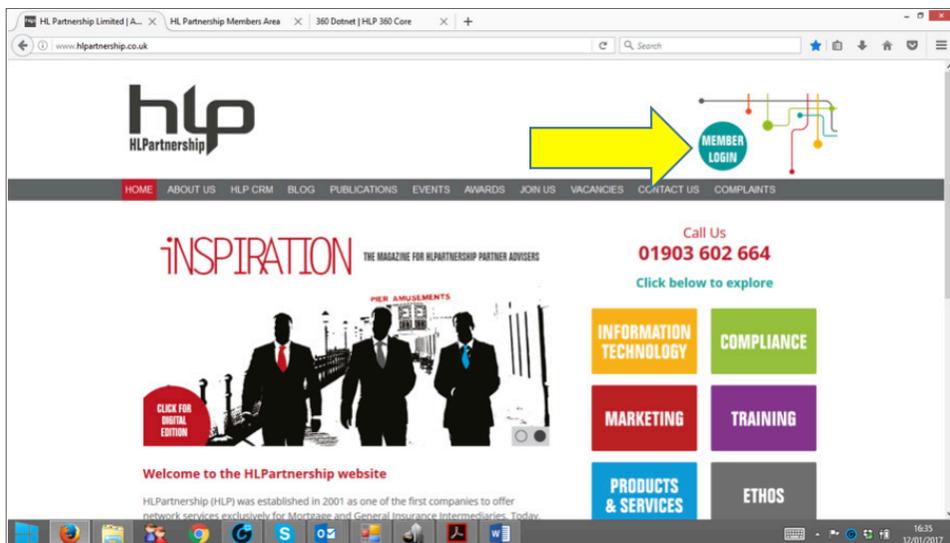
# HLPartnership CRM Training & Support



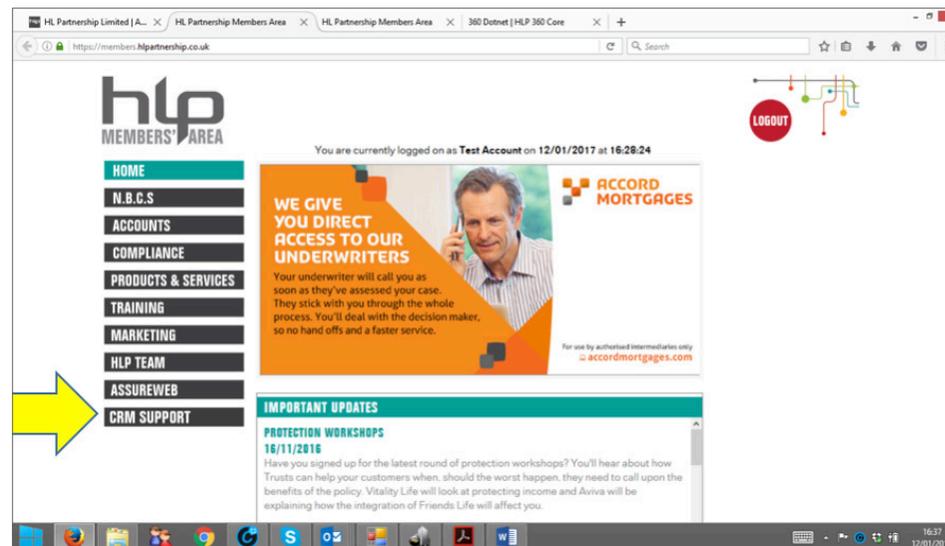
To support our partner firms a series of videos and guides are available for you to access.

Partners simply need to access via the members section of the HLPartnership website by clicking on the member log in button and entering your bespoke user name and password supplied to you.

[www.hlppartnership.co.uk](http://www.hlppartnership.co.uk)

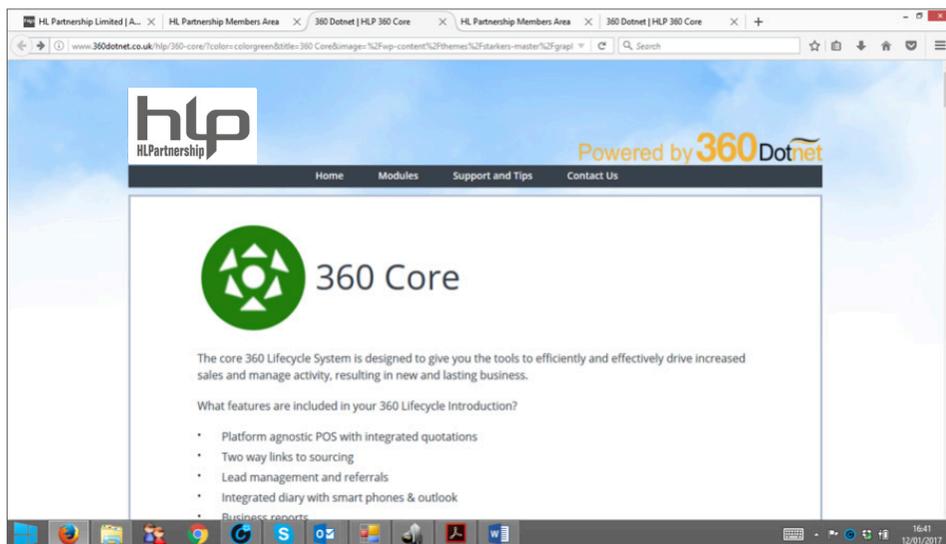


This will take you through to the partners' area:

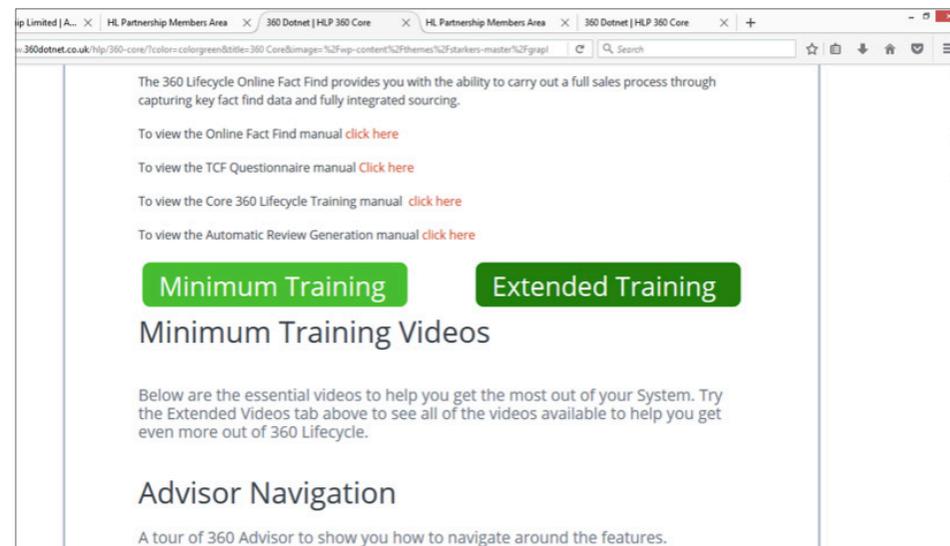


From here click on the CRM support section from the grey ribbons on the left hand side of the screen.

This will open a whole section dedicated to supporting you within HLP CRM.

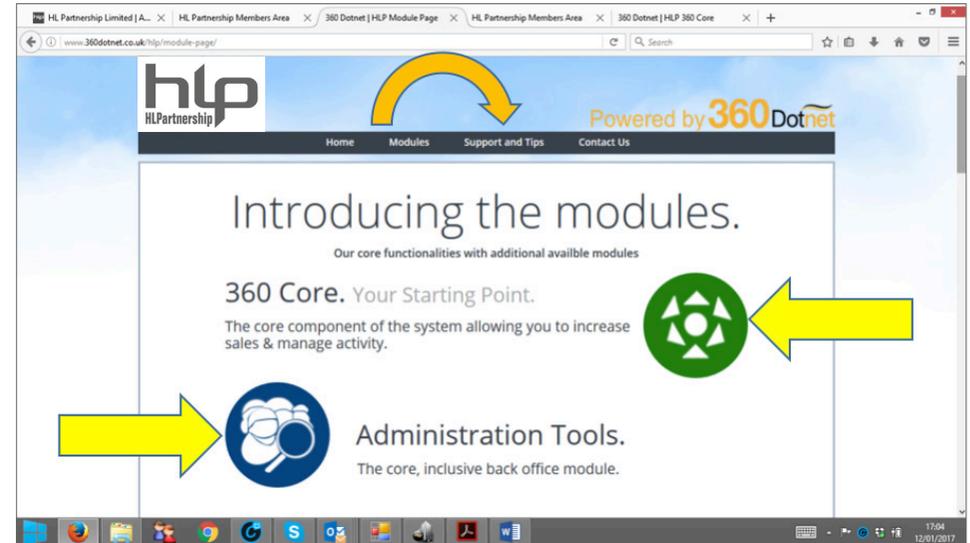


By scrolling down on this 1st page you will find a host of getting started videos and guides. Simply click on these to begin the training:



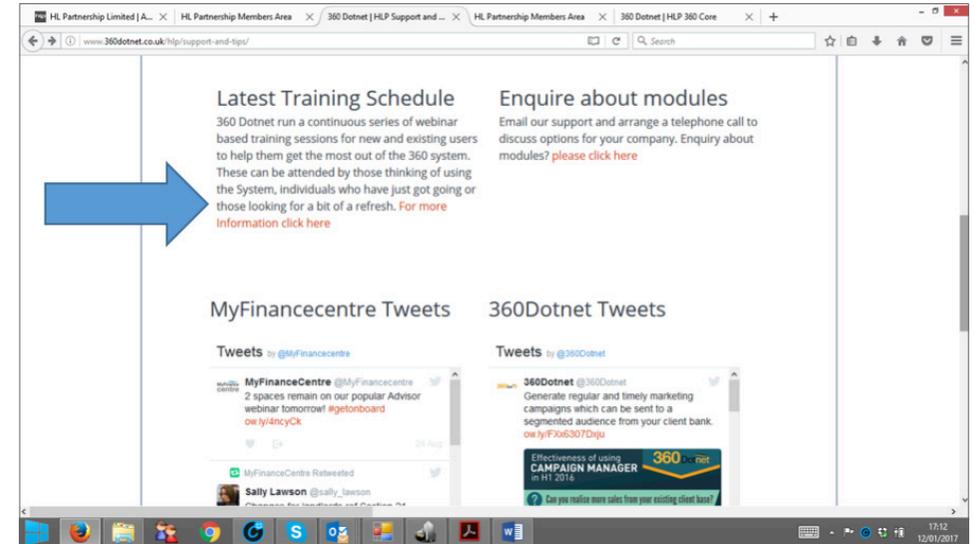
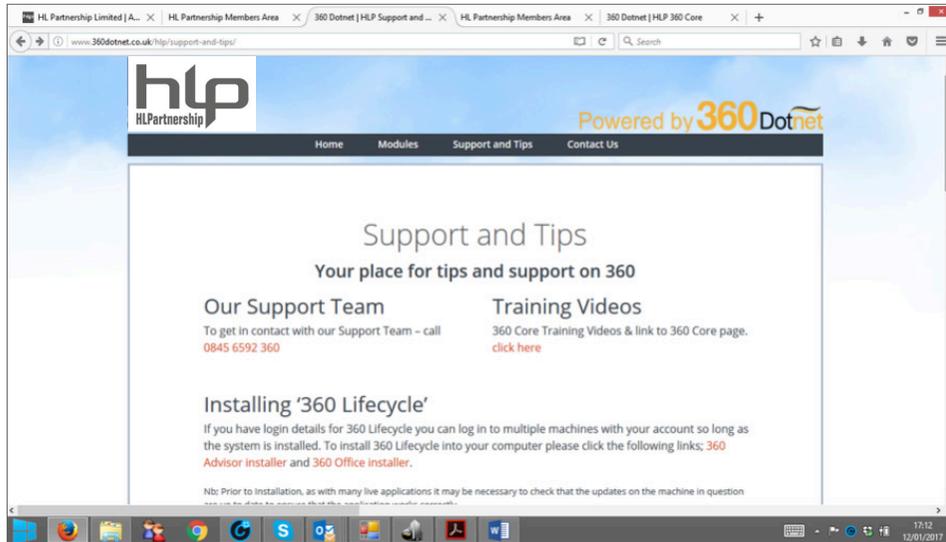


Additional training videos and manual guides can be located within other sections in the modules section of the site and are accessed by double clicking on the module icon:



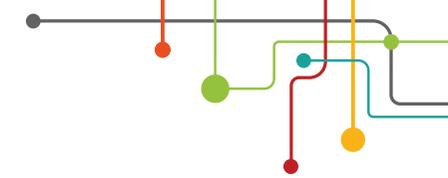
By clicking on the Support and Tips section as highlighted by the orange arrow along the top ribbon you will be able to access to further information and support including the access number to the 360 Lifecycle technical support team on **0845 659 2360**.

Live webinar training across a whole range of topics related to the HLP CRM system and details of these can be located within the Support and Tips page:



By clicking on the hyper link to the latest training schedules, as indicated above, you will find a list of forthcoming webinar training events for the immediate future.

This is regularly updated.



Training Topics covered are:

**360 Advisor  
(Duration approx 60 minutes)**

The 360 Advisor webinar covers the core elements of the 360 Advisor system such as; 360 Diary management & integration, managing your Hotbox & sale opportunities, basic case management & communication tools i.e. 'Send Letter', 'Send Text', 'Send Email'. This webinar is aimed towards advisors getting the most out of the system or as an introduction to all users of the 360 Lifecycle system.

**360 Lifecycle Integrated Fact Find**

The Fact Find webinar covers the core elements of the navigational process, from data capture right through to sourcing requirements and case submission.

**360 Automatic Reviews & Setting Servicing Arrangement  
(Duration approx. 20 minutes)**

This webinar will go through the criteria for how the automatic system generated reviews/opportunities are created e.g. Mortgage, Life & Annual Reviews. The session will also cover how you can create and bespoke your own 'Servicing Arrangement' allocate this to your case records and see the impact of how this affects the client/case review schedule.

**360 Workflow & Sale Event Management  
(Duration approx. 45 minutes)**

This Webinar will cover the functionality available within 360 Office Admin Pipeline, how to Case Merge, Case Delete and overall sale event management e.g. manually adding cases/sales, notes, documents & commission expectations. It is recommended that administrators, sales support or advisers who carry out their own administration and case tracking attend this webinar.

**360 TCF Questionnaire (Duration approx. 15 minutes)**

This Webinar will go through the process of how to send an electronic TCF (customer survey) questionnaire to your clients, record TCF results manually where no client email exists and the TCF reporting tools available.

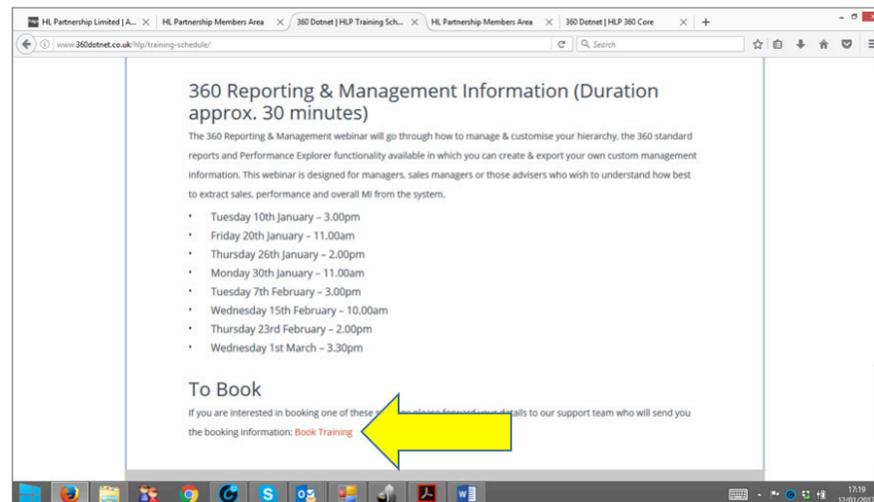
**360 Campaign Manager (Duration approx. 30 minutes)**

The Campaign Manager webinar will go through how to create Email & Letter templates for use in Campaign Manager, the query building process, export your query results or deliver your clients material through Campaign Manager in a fully audited fashion.



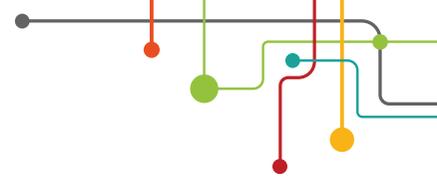
### 360 Reporting & Management Information (Duration approx. 30 minutes)

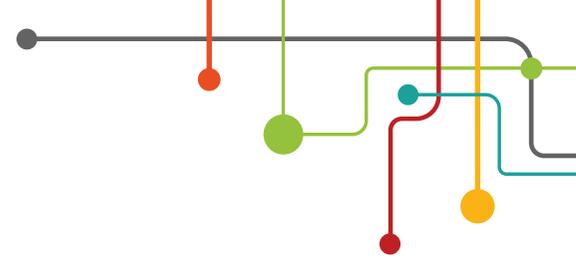
The 360 Reporting & Management webinar will go through how to manage & customise your hierarchy, the 360 standard reports and Performance Explorer functionality available in which you can create & export your own custom management information. This webinar is designed for managers, sales managers or those advisers who wish to understand how best to extract sales, performance and overall MI from the system.



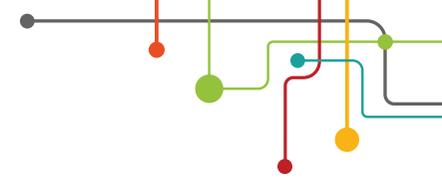
Under each topic a full list of the next webinar training events will be listed and the user simply has to click on the link 'Book training' to secure a place by e-mail on that webinar training event.

Our partner firms have access to a whole raft of training via webinars, videos, guides, 360 Dot Net helpdesk, HLP Partnership staff at the Worthing Head Office and in the field with our Regional Compliance Managers, to support all matters relating to the HLP CRM.





# HLPartnership CRM Reporting Tools



## Reporting Tools

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## 1.0 Introduction

This guide has been created to explain how the reports tool works in your HLP CRM.

The HLP CRM reports give you the control to effectively manage and control your business and its needs. Quickly and easily report on your company's written business, see what is in your pipeline and even query your completed business to your NPW'd.

All reports can be selected by individual or groups of people, introducers and by day, month year or time specified.

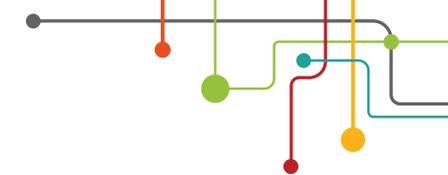
## 2.0 Getting Started

Begin by double clicking on the Office icon which should be located on your desktop.



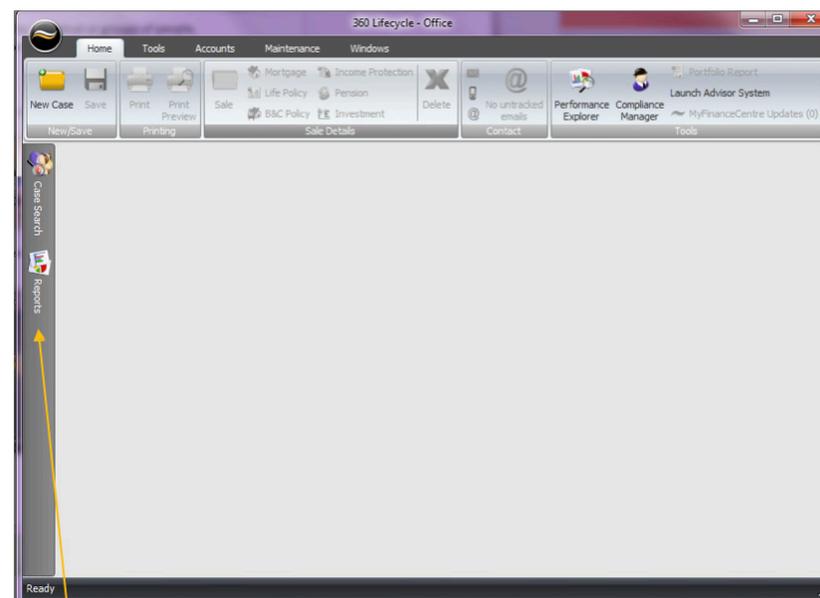
The HLP CRM login screen will open. Enter your credentials and select 'Login'.



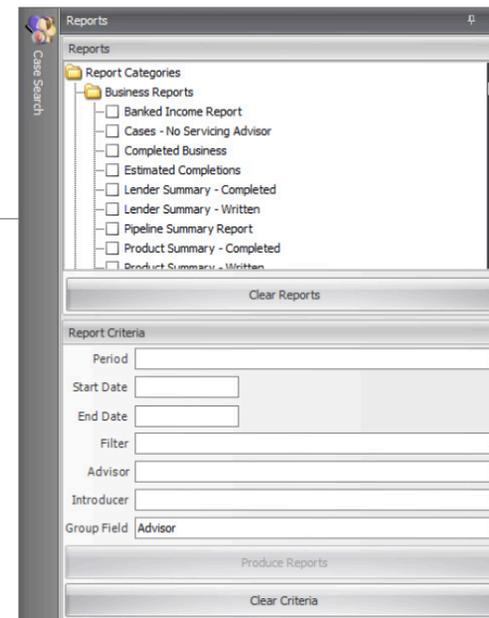


## 2.0 Getting Started

The Office landing page will now open as per here;



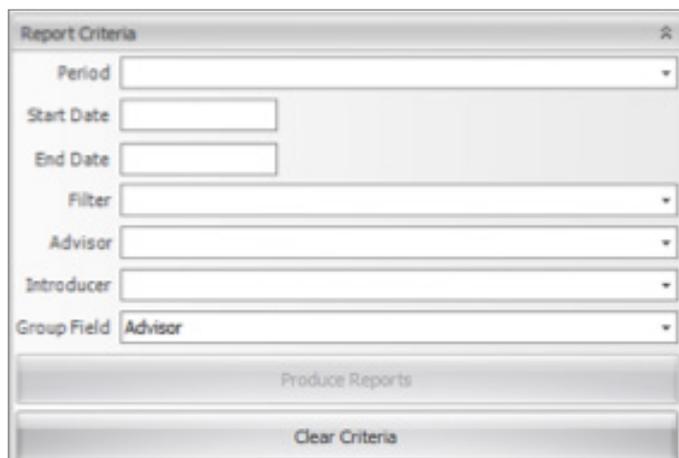
The **'Reports'** tool is located along the left hand side of the Office landing page screen. Click on the icon to view the list of reports available for you to run.





## 3.0 Report Criteria

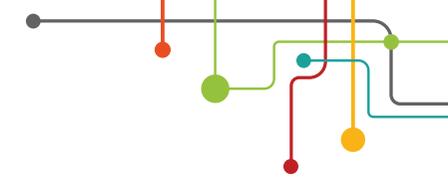
The report criteria of the Reports tool lets you drill down right to the specifics of what it is you are wanting to see. You can add as little or as much to the Report Criteria section as you wish.



The screenshot shows a 'Report Criteria' dialog box with the following fields and buttons:

- Period: [Dropdown menu]
- Start Date: [Text input field]
- End Date: [Text input field]
- Filter: [Dropdown menu]
- Advisor: [Dropdown menu]
- Introducer: [Dropdown menu]
- Group Field: [Dropdown menu, currently set to 'Advisor']
- Produce Reports: [Button]
- Clear Criteria: [Button]

- **Period** – lets you select a pre-defined system period that you want results returned for.
- **Start Date/End Date** – here you can enter your own custom start & end date that you want results returned for.
- **Filter** – This drop down lets you select a specific advisor group to run a report for. These groups are determined from the set-up of your company’s user access group hierarchy.
- **Advisor** – Here you can select a specific advisor in your company to run a report for. This advisor has to be in your company’s user access group hierarchy. You can use this option without having to select an option from the ‘Filter’ drop down menu.
- **Introducer** – If you have introducers set up on your database you can use this drop down menu to return cases and policies specific to that introducer.
- **Group Field** – this drop down lets you choose whether you wish to group the report ran by Advisor, Introducer, Negotiator, Provider or even Event Type.



## 4.0 Running Your Report

Running a report is as simple as ticking the box of the report you wish to run, selecting the report criteria as discussed in section 2.0 and clicking on **'Produce Reports'**.

The screenshot shows a software interface for generating reports. It features a tree view of report categories on the left, a 'Clear Reports' button, and a 'Report Criteria' section with several input fields and dropdown menus. The 'Completed Business' report is selected in the tree view.

Report Category	Selected
Business Reports	
Banked Income Report	<input type="checkbox"/>
Cases - No Servicing Advisor	<input type="checkbox"/>
Completed Business	<input checked="" type="checkbox"/>
Estimated Completions	<input type="checkbox"/>
Lender Summary - Completed	<input type="checkbox"/>
Lender Summary - Written	<input type="checkbox"/>
Pipeline - All Policy Types	<input type="checkbox"/>
Pipeline Summary Report	<input type="checkbox"/>
Product Summary - Completed	<input type="checkbox"/>

**Report Criteria**

Period	Current Month
Start Date	01/08/2014
End Date	31/08/2014
Filter	All Advisors
Advisor	
Introducer	
Group Field	Advisor

Buttons: Clear Reports, Produce Reports, Clear Criteria

The screenshot left gives an example of how you may run a report. Based on the above **'Completed Business'** report being selected the report returned will show:

- All business completed in the current month, for all advisors in the company, grouped by the advisor themselves.

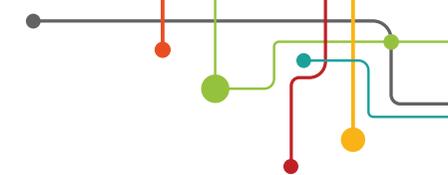
Refer to section 5.0 for specific details on each report.



## 5.0 Report Specifics

### Business Reports:

- 1. Banked Income Report.** The banked income report returns the total amount of commission paid into the system for each advisor, split by commission type. Results here are based on the 'received' date of a banking receipt matching the period you are running the report for.  
*NB: This report requires a company to actively be using the Accounts tool.*
- 2. Cases No Servicing Advisor.** This report returns all cases in the system which do not have a servicing advisor saved to it. The report will list the last advisor who created an opportunity or sale event (if there is one) to the case record as an indication to you who may be the Servicing Advisor.  
*NB: This report cannot be filtered by period.*
- 3. Completed Business.** Completed business reports return all policies where the completed date is within the period selected in the report criteria. The completed date for each policy is based on the following:
  - Mortgages - Completed date is based on the Completion Date of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the Exchanged Date of the policy.
  - Life policies - Completed date is based on the Authorisation Date of the life policy.
  - B&C/Income Protection/Pensions/Investments - Completed date is based on the Start Date of each policy.
- 4. Estimated Completions.** This report will return all policies where the estimated completion, as entered into the 'Estimated Completion' section of a sale event, is within the period selected in the report criteria.
- 5. Lender Summary - Completed.** This report will return a mortgage lender summary for all mortgages where the 'Completion Date' is within the same period selected in the report criteria.
- 6. Lender Summary - Written.** This report will return a mortgage lender summary for all mortgages where the 'Created Date' is within the same period selected in the report criteria.  
*NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on HLP CRM.*
- 7. Pipeline - All Policy Types.** - Shows a complete list of all policies that have the same status as one selected in 'Pipeline Report Settings'. Please contact the 360 DotNet support to discuss your pipeline settings if required.



## 5.0 Report Specifics

### Business Reports:

**8. Pipeline Summary Report.** This report returns all policies that have the same status as one selected in 'Pipeline Report Settings', found in the maintenance section of HLP CRM Office.

***NB:** Pipeline Report Settings are a management tool and not all users may have access to this section of the system. The report also cannot be queried based on a period.*

**9. Product Summary – Completed.** This report shows a product summary of all policies which have been completed within the same period selected in the report criteria. The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

**10. Product Summary – Written.** This report will return a product summary for all policies where the '**Created Date**' is within the same period selected in the report criteria.

***NB:** The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on HLP CRM.*

**11. Product Summary By Provider – Completed.** This report shows a product summary by provider of all policies which have been completed within the same period selected in the report criteria. The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

**12. Product Summary By Provider – Written.** This report shows a product summary by provider of all policies which have been created in the same period selected in the report criteria.

***NB:** The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on HLP CRM.*

**13. Written Business.** – Shows a complete list of all policies created within the same period selected in the report criteria.

***NB:** The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on HLP CRM.*



## 5.0 Report Specifics

### League Table Reports:

**1. Banked Income League** - The banked income league report returns the total amount of commission paid into the system for each advisor, split by commission type. Results here are based on the 'received' date of a banking receipt matching the period you are running the report for. This reports differs from the Banked Income Report in that it also shows advisor splits.

***NB:** This report requires a company to actively be using the Accounts tool.*

**2. Banked Income League - Filtered** - The banked income league report returns the total amount of commission paid into the system for each advisor, split by commission type. Results here are based on the 'received' date of a banking receipt matching the period you are running the report for. Unlike the banked income league report you can filter this report for different advisors and groups.

This reports differs from the Banked Income Report in that it also shows advisor splits.

***NB:** This report requires a company to actively be using the Accounts tool.*

**3. Completed Business League** - Completed business reports return all policies where the completed date is within the period selected in the report criteria. This reports differs from the Completed Business report in that it also shows advisor splits.

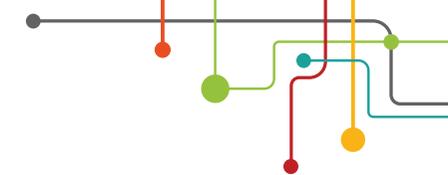
The completed date for each policy is based on the following:

- Mortgages - Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies - Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments - Completed date is based on the **Start Date** of each policy.

**4. Completed Business League - Filtered** - Completed business reports return all policies where the completed date is within the period selected in the report criteria. This reports differs from the Completed Business report in that it also shows advisor splits. Unlike the completed business league report you can filter this report for different advisors and groups.

The completed date for each policy is based on the following:

- Mortgages - Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the Exchanged Date of the policy.
- Life policies - Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments - Completed date is based on the **Start Date** of each policy.



## 5.0 Report Specifics

### League Table Reports:

**5. Written Business League** – Shows a complete list of all policies created within the same period selected in the report criteria and includes advisor splits.

***NB:** The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on HLP CRM.*

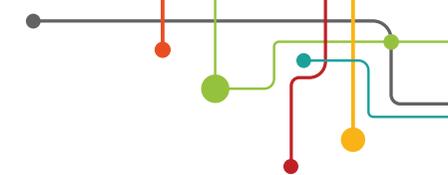
**6. Written Business League - Filtered** – Shows a complete list of all policies created within the same period selected in the report criteria and includes advisor splits. Unlike the written business report you can filter this report for different advisors and groups.

***NB:** The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on HLP CRM.*



## 6.0 Commission Reports

- 1. Pipeline Commission** – Shows all cases where the commission expectation has not been satisfied.
- 2. Admin Fees Collected** – Shows all admin fees for a mortgage where the fee has not been waived and money has been banked within the report filter criteria.  
*NB: This report requires a company to actively be using the Accounts tool.*
- 3. Admin Fees Completed** – Shows all banked admin fees where a mortgage's completion date is within the report criteria.  
*NB: This report requires a company to actively be using the Accounts tool.*
- 4. Admin Fees Written** – Shows all admin fees where a mortgage created date is within the report criteria.
- 5. Aged GI Commission** – Shows all general insurance policies in the system that have unsatisfied commission.
- 6. Aged Life Commission** – Shows all life policies in the system that have unsatisfied commission.
- 7. Aged Procs** – Shows all mortgage policies that have unsatisfied commissions.
- 8. Banking Details** – Shows all payments that have been banked into the system within the report criteria you are searching for.
- 9. Banking Details With Splits** – Shows all payments, including advisor splits that have been banked into the system within the report criteria you are searching for.
- 10. Banking Receipt List** – Shows all banking's where the Banking Receipt received date is between the report criteria being searched for.
- 11. Incorrect Proc Fees** – Shows all mortgages with an unsatisfied Proc fee where the amount banked does not match the Proc fee expectation. Mortgages have to have a completion date to appear in this report.
- 12. Mortgages Written – No Proc Fee** – Shows all mortgages where the created date of that mortgage is within the report criteria you are searching for, that do not have a Proc fee expectation saved to them.
- 13. Outstanding Admin Fees** – Shows all mortgages which have either a completed or exchanged date (within the report criteria you are searching for) that does not have satisfied admin fees. Commissions can be manually satisfied to remove them from this list.



## 6.0 Commission Reports

**14. Outstanding Commission** – Shows all policies where a commission expectation has not been satisfied and the policy completed date is within the report search criteria. For policies to appear in this list the following dates must be entered

- Mortgages – must have completion date entered
- Life – must have authorised date entered
- Income Protection/B&C/Investment/Pension – must have a start date entered Commissions can be manually satisfied to remove them from this list.

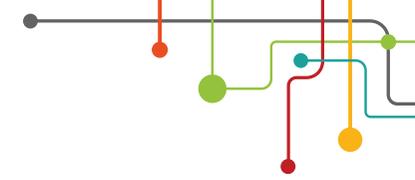
**15. Outstanding GI Commission** – Shows all GI policies where the commission expectation has not been satisfied and the GI policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria. Commissions can be manually satisfied to remove them from this list.

**16. Outstanding Income Protection Commission** – Shows all income protection policies where the commission expectation has not been satisfied and the income protection policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria. Commissions can be manually satisfied to remove them from this list.

**17. Outstanding Investment Commission** – Shows all Investment policies where the commission expectation has not been satisfied and the investment policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria. Commissions can be manually satisfied to remove them from this list.

**18. Outstanding Life Commission** – Shows all life policies where the commission expectation has not been satisfied and the life policy is completed. This completed date is based on the policy 'Auth Date' and must be within the same time period being searched for in the report criteria. Commissions can be manually satisfied to remove them from this list.

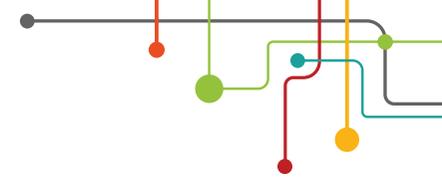
**19. Outstanding Pension Commission** – Shows all pension policies where the commission expectation has not been satisfied and the pension policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria. Commissions can be manually satisfied to remove them from this list.



## 6.0 Commission Reports

**20. Outstanding Procs (Completed)** - Shows all mortgages with a completion date between the dates you are running the report for where the proc commission expectation has not been satisfied.  
Commissions can be manually satisfied to remove them from this list.

**21. Outstanding Procs (Exchanged)** - Shows all mortgages with an exchanged date between the dates you are running the report for where the proc commission expectation has not been satisfied.  
Commissions can be manually satisfied to remove them from this list.



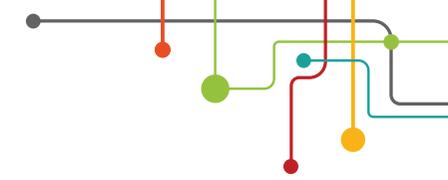
## 7.0 Mortgage Reports

- 1. Mortgage Pipeline** – Shows all mortgages with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 2. Mortgage Completed** – Shows all mortgages with a completed date within the report criteria you are searching for.
- 3. Mortgage Exchanged** – Shows all mortgages with an exchanged date within the report criteria you are searching for.
- 4. Mortgages Written** – Shows all mortgages that have been created within the report criteria you are searching for. This report could return mortgages that have also been completed.
- 5. Mortgages Written – Not Completed** – Shows all mortgages that have been created within the report criteria you are searching for but do not have a completion date entered.
- 6. Mortgages Written – Not Offered** – Shows all mortgages that have been created within the report criteria you are searching for but do not have an offered date entered.
- 7. Mortgages Written – No GI** – Shows all mortgages that have been created within the report criteria you are searching for but do not have a GI policy within the same sale event.
- 8. Mortgages Written – No Life** – Shows all mortgages that have been created within the report criteria you are searching for but do not have a Life policy within the same sale event.
- 9. Remortgage Campaign** – Shows all mortgages where either the penalty end date or mortgage end date is in the same time frame being searched for in the report criteria.



## 8.0 Life Reports

- 1. Income Protection Completed** – Shows all income protection policies with a start date within the report criteria you are searching for.
- 2. Income Protection NPW's** – Shows all income protection policies with a status of NPW'd where the status changed date is within the report criteria you are searching for.
- 3. Income Protection Pipeline** – Shows all income protection policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 4. Income Protection Written** – Shows all income protection policies that have been created in the same time period as you are running the report for. This report could also return completed income protection policies if they have been completed in the same time period.
- 5. Life Completed** – Shows all life policies with an Authorised date within the date criteria you are running the report on.
- 6. Life Outstanding** – Shows all life policies with an Authorised date within the date criteria you are running the report on.
- 7. Life Pipeline** – Shows all life policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 8. Life Ready** - Shows all life policies with 'Ready' ticked on the policy record.
- 9. Life Written** - Shows all life policies that have been created in the same time period as you are running the report for. This report could also return completed life policies if they have been completed in the same time period.
- 10. Replacement Life (Completed)** – Shows all life policies where 'Replacing Previous Policy' is selected on the policy record and a life authorised date has been entered. Cases returned will be where the life auth date is within the date criteria you are running the report for.
- 11. Replacement Life (Written)** – Shows all life policies where 'Replacing Previous Policy' is selected on the policy record and the created date of the policy is within the date criteria you are running the report for.



## 9.0 GI Reports

1. **GI Completed** – Shows all GI policies with a start date within the report criteria you are searching for.
2. **GI Pipeline** – Shows all GI policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
3. **GI Written** - Shows all GI policies that have been created in the same time period as you are running the report for. This report could also return completed GI policies if they have been completed in the same time period.

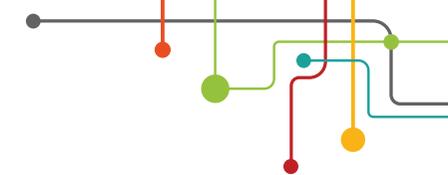
## 10.0 IFA Reports

1. **Investment Pipeline** – Shows all Investment policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
2. **Investments Completed** – Shows all Investment policies with a start date within the report criteria you are searching for.
3. **Investments Written** – Shows all Investment policies that have been created in the same time period as you are running the report for. This report could also return completed Investment policies if they have been completed in the same time period.
4. **Pension Pipeline** – Shows all Pension policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
5. **Pensions Completed** – Shows all Pension policies with a start date within the report criteria you are searching for.
6. **Pensions Written** – Shows all Pension policies that have been created in the same time period as you are running the report for. This report could also return completed Pension policies if they have been completed in the same time period.



## 11.0 Referral Reports

- 1. B&C Referrals - Completed** – Shows all GI policies which have a referring advisor and a start date within the report criteria you are searching for.
- 2. B&C Referrals - Written** – Shows all GI policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed GI policies if they have been completed in the same time period.
- 3. Income Protection Referrals - Completed** – Shows all Income Protection policies which have a referring advisor and a start date within the report criteria you are searching for.
- 4. Income Protection Referrals - Written** – Shows all Income Protection policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Income Protection policies if they have been completed in the same time period.
- 5. Investment Referrals - Completed** – Shows all Investment policies which have a referring advisor and a start date within the report criteria you are searching for.
- 6. Investment Referrals - Written** – Shows all Investment policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Investment policies if they have been completed in the same time period.
- 7. Life Referrals - Completed** – Shows all Life policies which have a referring advisor and an authorisation date within the report criteria you are searching for.
- 8. Life Referrals - Written** – Shows all Life policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Life policies if they have been completed in the same time period.
- 9. Mortgage Referrals - Completed** – Shows all Mortgage policies which have a referring advisor and either a completion date or exchanged date within the report criteria you are searching for.
- 10. Mortgage Referrals - Written** – Shows all Mortgage policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Mortgage policies if they have been completed in the same time period.
- 11. Pension Referrals - Completed** – Shows all Pension policies which have a referring advisor and a start date within the report criteria you are searching for.
- 12. Pension Referrals - Written** – Shows all Pension policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Pension policies if they have been completed in the same time period.



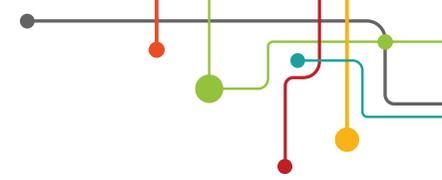
## 12.0 Compliance Reports

- 1. Duplicate Clients** – Shows all cases where clients have the same forename, surname, postcode and date of birth.
- 2. Fast Track Mortgages** – Shows all mortgage policies where ‘Fast Track’ is selected on the mortgage record and the created date of the policy is within the same time period you are running the report for.
- 3. Interest Only Mortgages** – Shows all mortgage policies where the repayment method is ‘Interest Only’ and the created date of the policy is within the same time period you are running the report for.
- 4. Mortgages Going Into Retirement** – Shows all mortgages where the owner is going into retirement. An assumptive retirement age of 65 has been made for the purpose of this report.
- 5. Mortgages With Term > 25 Years** – Shows all mortgages with a term greater than 25 years where the created date of the policy is within the same time period you are running the report for.
- 6. NPW Buildings & Contents** – Shows all GI policies where the policy status is NPW and the status changed date is within the same criteria you are running the report for.
- 7. NPW Life** – Shows all Life policies where the policy status is NPW and the status changed date is within the same criteria you are running the report for.
- 8. NPW Mortgages** – Shows all Mortgage policies where the policy status is NPW and the status changed date is within the same criteria you are running the report for.
- 9. Self Cert Mortgages** – Brings up all mortgages where the ‘Self Cert’ tick box is selected on the mortgage record and the policy was created within the same time period you are running the report for.
- 10. Time To Offer (Administrator)** – Calculates the time it takes a mortgage policy offer to come through once the application has been submitted to the lender. The submitted date is based on the ‘To Lender’ date on the mortgage record and the mortgage offer date is based on the ‘Mortgage Offer’ date on the mortgage record. This report is based on the administrator of the sale which is taken from the ‘Case Owner’ on the sale event details.
- 11. Time To Offer (Advisor)** – Calculates the time it takes a mortgage policy offer to come through once the application has been submitted to the lender. The submitted date is based on the ‘To Lender’ date on the mortgage record and the mortgage offer date is based on the ‘Mortgage Offer’ date on the mortgage record. This report is based on the advisor of the sale.
- 12. Time To Offer (Lender)** – Calculates the time it takes a mortgage policy offer to come through once the application has been submitted to the lender. The submitted date is based on the ‘To Lender’ date on the mortgage record and the mortgage offer date is based on the ‘Mortgage Offer’ date on the mortgage record. This report is based on the lender of the mortgage policy.



## 13.0 Activity Reports

- 1. Appointments Booked** – Shows all appointments which have been created within the same time period you are running the report for.
- 2. Appointments Seen** – Shows all appointments, which have not been DTU'd or cancelled, where the appointment date is within the same time period you are running the report for.
- 3. First Appointments Booked** – Shows all first appointments of a sale opportunity where the created date is within the same time period you are running the report for.
- 4. First Appointments Seen** – Shows all first appointments of a sale opportunity where the appointment date is within the same time period you are running the report for.
- 5. Negotiator Appointments Booked** – Shows all appointments booked by a negotiator where the created date is within the same time period you are running the report for.
- 6. Negotiator Appointments Seen** – Shows all appointments booked by a negotiator where the appointment date is within the same time period you are running the report for.
- 7. Negotiator First Appointments Booked** – Shows all first appointments of a sale opportunity which have been booked by a negotiator and the created date is within the same time period you are running the report for.
- 8. Negotiator First Appointments Seen** – Shows all first appointments of a sale opportunity which have been booked by a negotiator and the appointment date is within the same time period you are running the report for.

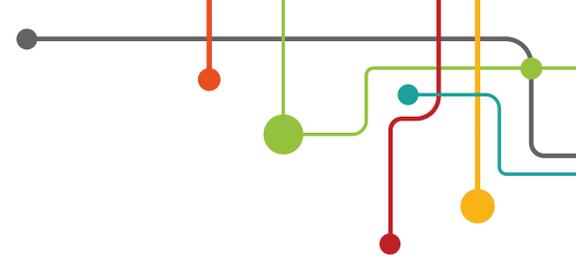


## 14.0 Negotiator Reports

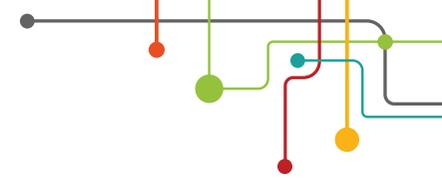
1. **Mortgages Completed** – Shows all mortgages which have a negotiator saved to the sale event details as well as either a mortgage completion date or mortgage exchanged date within the same time period you are running the report for.
2. **Mortgages Written** – Shows all mortgages which have a negotiator saved to the sale event details where the mortgage created date is within the same time period you are running the report for.

## 15.0 Client Contact Reports

1. **Missing Email Addresses** – Shows all clients without an email address on a case record.
2. **Questionnaires Outstanding** – Shows all outstanding TCF questionnaires where the questionnaire sent date is within the same time period you are running the report for.
3. **Questionnaires Received** – Shows all TCF questionnaires which have been received within the same time period you are running the report for.
4. **Questionnaires Sent** – Shows all TCF questionnaires where the sent date is within the same time period you are running the report for.
5. **SMS Messages Sent** – Shows all SMS sent from the system along with a status of whether they were sent successfully or not.



# HLPartnership CRM Performance Explorer



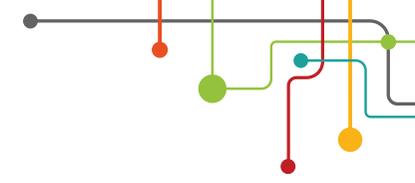
**Performance Explorer enables you to review company performance in real time allowing you to see results and improve productivity pro-actively at the root of an issue.**

**You will be able to analyse historical sales and KPI data, spot trends, identify training gaps and needs as well as gather data for RMAR.**

**This can be selected by adviser, employed or self-employed, combined as team, as an office, region or the whole group. Temporary teams can be set up which may be useful for creating a group of advisers that may need further training and attention.**

**This tool is essential for business planning and not just for the management team. Advisers can access their own Performance and monitor it by going into 'Compliance Manager'. This is vital for the adviser. Giving them permission to see their own performance track, allows them the transparency to see their own activity around KPI's and income.**

**They can see what has been written, completed and banked. Advisers will be able to see what has been paid and what has not, giving them more ownership and responsibility.**

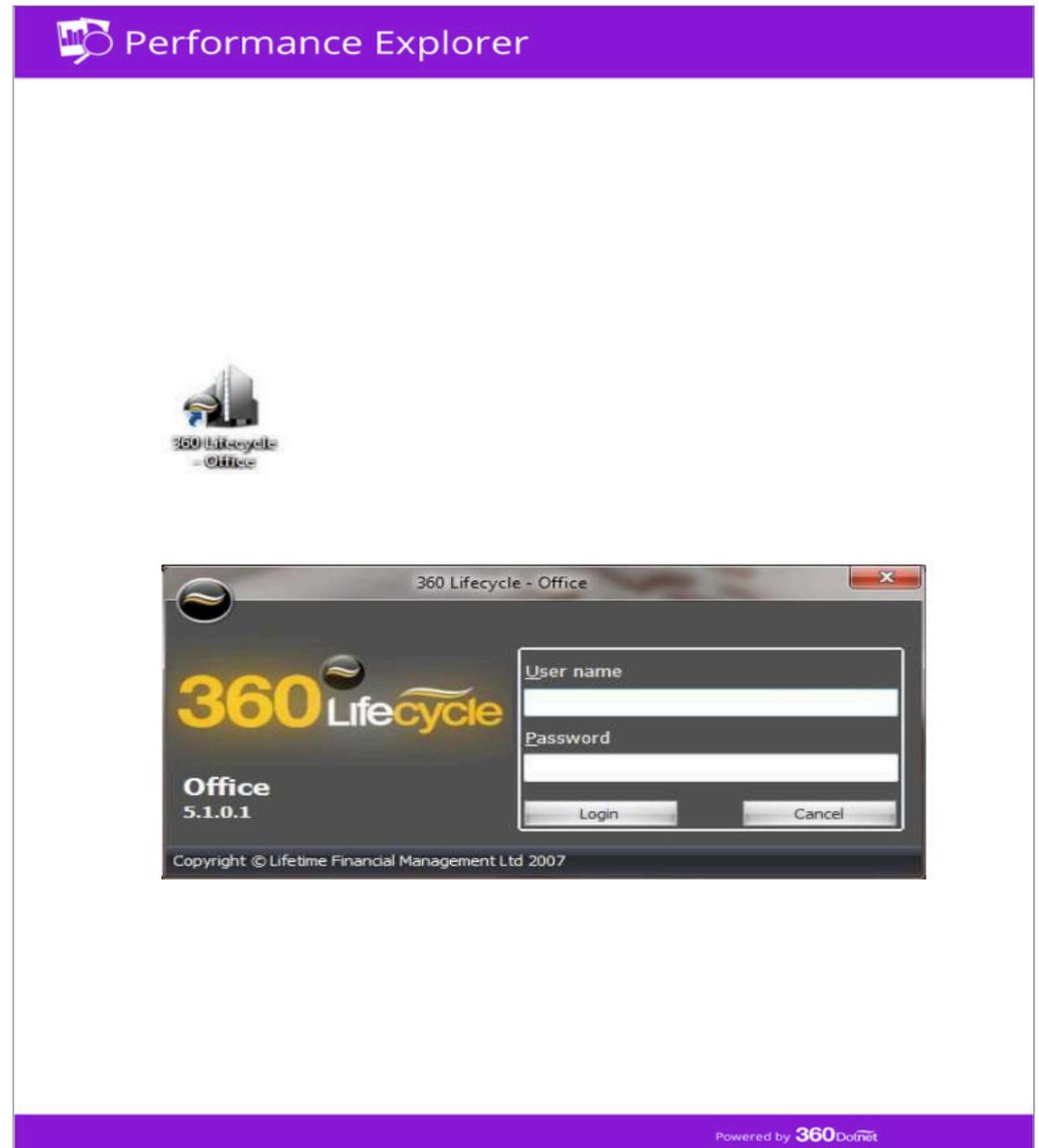


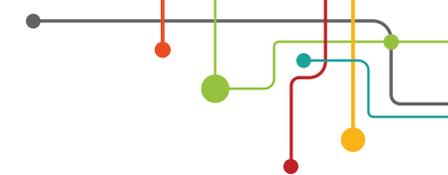
## Getting started

Begin by double clicking on the Office Icon which should be located on the front screen of your PC.

Your login page should now open, similar to this.

You will now be able to enter the username and password supplied to you. The office landing page will now open up as per below;





## Getting started

'Performance explorer' can be found in 'Office' tab under the 'tools' as per below.

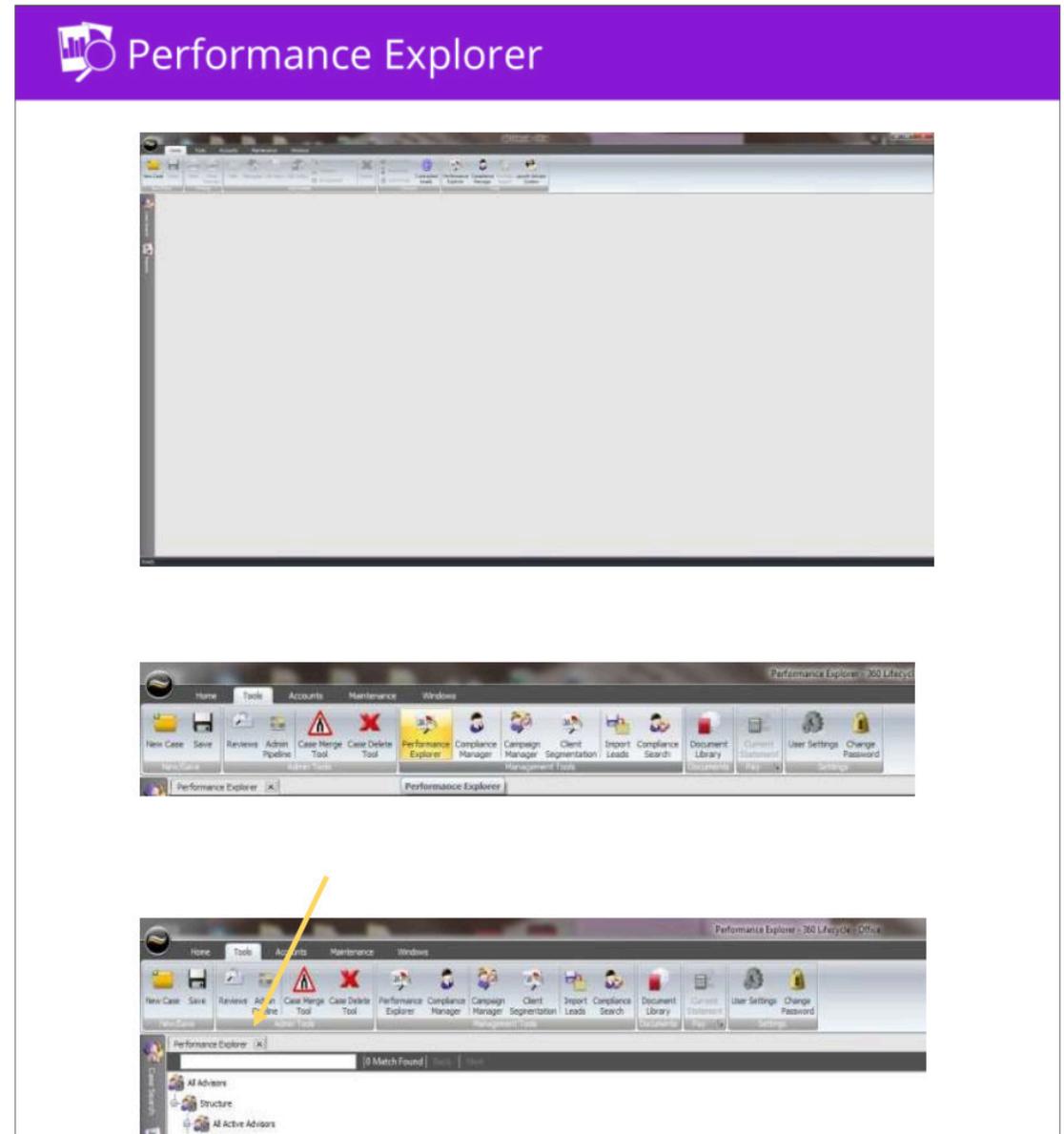
### 'To begin'

By clicking on Performance explorer'

You will be presented with a list of advisers.

You can either select 'all advisers' or individuals by name.

To do this, you should right click on the adviser in question, where you will see a list of options as per below.





## Getting started

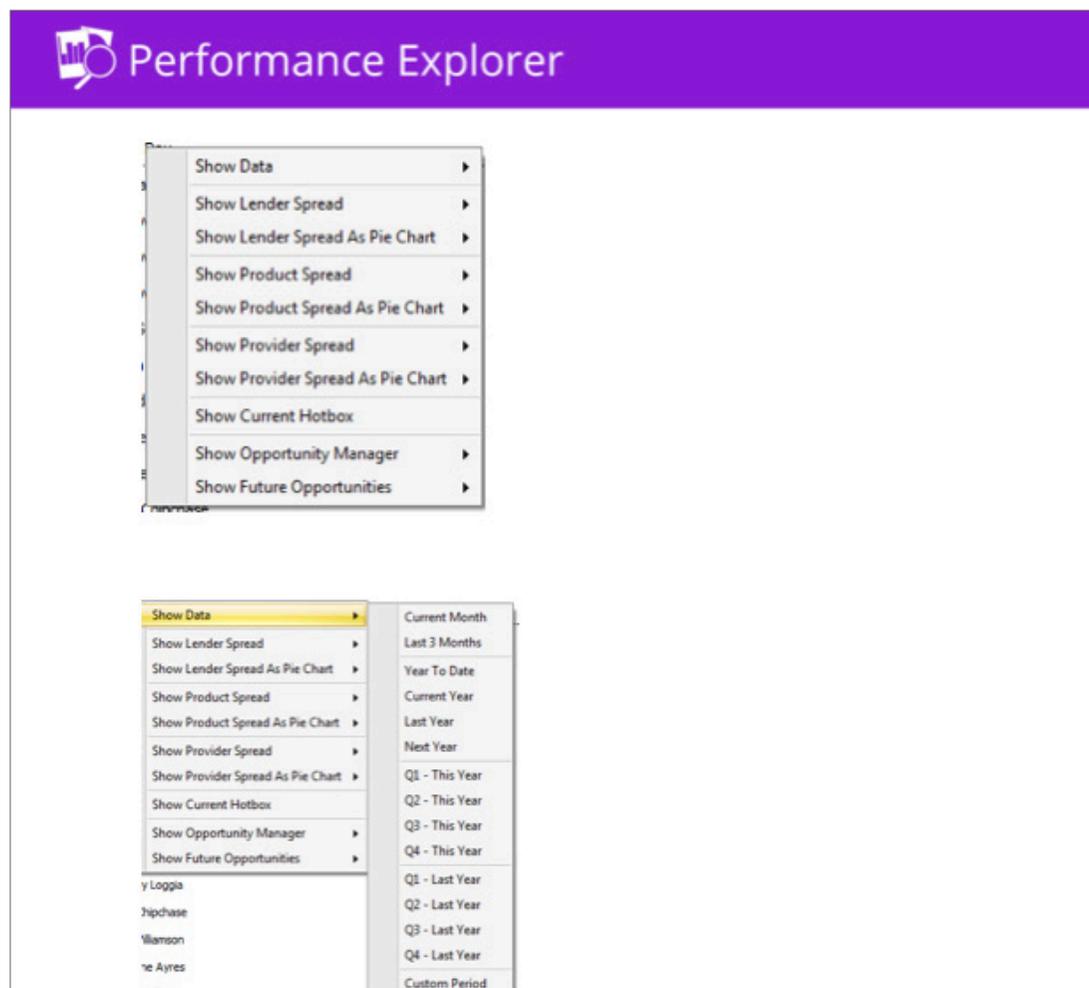
By hovering your cursor over the options. On each option you will see a second menu offering time periods.

The different options will allow you to review company performance from different angles. The first option you will see is;

### ‘Show Data’

When clicking any option you will be asked to select the required time frame, as you can see in the above options. This then gives you the results of the sales and KPI performance.

If for example you click year to date, you will see a table similar to the one below

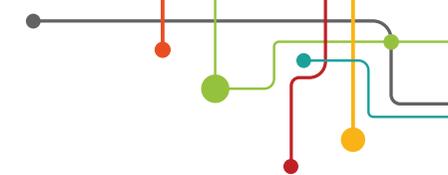


**Performance Explorer**

- Show Data
- Show Lender Spread
- Show Lender Spread As Pie Chart
- Show Product Spread
- Show Product Spread As Pie Chart
- Show Provider Spread
- Show Provider Spread As Pie Chart
- Show Current Hotbox
- Show Opportunity Manager
- Show Future Opportunities

**Show Data** sub-menu:

- Current Month
- Last 3 Months
- Year To Date
- Current Year
- Last Year
- Next Year
- Q1 - This Year
- Q2 - This Year
- Q3 - This Year
- Q4 - This Year
- Q1 - Last Year
- Q2 - Last Year
- Q3 - Last Year
- Q4 - Last Year
- Custom Period



## Getting started

In the first section you will see written, completed targets by policy type, this includes fees. Data can be viewed over any area of the business, over any period of time. KPI's can be compared year on year and new KPI's can be viewed at any time.

If now you select 'Home' from the top bar and 'Print Preview' you will be able to print out a copy to file away if you wish to do so.

This is how you will see your printed version.

**Performance Explorer**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
<b>Written Targets</b>											
Target Mortgages Written	0	0	0	0	0	0	0	0	0	0	0
Target Fees Written	0	0	0	0	0	0	0	0	0	0	0
Target LFI Written	0	0	0	0	0	0	0	0	0	0	0
Target SAC Written	0	0	0	0	0	0	0	0	0	0	0
Target Income Protection Writ	0	0	0	0	0	0	0	0	0	0	0
Target Investments Written	0	0	0	0	0	0	0	0	0	0	0
Target Pensions Written	0	0	0	0	0	0	0	0	0	0	0
Target Fees Written	0	0	0	0	0	0	0	0	0	0	0
Totals (Written Targets)	0	0	0	0	0	0	0	0	0	0	0
<b>Completed Targets</b>											
Target Mortgages Completed	0	0	0	0	0	0	0	0	0	0	0
Target Fees Completed	0	0	0	0	0	0	0	0	0	0	0
Target LFI Completed	0	0	0	0	0	0	0	0	0	0	0
Target SAC Completed	0	0	0	0	0	0	0	0	0	0	0
Target Income Protection Com	0	0	0	0	0	0	0	0	0	0	0
Target Investments Completed	0	0	0	0	0	0	0	0	0	0	0
Target Pensions Completed	0	0	0	0	0	0	0	0	0	0	0
Target Fees Completed	0	0	0	0	0	0	0	0	0	0	0
Totals (Completed Targets)	0	0	0	0	0	0	0	0	0	0	0
<b>Written Business</b>											
Mortgages Written	0	0	0	0	0	0	0	0	0	0	0
Fees Written	0	0	0	0	0	0	0	0	0	0	0
LFI Written	0	0	0	0	£1,299	£1,297	0	0	0	0	0
SAC Written	0	0	0	0	0	0	0	0	0	0	0
Income Protection Written	0	0	0	0	0	£700	0	0	0	0	0
Investments Written	0	0	0	£1,428	£7,883	£1,800	£4,800	0	£1,900	£1,900	0
Pensions Written	0	0	0	0	0	0	0	0	0	0	0
Fees Written	0	0	0	0	0	0	0	0	0	0	0
Written Totals	0	0	0	£1,428	£9,983	£3,597	£6,600	0	£3,800	£3,800	0
<b>Completed Business</b>											
Mortgages Completed	0	0	0	0	0	0	0	0	0	0	0
Fees Completed	0	0	0	0	0	0	0	0	0	0	0
LFI Completed	0	0	0	0	£1,299	£963	0	£874	0	0	0
SAC Completed	0	0	0	0	0	0	0	0	0	0	0
Income Protection Completed	0	0	0	0	0	£700	0	0	0	0	0
Investments Completed	0	0	0	£1,428	£8,246	0	0	£4,800	£1,900	0	0
Pensions Completed	0	0	0	0	0	0	0	0	0	0	0
Fees Completed	0	0	0	0	0	0	0	0	0	0	0
Completed Totals	0	0	0	0	£2,727	£9,163	0	£6,774	£1,900	£1,900	0
<b>Written Income</b>											
Fees Written	0	0	0	0	0	0	0	0	0	0	0
LFI Written	0	0	0	0	£1,400	£300	0	0	0	0	0

Toolbar: Home, Tools, Accounts, Performance, Workflow, New Case, Save, Print, Print Preview, Home, Mortgage, Life Policy, SAC Policy, Dashboard, Send Email, Performance Explorer, Compliance Manager, Launch Adviser System.



## Getting started

### Target Setting

You can also set targets for individual advisers. To do so, just go back to the 'performance explorer' tab.

By clicking the tab as shown above. This will bring you back to your list of advisers. **'Right click'** on the individual adviser in question and click 'show data' you will then be able to choose next year.

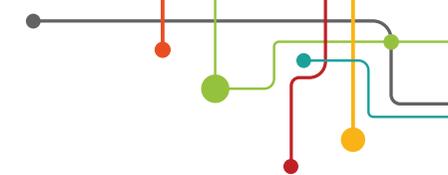
**Performance Explorer**

**Kealy Wal (Jan 13 - Nov 13)**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Written Targets</b>												
Target Mortgages Written	0	0	0	0	0	0	0	0	0	0	0	0
Target Procs Written	0	0	0	0	0	0	0	0	0	0	0	0
Target Life Written	0	0	0	0	0	0	0	0	0	0	0	0
Target B&C Written	0	0	0	0	0	0	0	0	0	0	0	0
Target Income Protection W	0	0	0	0	0	0	0	0	0	0	0	0
Target Investments Written	0	0	0	0	0	0	0	0	0	0	0	0
Target Pensions Written	0	0	0	0	0	0	0	0	0	0	0	0
Target Fees Written	0	0	0	0	0	0	0	0	0	0	0	0
Target Written Targets	0	0	0	0	0	0	0	0	0	0	0	0
<b>Completed Targets</b>												
Target Mortgages Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target Procs Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target Life Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target B&C Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target Income Protection Co	0	0	0	0	0	0	0	0	0	0	0	0
Target Investments Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target Pensions Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target Fees Complete	0	0	0	0	0	0	0	0	0	0	0	0
Target Completed Targets	0	0	0	0	0	0	0	0	0	0	0	0
<b>Written Business</b>												
Mortgages Written	0	0	0	0	0	0	0	0	0	0	0	0
Procs Written	0	0	0	0	0	0	0	0	0	0	0	0
Life Written	0	0	0	0	0	0	0	0	0	0	0	0
B&C Written	0	0	0	0	0	0	0	0	0	0	0	0
Income Protection Written	0	0	0	0	0	0	0	0	0	0	0	0
Investments Written	0	0	0	0	0	0	0	0	0	0	0	0
Pensions Written	0	0	0	0	0	0	0	0	0	0	0	0
Fees Written	0	0	0	0	0	0	0	0	0	0	0	0
Written Totals	0	0	0	0	0	0	0	0	0	0	0	0
<b>Completed Business</b>												
Mortgages Completed	0	0	0	0	0	0	0	0	0	0	0	0
Procs Completed	0	0	0	0	0	0	0	0	0	0	0	0
Life Completed	0	0	0	0	0	0	0	0	0	0	0	0
B&C Completed	0	0	0	0	0	0	0	0	0	0	0	0

Taskbar: Performance Explorer x PrintPreview x Kealy Wal (Jan 13 - Dec 13) x

Search: 0 Match Found | Back | Next



## Getting started

You will see next year's table, which should currently show all zeros.

You can then type figures into data fields provided to set targets as per below, ensuring you then press **'Save'**.

This will set targets to monitor and compare for the following year.

### 'Show Lender Spread'

The second option down on **'Performance Explorer'** you will see is **'Show Lender Spread'**.

If you then hover your mouse over the graph/lender, as per below you will see a pop up which gives the percentage of Mortgages, giving you instant management intelligence.

This can also be viewed as a pie chart by clicking on **'Show lender spread as a pie chart'** which can be located in the drop down underneath **'Show lender spread'**.

hen Lee

Performance Explorer

Show Data

- Show Lender Spread
- Show Lender Spread As Pie Chart
- Show Product Spread
- Show Product Spread As Pie Chart
- Show Provider Spread
- Show Provider Spread As Pie Chart
- Show Current Hotbox
- Show Opportunity Manager
- Show Future Opportunities

Current Month  
Last 3 Months  
Year To Date  
Current Year  
Last Year  
**Next Year**  
Q1 - This Year  
Q2 - This Year  
Q3 - This Year  
Q4 - This Year

Month	Jan	Feb	Mar	Apr
<b>Written Targets</b>				
Target Mortgages Written	100	0	0	0
Target Procs Written	£55	£0	£0	£0
Target Life Written	£55	£0	£0	£0
Target B&C Written	£22	£0	£0	£0
Target Income Protection Writ	£1,000	£0	£0	£0
Target Investments Written	£1,321	£0	£0	£0
Target Pensions Written	£121	£0	£0	£0
Target Fees Written		£0	£0	£0
Totals (Written Targets)	£2,574	£0	£0	£0
<b>Completed Targets</b>				
Target Mortgages Completed	0	0	0	0
Target Procs Completed	£0	£0	£0	£0
Target Life Completed	£0	£0	£0	£0
Target B&C Completed	£0	£0	£0	£0
Target Income Protection Corr	£0	£0	£0	£0
Target Investments Complete	£0	£0	£0	£0



## Getting started

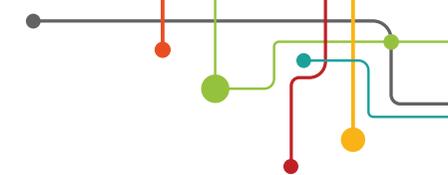
### 'Show Product spread'

This next option from 'Performance Explorer' will break down the types of products sold by your chosen advisers, enabling you to recognise product patterns.

For example...

Are Protection or buy to let mortgages more popular during the summer months? This can also be viewed as a bar or pie chart. By again selecting from the initial options as per below;

The screenshot shows the 'Performance Explorer' interface. At the top, there is a purple header with the text 'Performance Explorer' and a magnifying glass icon. Below the header, a stacked bar chart displays data for June 2013. A legend indicates five categories: June 2013 : 1 (red), June 2013 : 2 (blue), June 2013 : 1 (green), June 2013 : 2 (purple), and June 2013 : 1 (teal). A tooltip for the teal segment shows: 'Lender = BM SOLUTIONS', 'Month = Jun 13', and 'Number of Mortgages = 2'. Below the chart, a dropdown menu is open, listing options: 'Show Data', 'Show Lender Spread', 'Show Lender Spread As Pie Chart', 'Show Product Spread' (highlighted), 'Show Product Spread As Pie Chart', 'Show Provider Spread', and 'Show Provider Spread As Pie Chart'. To the right of the menu, a secondary dropdown shows time periods: 'Current Month', 'Last 3 Months', 'Year To Date', and 'Current Year' (highlighted).



## Getting started

Just left click on your mouse and you can spin the Axis in any way you wish to view the chart.

### Performance Explorer

The screenshot displays the Performance Explorer interface. At the top, there is a purple header with the title 'Performance Explorer' and a small icon. Below the header, there are two donut charts side-by-side. The left donut chart is mostly blue with a small slice of orange and a slice of green. The right donut chart is also mostly blue but with a larger slice of orange and a slice of green. Below the donut charts, there is a bar chart with a single blue bar. The bar chart has a vertical axis on the left and a horizontal axis at the bottom. The bar chart is enclosed in a dark blue border.



## Getting started

### **‘Show provider spread’**

This will give you chart results of which providers are sold most by the adviser in question. For instance this Adviser had sold to one provider at one month of the year

### **‘Show Current Hotbox’**

This option is to enable management to review the Advisers Hotbox. You can view by an individual, office, team, region or even by the company as a whole.

This gives managers the chance to keep up to date with their advisers performance and to evaluate where improvements can be made, or recognise high performance.

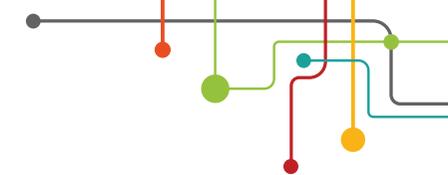
Opportunities will display all the opportunities for the whole business or for a single adviser as well as give the ‘Status’ of each opportunity. You can view the ‘Last Action’ taken, equally you can easily identify if an adviser is auctioning leads.

To access **‘Current Hotbox’**, right click on **‘Advisor’**, **‘all Advisers’** or the team in which you wish to review, and select the **‘show current Hotbox’** option.

As shown here if you drag and drop the column header into the darker grey line you can organise the information that you wish to review in alphabetical order.

### **‘Show opportunity manager’**

This next option shows a summary of the opportunities for the Adviser in question, below is an example of the breakdown.



## Getting started

This shows one month, however you can review this over your chosen time period. You can also view these results by right clicking on an opportunity type and selecting create chart option .

This will then be displayed as a chart, allowing you to recognise any patterns.

**Performance Explorer**

Client

Pri...	Campaign	Last Action	Created By	Created
Client: Byrne (Count=1)				
Client: Hessey (Count=1)				
Client: Michaelson (Count=1)				
Client: O'connell (Count=1)				
Client: Pearce (Count=1)				
Client: Prescott (Count=1)				
Client: Rimmer (Count=1)				
Client: toye (Count=1)				
Client: Wycherley (Count=1)				

Performance Explorer - Angela Andrew (Oct 13 - Oct 13)

Opportunity Summary

Month	Count
New Opportunities	5
New Opportunities	5
Negotiator	0
Referrals	0
Self Generated	5
System	0
New Opportunity - Type Breakdown	0
Advisor referral	3
Introducer	2
Completed Opportunities	0
Result Breakdown	0
Signed Up	4
NPW - Not Interested	1
Detailed Breakdown	0
Advisor referral	2
Signed Up	2
Introducer	1
NPW - Not Interested	1
Life Events	1
Signed Up	1
TCF Questionnaire Opportunity	1
Signed Up	1
Written Business	0
Mortgages	3
Life Policies	2
SAC Policies	0
Income Protection Policies	0
Pensions	0
Investments	0
Completed Business	0
Mortgages	1
Life Policies	1
SAC Policies	0
Income Protection	0
Pensions	0
Investments	0



## Getting started

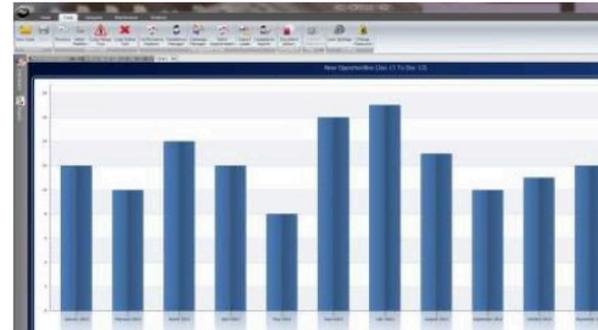
### 'Show future opportunities'

This option will show you any postponed opportunities which are due in this Advisers hotbox for the next 12 months.

Here is an example of up to 3 months

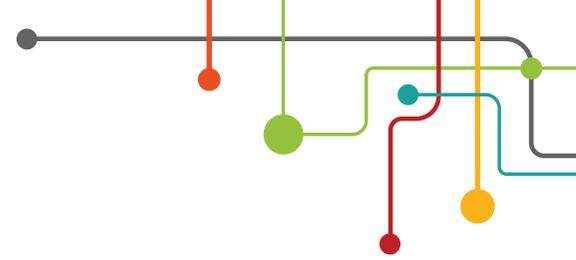
This will also show you what types of review are due to pop up.

## Performance Explorer

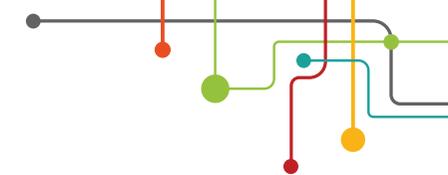


Month	Nov-13	Dec-13	Jan-14
Future Reviews			
Annual Reviews			
Standard Annual Reviews	0	0	0
Annual Reviews - Interest Only	0	0	0
Annual Reviews - Part & Part	0	0	0
Annual Reviews - Repayment	0	0	0
Mortgage Reviews	0	0	0
Life Reviews	0	0	0
Pension Reviews	0	0	0
Investment Reviews	0	0	0
Postponed Opportunities	4	0	1
Missed Opportunities			
Buildings & Contents	0	0	0
Life	0	0	0
CIC	0	0	0
Income Protection	0	0	0
Pensions	0	0	0

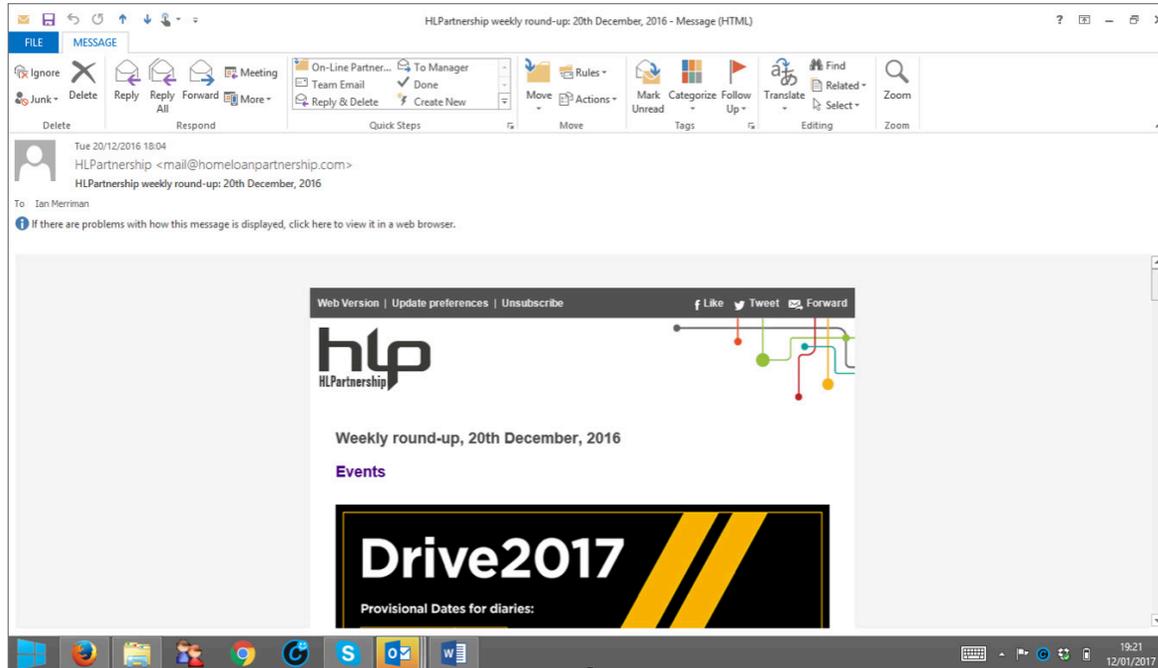




# HLPartnership CRM Using the free Blogs for your marketing



Every week or so HLPartnership send all the partners a weekly update by e-mail. The update contains information on industry news, product partners, product news and regulatory news.



In addition to this pre-approved blogs are provided for the HLPartners to use free of charge on their websites, e-mail communications and Facebook (Social Media).

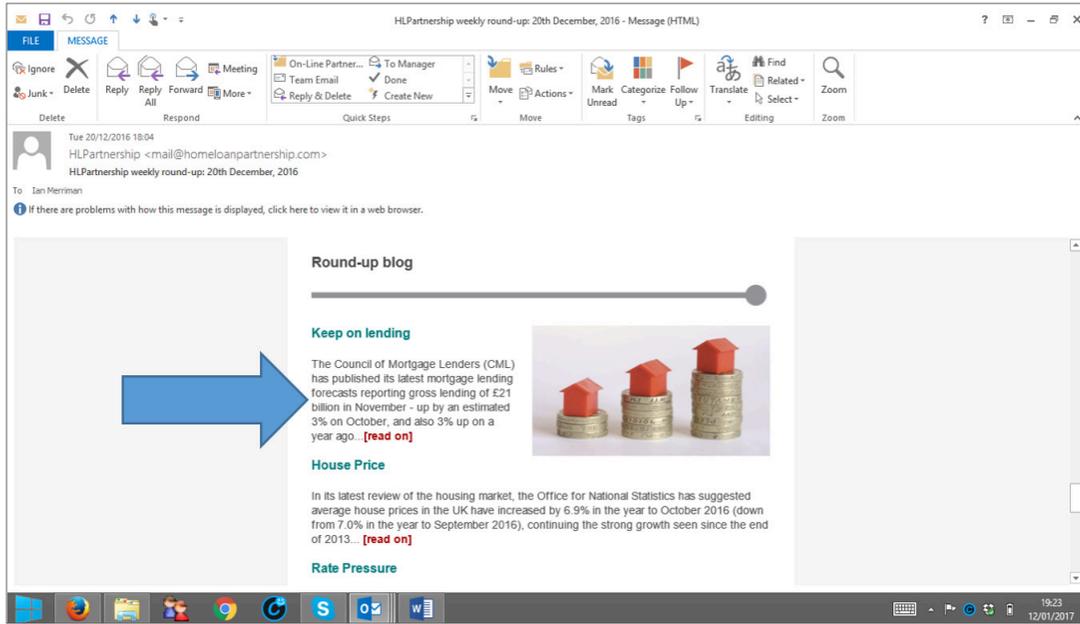
Simply scroll through the e-mail to the section marked Round-up blog:

Every week you will be able to find articles that are a real blend of industry related topics for end consumers or sometimes more quirky articles that combined will allow the partners to remain in regular contact with their client base using both traditional (e-mail) and modern communications (Facebook) and reinforce that company and individual brand.

Usually there are between 3 and 5 new articles that can be used.

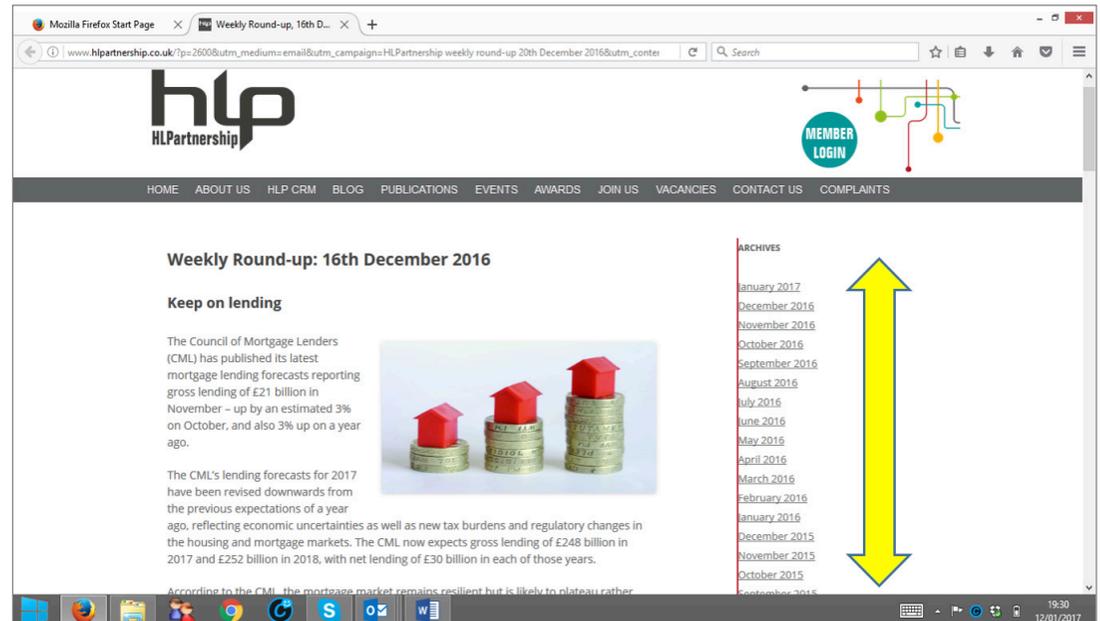
In the example below 5 articles were supplied covering such diverse topics as:

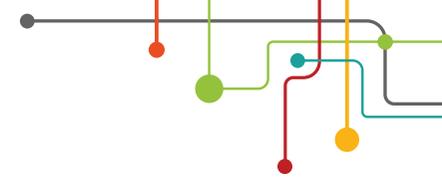
- Keep on Lending
- House Price
- Rate Pressure
- Competition
- What's in a word



By clicking through on any one of the articles you will then be able to access the historical library of previous blogs (See the yellow arrow)

Simply click on the article to read and access the full content:





## Weekly Round-up: 16th December 2016

### Keep on lending

The Council of Mortgage Lenders (CML) has published its latest mortgage lending forecasts reporting gross lending of £21 billion in November – up by an estimated 3% on October, and also 3% up on a year ago.

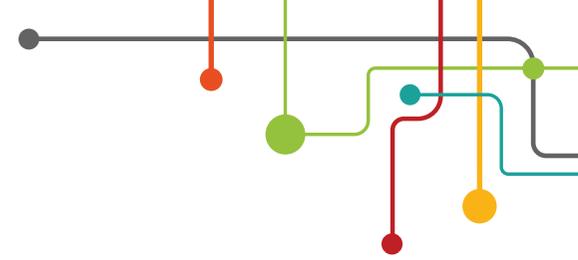


The CML's lending forecasts for 2017 have been revised downwards from the previous expectations of a year ago, reflecting economic uncertainties as well as new tax burdens and regulatory changes in the housing and mortgage markets. The CML now expects gross lending of £248 billion in 2017 and £252 billion in 2018, with net lending of £30 billion in each of those years.

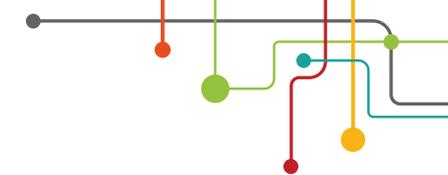
According to the CML, the mortgage market remains resilient but is likely to plateau rather than grow much for the next couple of years, whilst property transactions look set to drift down slightly. The trade body does not expect house prices to fall, with net lending unlikely to get above £30 billion next year.

As a pre-approved advert specific and bespoke permission is not required from the HLPartnership compliance team to use one of the blogs.

The blogs can be used on a client by client or case by case basis or by using mass marketing support contained within the HLP CRM.



# HLPartnership CRM Communication with Customers within the HLP CRM



The HLP CRM allows the adviser the opportunity to send communications directly to the client from within the client account (Dashboard view).

Any communication sent to the client from within the client account is automatically saved and recorded as a document against the client evidencing that a communication has been sent and at what time.

The communications can be sent either by text or e-mail.

Firstly open a client account within the HLP CRM. This can be done by double left clicking on a client from within the Hotbox or by searching for a particular client from the search facility (Adviser and Office).

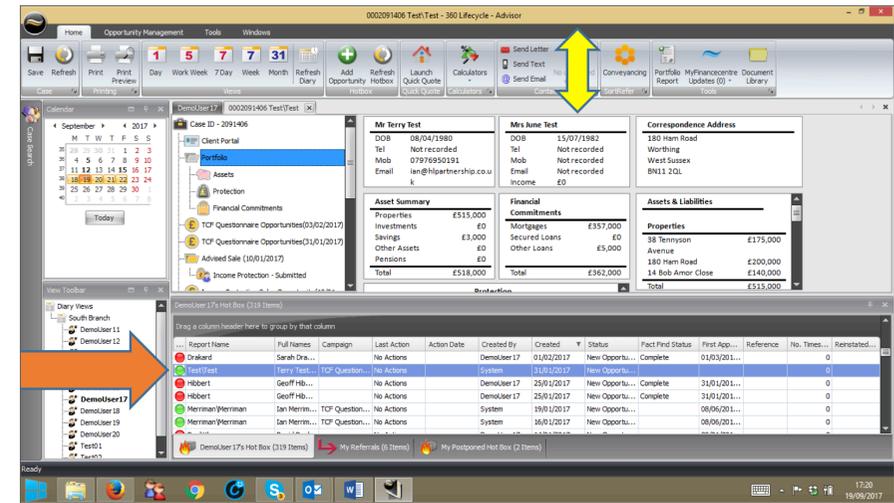
The client dashboard view is then displayed see see diagram top right.

Once in the client dashboard the contact options are then highlighted along the top ribbon in the Contacts section (See yellow arrow):

- Send letter
- Send text
- Send e-mail

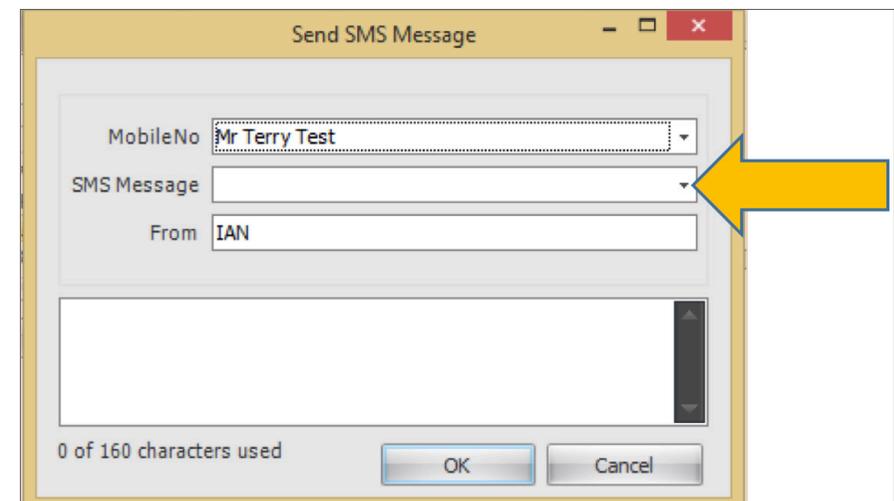
Given the focus on technology, enhancing customer service and reducing your costs, we will focus on sending texts and e-mails.

Both texts and e-mails sent from within the HLP CRM are **free of charge**.



## Texts

To send a text click on the 'Send Text' button. This will then open the following text box for you.



Send SMS Message

MobileNo: Mr Terry Test

SMS Message:

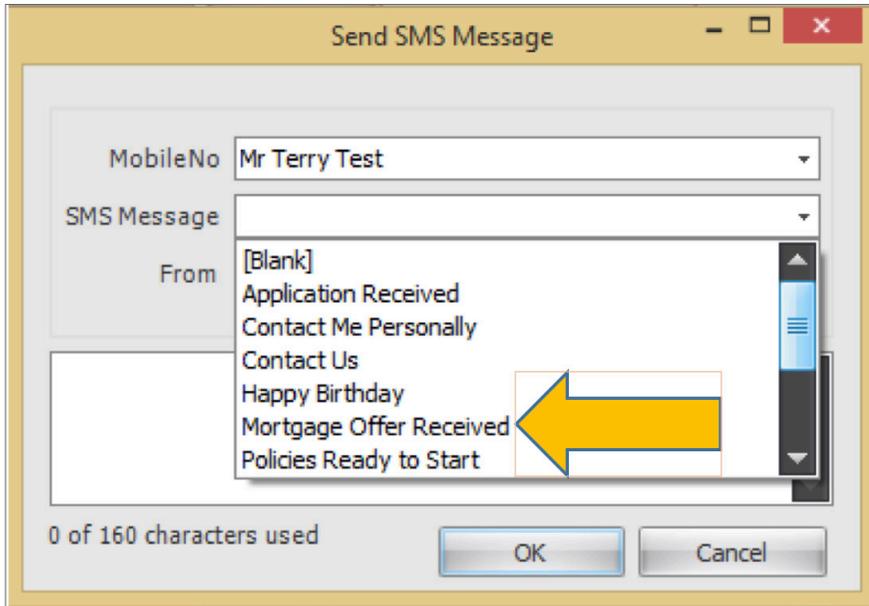
From: IAN

0 of 160 characters used

OK Cancel



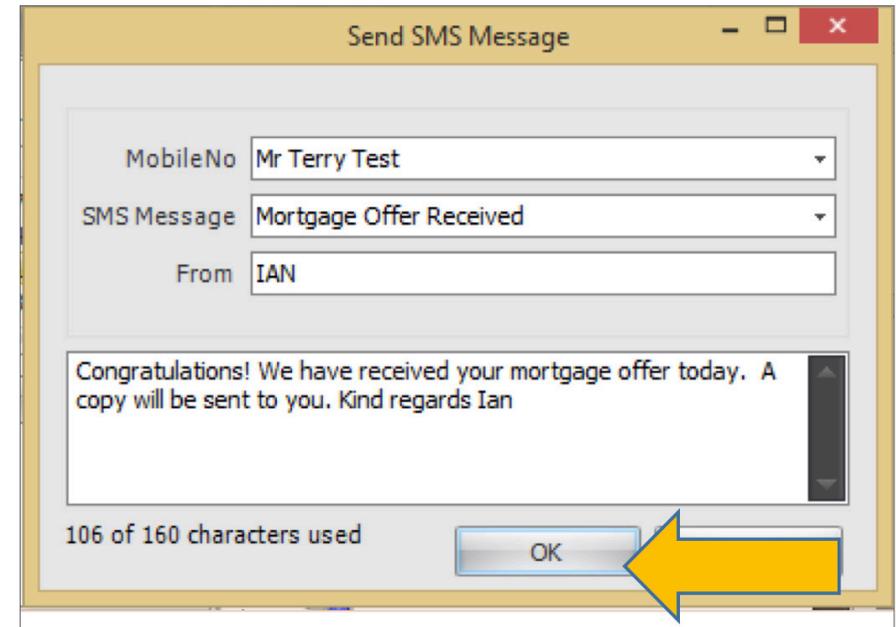
By clicking on the small arrow to the right of the SMS Message as shown above a series of pre-populated message templates are shown for you as indicated below:



To use one of these pre-populated messages just click on the message you want to send.

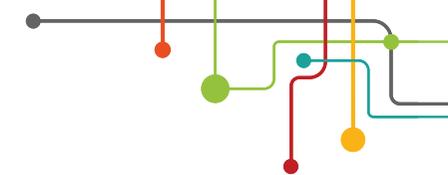
The system will then create the message in the pop up box for you. Each text has the capacity to handle up to 160 characters of text so there is room for additional free text or alternatively you do not have to use a pre-determined template simply select 'Blank' to create your own text message.

Once you are happy to proceed simply click the 'OK' button to send the message.

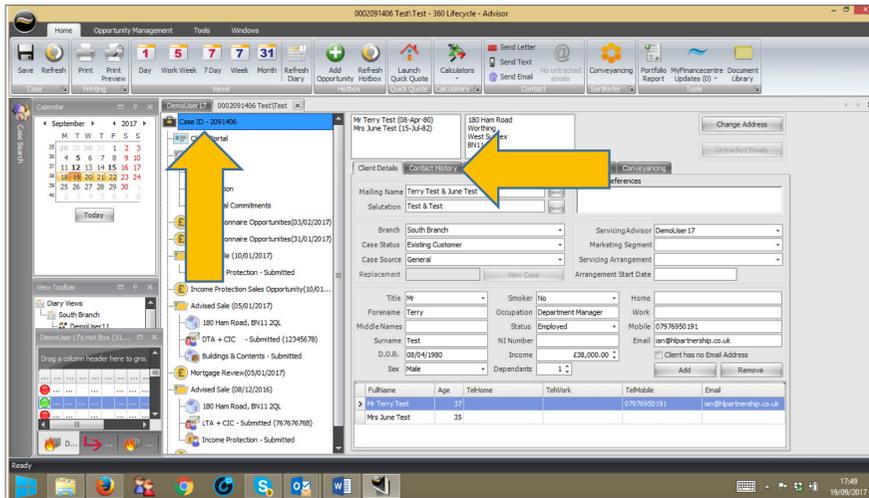


Your message is sent immediately to your client.

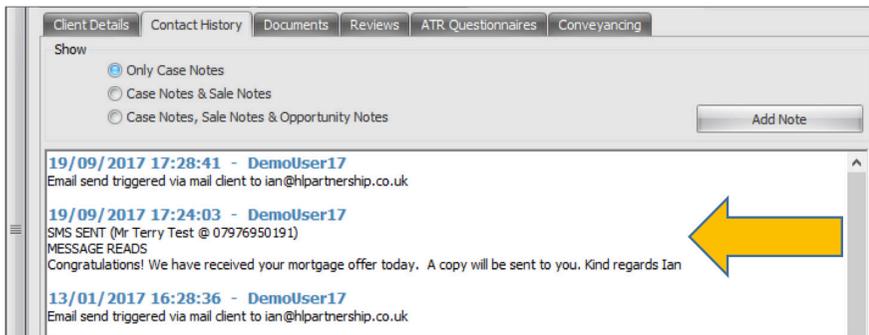
The HLP CRM will then automatically record that the communication has been sent and time stamps that message as well.



To access this simply click on the Case ID of the client.



From here click on the 'Contact History' and the system will show the recording of the message having been sent. See below:

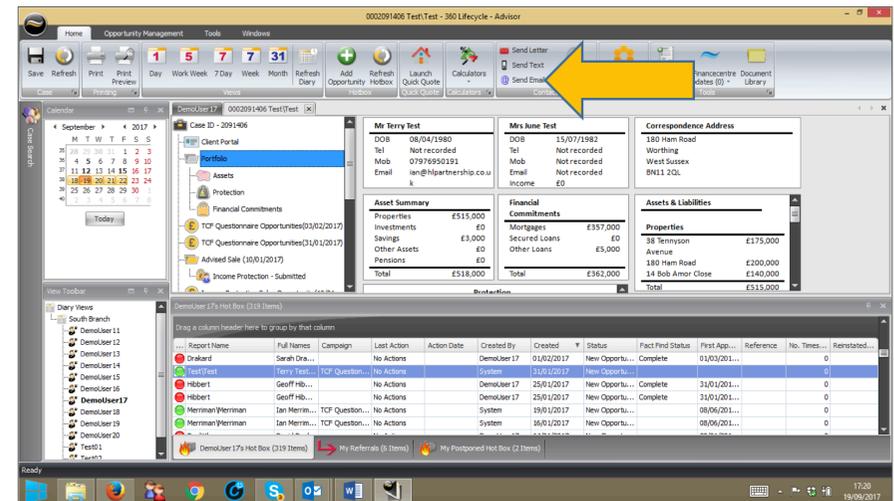


Please note that texts sent from within the HLP CRM and Client Account do not have a facility to reply back to you.

It is important to remember that only clients who have the correct mobile telephone numbers recorded will be able to receive texts.

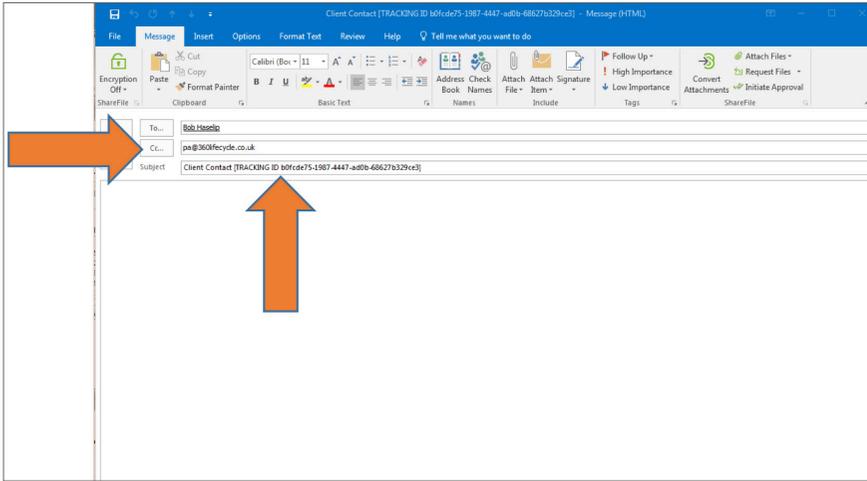
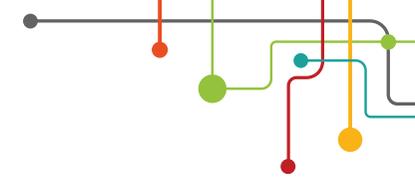
## Emails

To send an email from within the HLP CRM system the process is identical. Only this time you will need to click on 'Send email'. A valid email address is required for your client of course.



In order for this functionality to work your email must be fully integrated with your own work e-mail address – see 'Getting Started' page 6. This would ordinarily be set up when you go live with the HLP Partnership.

Once clicked, the system will take you directly to a compose email screen, (see next page) where you can create your own personal email and attach documents as you see fit i.e. This is ideal to send copies of important documents to clients including the fact-find and suitability letters.



It is important to note that the email again is saved and recorded within the HLP CRM for you.

It does this by allocating a unique tracking ID code to the email in the Subject of the email and bespoke address in the cc section (pa@360lifecycle.co.uk) of the email.

**These must not be removed from the email** although additional information can be added to the Subject of the email in order that you and your customers can easily relate to the content of the email.

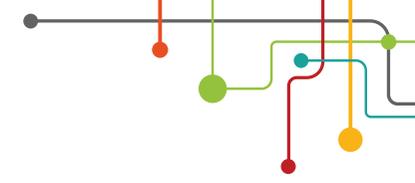


The system records the fact that an email has been sent to the client within the Contact History of the client's dashboard.



A copy of the email content is saved as a document within the documents section of the client dashboard as well.

A client is able to respond directly to the email and should be encouraged to respond by clicking the **'Reply all'** button as this will automatically capture the unique tracking ID code and address in the cc section. This will then ensure that the clients email reply not only hits your normal email in-box but also is automatically recorded within the client file as a document of the HLP CRM for you.



CONTACT:

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Office: 01903 602 664