EMPLOYEE RESPONSIBLITIES

BankcardProsCRM

Leads. Sales. Profits. Success.

CRM Software, Marketing, Recruiting, Training, and Web Design For The Bankcard Industry

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Example Employee / Sales Agent Responsibilities

Bankcard Pros CRM – Employee Responsibilities

Every company or sales organization will have the following departments within their company:

- Sales
- Telemarketing/Call Center
- Using a Third Party Call Center to Set Appointments
- Underwriting and Accounts Processing
- Customer Service and Tech Support
- Equipment Deployment and Support
- Agent Support
- Recruiting and Hiring
- Billing and Accounting
- Management

What elements of the software will each department utilize to perform their duties and responsibilities on a daily basis?

Sales – Sales reps and sales managers will utilize the following CRM features:

- Submitting internal apps
- Using the status section to review the status of their new accounts
- Uploading original signed paperwork, voided checks, previous statements, etc.
- Keeping track of their upfront bonuses and commissions that are pending, approved, or paid
- Using the document download library to download forms
- Using the leads system to manage and track their cold calling, appointments, and tasks for each new lead
- Email or fax letter templates within the leads section
- Using the referral form to receive leads from their referral partners and trade association partners
- Adding links to your sales websites for receiving referral partner leads, new

Example Employee / Sales Agent Responsibilities

applications from visitors, or inquiries and resumes from individuals wanting to become a sales rep for your office

- Creating new trouble tickets for support
- Submitting new business card orders

Inside Call Center / Inside Sales Reps

- Adding individual leads
- Importing multiple lead lists into the system
- Adding notes and logging calls so you can view all activity and results after each contact
- Changing the status of each lead after each contact
- Sending out letter templates to each lead via email or fax
- Calling multiple leads on a daily basis
- Setting up tasks/reminders for sales users
- Setting up appointments and assigning them to sales rep users
- Creating rate quotes
- Importing previous processing statements
- Keeping track or original pricing, prices quotes to lead, and discounts offered to each lead owner
- Convert lead contact information data to an online internal application when the • lead status changes to a sold account

Using a Third Party Call Center to Set Appointments

You are able to add telemarketer user accounts to the system and allow 3rd party telemarketing companies to login to your CRM, and use the leads section to import leads and start on a telemarketing campaign. The 3rd party telemarketer users will utilize all the features of the leads system just like your inside sales reps within your internal call center.

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- Importing multiple lead lists into the system

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Underwriting and Accounts Processing

- Review all apps submitted by all users using the internal app system
- Responsible for the “User Apps In” status level in the status section
- Reviews all apps submitted to insure all fields of the app are filled out properly and nothing is missing
- Insures the sales reps uploaded all original signed paperwork into the status section under each merchant app
- If sales reps fax in original paperwork, make sure all paperwork is imported into the status section under each merchant app
- After reviewing the online app and original paperwork submitted, responsible for changing the status of the app to one of the following: Being reviewed, App received, Waiting approval, Pending, Declined, Approved, Lease pending, Lease decision, Lease approved
- Responsible for inputting the MID# into the system for all merchant accounts approved

Equipment Deployment and Support

The equipment deployment and support staff users are responsible for the following status levels: Approved, File Build Ready, Order Equipment, Ready to Ship, Shipping Held, Reprogram Equip, Ready to Install, Install Appt, Installed, and Verify Lease

Example Employee / Sales Agent Responsibilities

The equip deployment staff will view each merchant account, including the equipment options, and the equipment file build and programming option page to insure the equipment is programmed properly before shipping to merchants

Customer Service and Tech Support

- The customer service and support staff users are responsible for the following status levels: Live Merchant, Welcome Call
- When receiving calls for merchant, responsible for searching for the customer in the system to view the status of the merchant, including the Client Status and Client Priority
- When assisting the merchant on the phone, and you are able to answer their questions to their satisfaction, responsible for logging the call and adding notes/history for the call so you can view all activity for the merchant
- If you are unable to resolve the merchants issue on the phone and other employees need to be involved, you are responsible for creating a new trouble ticket for that merchant, and assigning the trouble ticket to the staff member who can resolve the issue. When creating a trouble ticket for a merchant, the system will automatically identify the user who created the trouble ticket, the merchant, the sales rep, and the staff member you assigned the trouble ticket to.

Billing and Accounting

- The billing and accounting staff users are responsible for the following status levels: Live Merchant, Prepare Invoice, Lease Funded, Payroll Approved, Payroll Paid, Cancel, Inactive/Closed
- The billing and account employee is responsible for viewing all user invoices in the status level to insure all lease funding pay, upfront bonuses, and commissions are correctly calculated

Recruiting and Hiring / National Sales Manager / ISO Relationship Manager

- The employees responsible for recruiting and hiring new sales people are responsible for managing the recruiting section on the home page of the CRM

Example Employee / Sales Agent Responsibilities

- Responsible for requiring all individuals to fill out the recruiting form
- Responsible for evaluating and reviewing all apps and resumes and categorizing all applicants by strengths/weaknesses and priorities
- Responsible for calling and interviewing all applicants over the phone
- Responsible for logging all calls and adding notes/history for the call so you can view all activity for the new applicant
- Responsible for selling the strengths of the company and the benefits of working for the company.
- Responsible for emailing additional marketing materials to the applicant.
- Responsible for negotiating buy rates and pricing for the applicant
- Responsible for emailing all contracts and paperwork to all applicants wishing to join the company
- Responsible for converting the new applicant contact details to a new user profile in the system
- Responsible for uploading all signed and executed contracts and paperwork into the system under each sales rep profile.
- Responsible for providing initial training on how to use the CRM
- Responsible for providing a starter and welcome kit with all training materials and paperwork to start selling

Agent Support / ISO Relationship Manager

- When receiving calls from sales reps and employees, responsible for searching for the customer in the system to view the status of the merchant, including the Client Status and Client Priority
- When assisting the sales reps and employees on the phone, and you are able to answer their questions to their satisfaction, responsible for logging the call and adding notes/history for the call so you can view all activity for the sales reps and employees
- If you are unable to resolve the sales reps and employees issue on the phone and other employees need to be involved, you are responsible for creating a new trouble ticket for that sales rep/employee, and assigning the trouble ticket to the staff member who can resolve the issue. When creating a trouble ticket for a sales

Example Employee / Sales Agent Responsibilities

reps and employees, the system will automatically identify the user who created the trouble ticket, the sales rep/employee name, and the staff member you assigned the trouble ticket to.

Management / Ownership

- On a daily basis, management will login to the CRM system and monitor the entire company's activity for all users
- Monitor and track all activity for all employees
- Monitor and track all activity for all inside sales reps
- Monitor and track all activity for all outside sales reps
- Monitor and track all activity for all sales managers
- Monitor and track all activity for the underwriting department
- Monitor and track all activity for the equipment deployment department
- Monitor and track all activity for the agent support department
- Monitor and track all activity for the recruiting and hiring department
- Monitor and track all new accounts boarded into the system
- Monitor and track all activity for new leads imported into the system
- Monitor and track all activity for new leads assigned to all users
- Monitor and track all activity, results, notes, history for all leads contacted
- Monitor and track all activity for all trouble tickets created into the system
- Monitor and track all activity for all new appointments added
- Monitor and track all activity for all new tasks/reminders added
- Monitor and track all activity for all new rate quotes added in the system
- Monitor and track all activity for all payroll pending, payroll approved, and payroll paid
- Monitor and track all activity for all new invoices including upfront bonuses, commissions, and equipment lease commissions and funding paid to users
- Add news and announcements for all users