

# Solution Overview

## **Software Description**

ATLAS (Automated Telemarketing Leads Administration System) is an automated system for managing and distributing leads, enabling agents to be more efficient and productive. It saves time and money as it automatically distributes leads to agents for follow-up actions. ATLAS allows telesales agents to re-schedule return calls or route the calls to the appropriate persons when necessary.

The system keeps historic activities and voice recording for retrieval and verification. The following are some of the features and functionalities provided by ATLAS.

### **Leads Upload**

- q Provides an interface for the uploading of leads from external sources for allocation.
- q Provides the flexibility of mapping lead file columns against data fields in the system.
- q Retains historical information of all uploaded leads file.

### **Leads Allocation and Aging**

- q Distributes leads from internal or external sources both automatically and/or manually.
- q Manages and distributes all marketing leads from a central pool based on pre-defined criteria set by the sales managers. These criteria may include geographic territory, lead quality, daily/weekly allocations, seniority or even "round-robin" distribution.
- q Keeps track of leads aging from the date of its assignment. Leads that have aged past a certain pre-defined expiry period will be returned to the pool to be re-allocated to another agent.

### **Leads Tracking**

- q Details of the leads allocated to an agent such as lead type, allocation date, customer information, interested product are presented to the agent for follow up.
- q Agents can update the status of the leads, latest customers information (telephone numbers, mailing address or e-mail address) upon following up with a prospect. A 'before & after' image of all customer information changed will be displayed to the users upon updating.
- q A 'tickler' function allows agents to set a reminder to follow up with a prospect should the agent were unable to contact the prospect in his/her earlier attempt.
- q Administrators can view agent activity, lead pipeline and lead status levels to effectively load balance leads, or to establish additional assignments, roles and permissions.
- q Administrators can monitor the productivity of sales agents by call duration, number of calls made, successful calls, rejects or other prescribed criteria measured against standard of performance (SOP).

### **Computer Telephony Integration**

- q ATLAS provides the soft-dialing capabilities which tracks all calls placed by an agent to prospects.
- q Tracked calls will be saved and stored in a central location for access by QA personnel when carrying out pre-vetting of prospects submission.

### ***Solicitation Tools***

- q To facilitate an agent to present various products' financial scenarios, a financial calculator is provided to allow the agent to compute 'on-the-fly', the values as inquired by the prospect.
- q To ensure agents do not deviate to far from a products sales pitch, a sales script function allows sales manager to devise the types of questions to be posed to a prospect. These scripts can be defined according to the various product types.

### ***Approve/Reject Submissions***

- q Includes "pre-vetting" to verify the verbal acceptance of a product sold.
- q Supports the capability for QA personnel to retrieve agents telephone conversations to 'pervet' the acceptance of a product sold.
- q Upon completion of pre-vetting the submissions, the QA personnel can then update the status of vetted submissions. A wide range of prevet status can be defined in the system to depict the reasons of rejections clearly for further follow-up.

### ***Reports/Inquiries***

A wide range of reports and inquiries is supported in the system to facilitate the coordinators to manage the status of leads assigned to the agents. These reports/inquiries will include:

- q Tracking the available leads for distribution.
- q Reminders on overdue leads.
- q Submission details of successful leads.
- q Leads rejected by prospects.
- q Agent's performance data by date and month and others.

However, reports incorporated in ATLAS or any additional reports to be customized for the customer's specific requirements will only be covered for 12 reports. Additional report/inquiries requirements will be accommodated as a chargeable item.

## ***Key Benefits***

With unprecedented pressure to do more with less (and deliver greater results), the customer's investment in ATLAS will allow them to:

- q Provide better services to customers and prospects.
- q Greatly improve the management of the business and people.
- q Provide information to better track and optimize a sales campaign's performance.
- q Sharpening of marketing efforts and programs.
- q Streamline leads allocation for faster and efficient turnaround time.
- q Build a more collaborative and cross-functional process with further integration with Soft-Skills SPRINT (Sales Performance, Rewards, & Incentive Tracking System).