

Using Diversification Opportunities

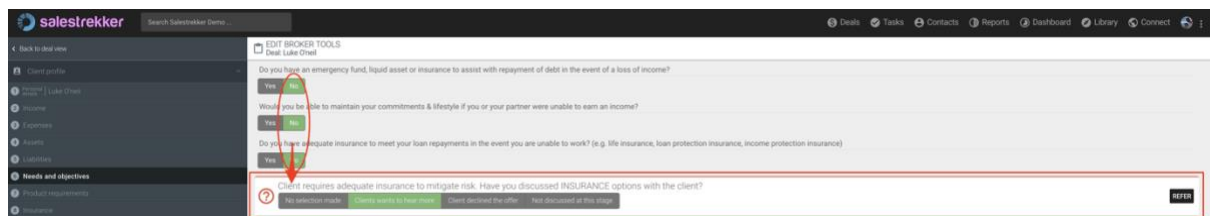
Client Profile questions

Diversification opportunities will appear in the Client profile/tools section as the data is entered. The idea here is that users are reminded to ask applicants the question at the time of the interview. These questions appear only in broker view and are not visible in the Client Portal.

Note that only set up opportunities will show in Client Profile.

Users should select one of three available options:

- Client would like to hear more;
- Client declined the offer;
- Not discussed at this stage.



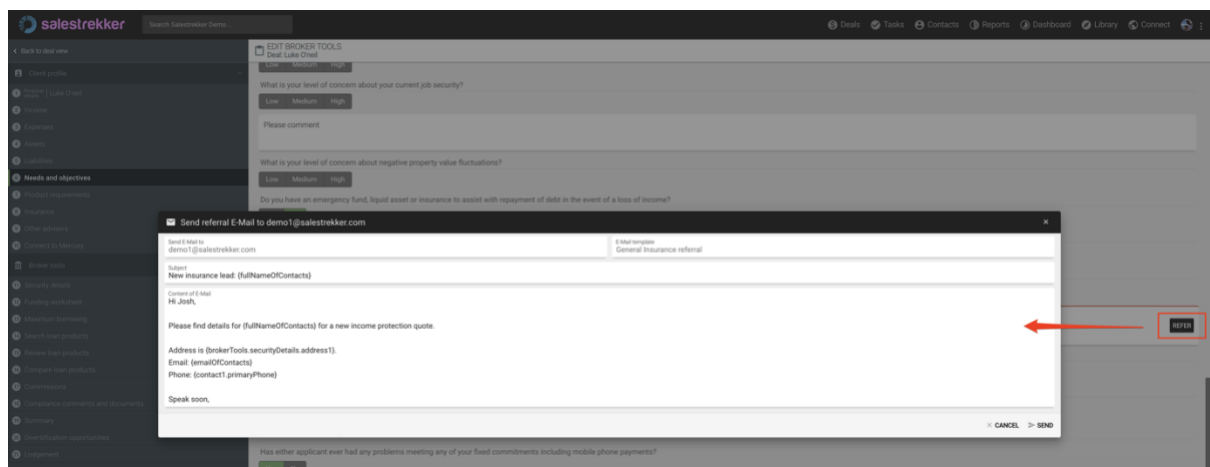
Even if client declined the offer can be beneficial to the broker as this will be recorded in the compliance documents and can be utilised to defend broker position in case of any 'best interest duty' discussions later on.

Typically, these questions will appear:

- If the client is self-employed;
- If Needs and objectives questions are answered in a way to warrant a diversified service;
- In the Product requirements tab, if the client indicates they require some additional services.

Some questions may appear more than once through the Client profile and tools.

To refer on the spot, simply click on 'Refer' button (or API service button if in place), review email and click 'Send'. Note that if client declines the offer, referral button will be disabled and greyed out.



When the client answer is selected, the section will turn green (from the original red). Client answers are also colour coded: green/red/amber.

Client is purchasing a property. Have you discussed a complimentary UTILITY CONNECTION/RELOCATION SERVICE? myconnect

No selection made | Clients wants to hear more | Client declined the offer | Not discussed at this stage

Client is purchasing a property and might require CAR BUYING ADVOCACY. REFER

No selection made | Clients wants to hear more | Client declined the offer | Not discussed at this stage

Client is purchasing a property and might require CAR FINANCE service. REFER

No selection made | Clients wants to hear more | Client declined the offer | Not discussed at this stage

Client is purchasing a property. Have you discussed a referral to BUILDING SERVICES providers? REFER

No selection made | Clients wants to hear more | Client declined the offer | Not discussed at this stage

Broker Tools Summary Tab

A summary of questions that appeared in Client profile will appear at the end of Broker Tools in a separate tab, Diversification Opportunities.

There are three sections here: Diversification opportunities; Missed opportunities and Comments section:

salesrekker Search Salestrekker Demo ... Deals Tasks Contacts Reports Dashboard Library Connect

Back to deal view

Client profile

Broker tools

Security details

Funding worksheet

Maximum borrowing

Search loan products

Review loan products

Compare loan products

Commissions

Compliance comments and documents

Summary

Diversification opportunities

Lodgement

EDIT BROKER TOOLS Deal: Milos Milanovic

Diversification opportunities

OPPORTUNITIES	DISCUSSED OPPORTUNITY WITH CLIENT/S?	ACTION
Client is purchasing a property and might require CAR BUYING ADVOCACY.	Clients wants to hear more	REFER
Client is purchasing a property and will require a CERTIFICATE OF CURRENCY/HOME AND CONTENTS insurance to complete loan settlement.	Clients wants to hear more	vero
Client is purchasing a property and might require CAR FINANCE service.	Client declined the offer	REFER
Client is purchasing a property and will require a solicitor to assist with the CONVEYANCING and complete loan settlement.	Not discussed at this stage	REFER
Client is purchasing a property. Have you discussed a complimentary UTILITY CONNECTION/RELOCATION SERVICE?	No selection made	myconnect
Client is purchasing a property. Have you discussed a referral to BUILDING SERVICES providers?	Not discussed at this stage	REFER

Missed opportunities (Referrals not set up yet)

OPPORTUNITIES	DISCUSSED OPPORTUNITY WITH CLIENT/S?	ACTION
Client is purchasing a property and might require DEPOSIT GUARANTEE.	No selection made	REFER

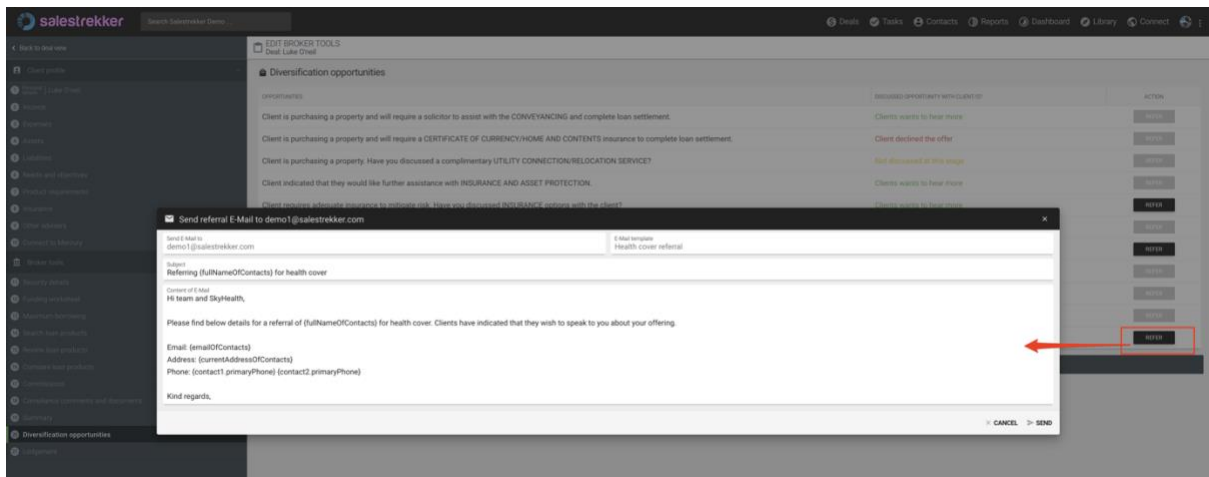
Diversification opportunities comments

Please comment

< PREVIOUS NEXT >

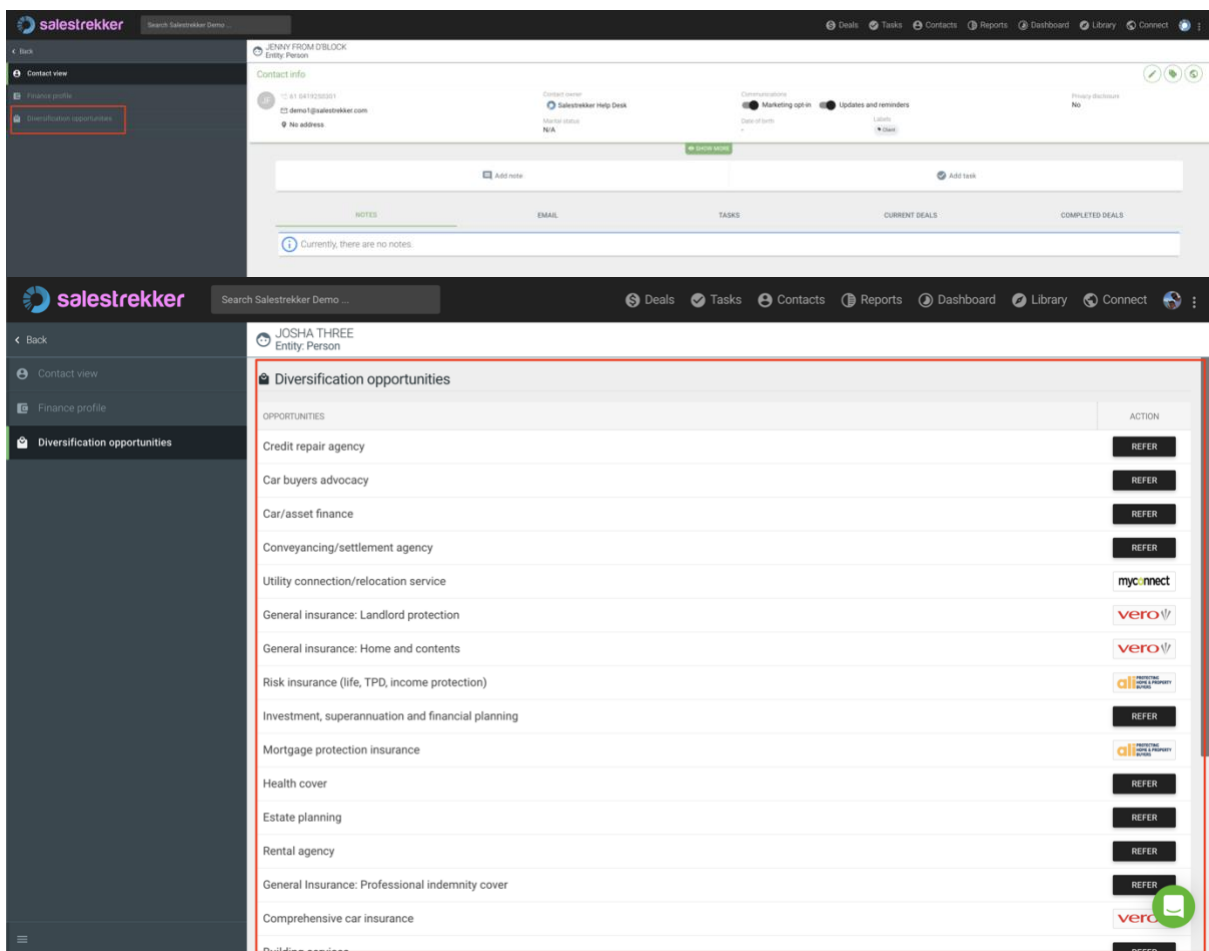
Services are highlighted in CAPS and answers are colour coded (green = yes, red = no, amber = N/A). Where the referral email/API isn't set up, or the answer was 'declined', the 'Refer' button will be greyed out.

To refer, simply click on the refer button, review email and click 'Send'. Note that cc/bcc addresses are set in email template settings. Where multiple referrers are set, select a referrer from the drop down list:



Contact View Tab

During the review process (that can be scheduled using recurring task feature), users can discuss any of the available options and refer clients on the spot.



Note that referral email in Contact view will only cover referrer email address; email subject and body will have to be manually entered:



Adding a Summary Table to a Document

For the compliance purposes, a summary table with the outcomes of diversification discussions can be added to a document. Merge code can be found in Settings > Document templates/Merge fields button. Field is under the 'Deal - Tables' grouping of merge fields. Type 'diversification' in merge field search and click on the relevant option to copy. Then add to your compliance or sales document.

