
User
Documentation
for
MAGNAware
Owner Referral
Leads and
MiniVacs



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1 Owner Referral

1.1 PURPOSE

To maintain communications with owners to gather leads and enter and track concerns. The gathered leads are linked to the owners and optionally to other leads. The module allows you to monitor your contacts with the owners and keep call back lists. The statistics by owner allow you to view number of referrals, tours and sales.

The collected leads are then available in regular telemarketing venues and can be converted into direct drives (tours with no vacation package aspect) and vacation bookings. The vacation bookings have all the facilities of the telemarketing system. Additional reporting segregates the owner referral and non buyer referrals to assist with assignment of the sales person who originally toured with the original owners, the original owners purchase and any contract information necessary. Lead inventories of referral leads can be separated from regular leads to produce reports of lead inventories.

1.2 Outline

The major areas of the owner referral operation are Lead Gathering, Referral Contact, Vacation Sales, Tour Booking and owner statements. This is a discussion of how the process works.

1.2.1 Lead Gathering

Leads can be gathered through various methods. Each method is marked with a "Lead Source" which allows Magna to generate reports that track performance of lead gathering operations. Example lead gathering activities are "Point of Sale" leads gathered at the time of timeshare contract sales. Owner mail-outs that promote the program will generate mail leads. Owner services functions where service reps call owners at home and gather leads by personal contact.

Each method of lead entry has some key features. Each entry is logged in a notes file that logs the employee number (each person using the system must have an employee record), date, time, module it was entered in, call time and the action that was performed such as adding a lead, vacation or money or the updating of records. In addition these key fields are needed: Customer Service Rep (the person being credited with the lead, distinct from the person who get's them to tour), Telemarketing Office (location where the lead was gathered), Lead Source, Entry date, Call Back Date (if filled in it is the date they are being triggered to be called), Solicitor (if filled in the solicitor who is responsible to call) and the general contact information. I suggest that the minimum contact information is name(s) and phone number. With strong recommendation of Zip/Postal code and e-mail address. This system handles all of this information.

1.2.1.1 System usage examples of lead gathering

- Point of Sale
- Mail-outs or E-mail
- Phone Contact

1.2.2 Lead Contact

Lead now become part of the main body of leads available on the system. There is a difference in that each of these leads are marked with the contract number of the original owner.

1.2.3 Vacation Sales

See the telemarketing area for this information

1.2.4 Tour Booking

Same as telemarketing tour booking except that the sales rep will be the original sales rep that toured the referring owner if they have not been terminated.

1.2.5 Owner Statements

Owner statements can be in summary fashion or detailed for one owner. They print the number of referrals, those that have been contacted, toured and sold.

There is a monthly report that tells how many referrals each owner has had who toured and what number of referrals this set of tours are.

