
Purpose

MAGNAware Owner Referral Software will manage the contact you have with your owner base while collecting basic response information for the purpose of collecting leads. These leads are referred to as referrals when referencing leads supplied by owners.

The software then assists you in managing the contacts with the collected referrals and allows you to monitor the success of booking, touring and selling these leads by owner, lead source, and tele-solicitor.

MAIN Owner Referral MENU	
>Owner Menu	<
New Referral	
Edit Referral	
Edit Tour Date	
Show screen	
Outbound Calls	
Manual Outbound Calls	
Terms & Conditions Rcvd	
CONFIRM VACATION	
HOTEL PAID AMOUNTS	
Report Menu	
Letters Menu	
Maintenance Menu	
CC Search	
UNIX Utility/Mail	
Room Usage Summary	

Flow of Information

- Collect leads from owners by numerous methods (lead sources)
- Typical lead sources are, Point of Sale, Outbound Calls and Inhouse solicitation during the owners occupancy.
- Owner Referral department personnel calling owners to solicit leads are referred to as Customer Service Reps or CSR's
- Outbound calls can be tracked through the owner services menu
- Any owner hostility or reluctance to furnish leads can be flagged through owner concern date, adding information to contact history (NOTES) and by forwarding email to the correct person to handle the problem
- Owner's association can handle all complaints then put the owner on a callback for the Owner Referral CSR to call for leads.
- A call list can be printed to reflect the contact status of available owner leads
- Owner status can be:
 - A - Active in the program
 - B - Bad information
 - N - Not interested in participating
 - C - In owner-concern
- Use owner concern screen for people who are dealing with the owner concern
- Resort management may now print owner concern reports to monitor owner satisfaction
- Referral leads can be called and the status of the lead can be categorized as:
 - R - Raw not contacted lead
 - A - Actively being contacted to tour, may be in callback status or send information status
 - B - Bad information, either phone number or address
 - N - Not interested in participating

This section deals with the procurement of leads from owners. Additionally it allows restriction of access to owners who may be upset, hostile or otherwise being handled by the owners association. This is an important section. MAGNA strongly recommends that you monitor and use owner concern status to improve your relationship with your owners.

Owner Services Screen

Use this screen to interview and contact existing owners who may have already used one week in the life of their contract. Other lead sources such as procurement of leads at time of sale may be better entered through add new referral.

From the "Find By:" menu select a contract to work with. This is usually due to an inbound call, response to a mail survey or dialing from the call list.

The first time you work with an owner the system will ask if you wish to create the Owner Referral contact record. Usually you will respond with a yes unless you have pulled up the contract by mistake.

The important fields to fill in are contact date, CSR (your name or the name of the person handling this account), # of contacts, call back date, concern date, concern release date, recommend tour and status.

If you owner has a problem that needs to be handled they should be placed in owner concern by typing in today's date in the owner concern field. This will prevent you from entering leads and flag the owner's association to handle the problem. Upon saving the record you will be prompted to send mail to the correct terminal regarding the problem.

If the owner is happy and would like to give referrals answer Y to the recommend tour question, make sure the owner concern date is blank or that there is a resolution date for it. The status of the account must be "A". Upon pressing F2 when completed the enter new referral screen will appear and the referrals can be entered. If you are going to call these people make sure you get a phone number, if you are going to mail make sure you get the complete address, preferably get both. These referrals will now show up in the leads section of the software.

At any time during this session you may and/or should press F6-NOTES to record any relevant conversation for a contract history. Other department may then have the benefit of anything the owner may have said.

Bad phone numbers should be recorded as a B status so that further attempts are not made with this owner. Some kind of other contact should be attempted to correct it so that this owner may be activated. All changes from other departments such as contract processing will be reflected on the screen the next time this owner is pulled up.

Owner who are not interested can have a status of N and the system will not prompt you for new referrals. These owners will not come up on the call list.

Owner Concern Screen

See the instruction for Owner Services Screen. This screen is primarily for those who are handling problems and need to update the owner concern resolution and status field.

Additionally the owners association may know of a problem or do not want the owner referral department calling certain owners, they would then enter an owner concern date and a status of C in this screen.

CSR Screen	EDIT	Sys:06/21/2000 4:05PM cecilia
Sales Person: 1612 DeLeon		CONTRACT#: 7589
Evelyn Skinner 8036990551		OtherK#: 0
Albert Skinner		STATUS: F
212 Grinders Mill Road	1851F / 33	WRITTEN: 04/11/2000
Columbia SC 29223	/ 0	FULLDOWN:
	/ 0	Act Note:

Contract# 7589	Last Called: 03/28/2000	Times Called: 2
CSR REP # 1940 Support	Call Back : 03/29/2000	RefLastCnct:

USAGE:	Last Usage method:
# of times used 0	Home? <input type="checkbox"/> Loan? <input type="checkbox"/> SelfRent? <input type="checkbox"/> Clarion? <input type="checkbox"/>

Exchange:	Plsd w/	Was	Resort
USE II? <input type="checkbox"/>	Where _____	Process? <input type="checkbox"/>	ResortOK? <input type="checkbox"/> Name _____
Comment	Housekeeping supervisor notified _____		

Satisfaction:	Owner Concern/In/Release
Pleased? <input type="checkbox"/>	03/28/20 03/28/20 Unit wasn't clean when they arrived _____
Reason for Purchase:	_____
Return Survey? <input type="checkbox"/>	Recomend Tour? <input type="checkbox"/> Status C

Owner Services Reports

(Documentation for reports are under development)

OWNER REFERRAL / TLMKTING REPORTS

>Referral List (Entered Date) <
Referral List
Referral List (Card Info)
Referral Summary (Entered Date) CSR
Referral Summary (Entered Date) LEAD SRC
Call Back List
Call List (not called/callback)
Call List (not called/callback) EMP0
Vacation Arrival List
Bookings for the Day
Bookings for Hotels
Booked Vacations by Solicitor
Tour Arrival List MENU
Lead Inventory by Status Group
Lead Inventory by Lead Source
Cancellations
Vacation Arrival Summary
Vacation Arrical No Detail

Outbound Calls

Selection criteria for outbound calls in order of priority.

Table II Order of precedence to select outbound leads

Only Leads without booking dates and last attempt dates prior to today are selected for calling.

Status	Callback	Solicitor
A	Today or prior	Current Employee
R	Today or prior	Current Employee
H	Today or prior	Current Employee
A	Blank	No Solicitor or terminated
R	Blank	No solicitor or terminated
H	Blank	No solicitor or terminated
C	Today or Prior	Any

Current Employee = Current Employee number of user using the system

Action	# Times Called	Set Solicitor #	Booking, Send Info or CXL Date	Call Back Date	Last Contact Date	Last Attempt Date	Status
Book	YES	YES	Book	??	YES		A
Confirm	YES	YES Confirmed	NO	NO	YES	NO	A
Send Information	YES	YES	Send Info Date	YES	YES	NO	A
Call Back	YES	YES		YES	YES	NO	A
No Answer	NO	YES	NO		NO	YES	H
Bad Info	NO	YES	NO		NO	YES	B
Not Interested	YES	YES	NO	???	YES	NO	N
Cancel Vacation	YES	YES/Confirmed	CXL	???	YES	NO	C