

Straight to the Point: How to find and fix incentive points

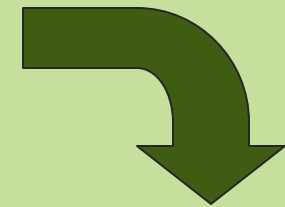
Presented by: Connections Project Managers

Lindsay Isbell - Alison Lounsbury - Stephen Shivers

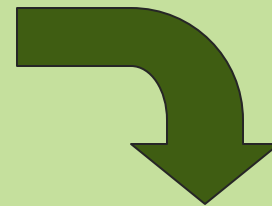
Overview



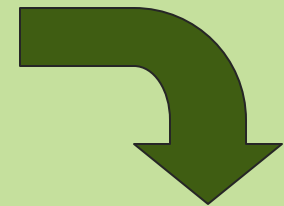
Common
Causes



**Finding
the Cause
in
Connections**



**Fixing the
Issues**



**Questions
& Answers**

Incentive Plan Set-Up



Connections by Marketing Solutions, Inc. - Windows Internet Explorer

https://connections.marketingsolutionsinc.com/admin/plans.php?expand=plans

File Edit View Favorites Tools Help

Google Search Share Sidewiki Check Translate Sign In

Connections by Marketing Solutions, Inc.

Inactivity logout in: 4 hr(s)
System Status

ADMIN FUNCTIONS

- Address Handling
- Administration Reports
- Custom Call Logging
- Custom History Events
- Data Review
- Data Mapping Report
- Documents
- Edit Style
- Employees
- Graph Ranges
- Help Info
- Household Custom Fields
- Household Value Index
- Incentive Plans
 - Setup Incentive Users
 - Recommendations
 - Incentive Plan Definitions
 - Audit Report/Process
 - Manually Add Points
 - Manually Withdraw Points
 - Payroll Report
- Information Pages
- Institution Info
- Locations
- Marketing Settings
- Manual Householding
- Products
- Prospect Settings
- Prospect Uploads
- Recommended Services
- Relationship Codes
- Security

ABC Bank Incentive Plans

Accounts only award once:

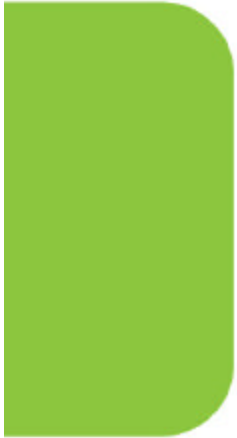
Measurement Period:

[Click Here](#) to create a new Incentive Plan

Incentive Plan	Action
	Edit Delete
	Edit Delete

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Trusted sites 100%



Common Causes

Common causes for points not posting



- Employee is not assigned to an incentive plan

Incentive Plan Users - Windows Internet Explorer

https://connections.marketingsolutionsinc.com/admin/incentive_users.php?expand=plans

File Edit View Favorites Tools Help

Google Search

Incentive Plan Users

ADMIN FUNCTIONS

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- Institution Info

Connections

Name

Incentive Plan Users

ABC Federal Incentive Plan

Allison Sprouse
Brad Meacham
Elizabeth Rice
Guest User
Inactive Employee

Add >>
<< Remove

Allie White
Andrea Mathews
Annie Wallace
Bobby Jones
Bo Stewart

Update

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TIP: You can add multiple employees to a plan using "Setup Incentive User" or singly under Employee Profile.

FIX: If audit report reveals "no matching incentive plan" check to see if employee has a plan.

Common causes for points not posting



- Service set to expire after “0” days

Service	Number of days to watch a recommendation for account open before expiring	Number of days to watch for successful referral confirmation before expiring
ATM Card	<input type="text" value="30"/>	<input type="text"/>
Auto Loans	<input type="text" value="0"/>	<input type="text"/>
Bill Payment	<input type="text" value="30"/>	<input type="text"/>
Business Checking	<input type="text" value="0"/>	<input type="text"/>
Business Loans	<input type="text" value="0"/>	<input type="text"/>
Cash Management	<input type="text" value="30"/>	<input type="text"/>
CD	<input type="text" value="30"/>	<input type="text"/>

Save

A value of 0 immediately expires prospects, a blank value never expires prospects.

TIP:

0 days = 0 points

FIX:

Change to “blank”
or X days
in order for
points to
post correctly.

Common causes for points not posting



Service or Product Not in the Plan

Plan Name:

Current Measurement Time Frame - 1 Month(s)

[Referrals](#) | [Recommendations](#) | [Product Combinations](#) | [Sessions](#) | [Performance](#) | [Payment](#) | [Overall Goal](#)

Referral Points			
Product	Points for customer	Points for non-customer	Pr
ATM Card (Service)	2	2	
Bill Payment (Service)	2	2	
Cash Management (Service)	1	1	
Deposit (Class)	5	5	
Loan (Class)	15	15	

Referral Overall Goals:

TIP: Verify if service should be included in plan.

FIX: Add Service as needed.



Common causes for points not posting

Account Open Date – Prior Month

Referral Points Add/Edit - Windows Internet Explorer

CONNECTIONS

Referral Points Add/Edit

Product: Service - Checking
Points awarded by: Successful prospect close
Points award date: Account is Opened
Points for member: Referral is Confirmed
Points for non-member: Referral is Made
Points paid to closing employee: Yes
Closing employee's points for member: 1
Closing employee's points for non-member: 1

Product Level Goals

Save Cancel

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Close

TIP: Note the Award by method & date. This determines when the points will post.

FIX: Select Successful prospect close date so points post in current month.

Common causes for points not posting

Referrals not confirmed




Confirm Referral - Windows Internet Explorer

CONNECTIONS

Confirm Referral

DANIEL R. SMITH was referred to you by Bobby Jones. Please confirm or deny the referral.

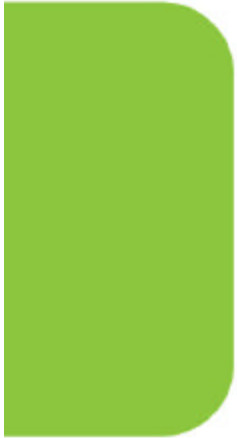
Notes:


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TIP: Employee needs to select either confirm for points to post or deny if points should not be awarded for each referral.

FIX: Not getting the confirm referral window? Verify that the pop-up blocker is turned off.



Finding the Cause

Finding the Cause



- Did the employee enter the individual as a referral/recommendation?
- Probe for more information.
 - What is the prospect's name?
 - What was referred/recommended?
 - To whom was it referred?
- Be familiar with the incentive plans.
 - What services/products are included in the plan?
 - What plan is the employee assigned?
- Pay attention to the dates
 - Award Date
 - Post Date
 - Account Open Date





Date Type:

Start Date: End Date:

Report By: Filter:

Display

[Referrals Awarded](#) | [Recommendations Awarded](#) | [Session Points](#) | [Bonus Points](#)
[Failed Referrals](#) | [Failed Recommendations](#) | [Possible Open Matches](#)
[Current Pending](#) | [Open Referrals](#) | [Open Recommendations](#) | [Manual Adjustments](#)

Failed Recommendations - 04/1/2010 - 05/05/2010			
Failed Date	Post Date	Employee	Detail
04/17/2010	04/17/2010	F [REDACTED]	Recommended Internet Banking to VINCENT JAMES Prospect closed with no incentive plan match
04/17/2010	04/17/2010	J [REDACTED]	Recommended Savings to BETTY CROCKER Prospect closed unsuccessfully
04/17/2010	04/17/2010	F [REDACTED]	Recommended Boat Loan to BONNIE BELL Prospect closed unsuccessfully

TIP: Audit Report:
Use the filters to
narrow down your
search. Expand
the date range as
needed.

FIX: Note the
reason it fails &
follow the flowchart
to correct the error.

Update

Audit Report: Failed Recommendations



- Prospect closed unsuccessfully
- Prospect closed with no incentive plan match
- Recommendation expired with no match.
- Expired after X days. Account match found, but “prospect open” date exceed X days from prospect start date.
- Expired after X days. No account match found





[Referrals Awarded](#) | [Recommendations Awarded](#) | [Session Points](#) | [Bonus Points](#)
[Failed Referrals](#) | [Failed Recommendations](#) | [Possible Open Matches](#)
[Current Pending](#) | [Open Referrals](#) | [Open Recommendations](#) | [Manual Adjustments](#)

Referrals Denied - 04/1/2010 - 05/06/2010				
Denied Date	Post Date	Employee	Detail	Denied By
04/01/2010	04/01/2010	Paul	Referral of SAVINGS PLEDGE – Not Fully Secured to LIANE SMITH on 04/01/2010 Denied: prospect closed unsuccessfully and no matching incentive record	
04/01/2010	04/01/2010	Adrienne	Referral of Checking to STACY LONDON on 01/14/2010 Denied: Prospect closed unsuccessfully.	Paul
04/15/2010	04/15/2010	Lindsay	Referral of Credit Cards to KEVIN JONES on 04/13/2010 Denied: Prospect closed unsuccessfully.	

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TIP: Audit Report:
Use the filters to narrow down your search. Expand the date range as needed.

FIX: Note the
reason it fails &
follow the flowchart
to correct the error.

Audit Report: Failed Referrals

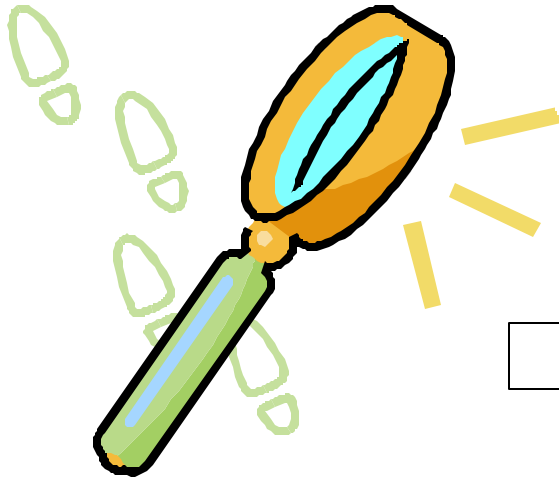


Denied Reasons:

- **prospect closed unsuccessfully and no matching incentive record.**
- **Prospect closed unsuccessfully.**
- **No matching incentive plan record**
- **Same member/customer referral - duplicate and Denied: No matching incentive plan record**
- **Referral already confirmed for account type**
- **Open record for the account has already been audited.**
- **Note from Prospect confirmation.**



Failed Referrals/Recommendations



Prospect closed
unsuccessfully

Was the Referral denied by
an employee?

Yes.

No, go to Admin functions → Incentive
→ recommended services.

Is the "days to
expire" set to '0'?

No, go to
history tab.

Does the open date
exceed past the "days
to expire"?

YES, then points will
not be awarded.

No, check prospect
outcome.

Outcomes: not interested, loan denied, or
your custom field making prospect
"inactive."

Your discretion to manually add points.

Failed Referrals/Recommendations

No matching
Incentive Plan

Is employee assigned to a plan?

No, points not
awarded.

Yes, Verify that service
product is in incentive
plan.

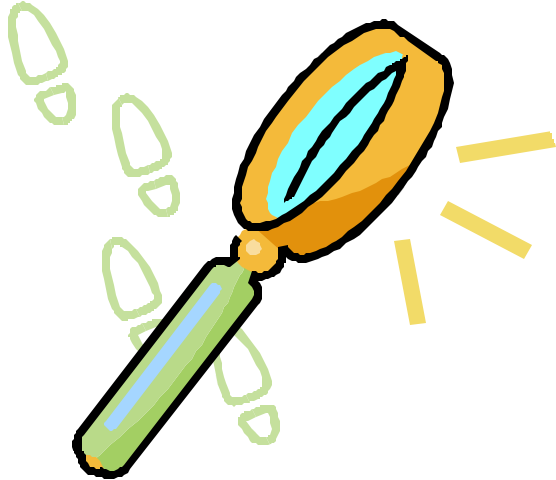
No, assign plan to
employee in employee
profile .

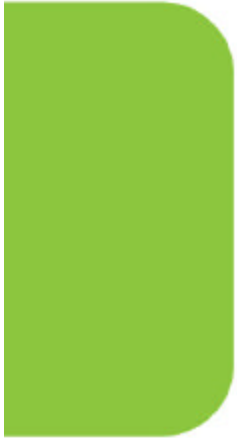
Yes, verify if referred
on product or service
level.

Not on the plan, no
points will be
awarded.

Product Level- No, matching
incentive plan is correct.

Your discretion to manually add points.





Fixing the Issue

Start from the Source

Employees can help you by...

- Reviewing the incentive plan – MY INFO – INCENTIVE PLAN
- Noting which points are missing – MY INFO— PERFORMANCE
- IDENTIFYING THE AWARD DATE



Employee Information - Windows Internet Explorer

Product	Referring Employee		Working Employee		Product Goal
	customers	non-customers	customers	non-customers	
Business Manager	1	1	0	0	
Insurance-Business	1	1	0	0	
Insurance-Personal	1	1	0	0	
Investment-Personal	1	1	0	0	
Investments-Business	1	1	0	0	
Loan	1	1	0	0	
New Employee Referral	1	1	0	0	

Points that can be earned for new account recommendations/working prospects

Product and Criteria	Points for customers	Points for non-customers	Product Goal
Ancillary	1	1	
Deposit	1	1	
New Employee Referral 90-90 days open and household has Personal Checking	1	1	

Points that can be earned for new accounts sessions

- 0 - Points awarded to the new account opening employee for each account sold in a session (not counting the first).
- 0 - Points awarded to the new account opening employee for each ancillary service sold in a session (for all accounts).

Points that can be earned based on performance goals

Goal	Points
Incentive Plan Goals	
• Goal for session cross-sell points: 0 points each measurement period.	

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Close

Employee Performance Summary



Employee Performance Report - Windows Internet Explorer

https://connections.marketingclubonline.com/auth/employeeperformance.php?reportby=3&startdate=02%2F1%2F2010&enddate=03%2F18%2F2010&dateType=1&filter=2&myinfo=0&hidezero=0&expand=2

CONNECTIONS

Employee Performance Report

Start Date: 02/1/2010 End Date: 03/18/2010
 Report By: Location Filter: Main Date Type: Awarded Date:
☐ Hide 0 point records. **

Display

Location	Referrals			Pending *	Recommendations			Product Combinations		Session	Manual	Bonus	Total
	Payable	Not Payable	% To Goal		Payable	Not Payable	% To Goal	Payable	Not Payable				
Main <=>	0	0	0.00% (48)	0	0	0	0.00% (80)	0					
Bobby Jones	0	0	0.00% (12)	0	0	0	0.00% (20)	0					
Bo Stewart	0	0	0.00% (12)	0	0	0	0.00% (20)	0					
Joshua Dennis	0	0	0.00% (12)	0	0	0	0.00% (20)	0					
T. Leon Eli	0	0	0.00% (12)	0	0	0	0.00% (20)	0					
Totals	0	0	0.00% (228)	0	0	0	0.00% (380)	0					

* - Pending points are the current total, not for the selected time period.
 ** - Goals in total and subtotal rows may contain data for employees not displayed.

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[Close](#)

TIP: You can hide 0 points so that you are only viewing employees who have been awarded.

TIP: Note points in current month. Then change “start date” to one month prior. Keep the end date the same. Did the number of payable increase? If yes, then the points were awarded in the previous month.

FIX: May need to adjust the points award by and and/or award date in incentive plan.

Employee Performance Detail



Employee Performance Detail - Windows Internet Explorer

https://connections.marketingsolutionsinc.com/auth/performancesummary.php?startdate=04%2F1%2F2005&enddate=04%2F08%2F2010&view=8&datatype=1&reportby=1&filter=10&detail=28&

CONNECTIONS

Employee Performance Detail

TIP: change the level to detail to get specific details on the referral/recommendation.

Start Date: 04/1/2005 End Date: 04/08/2010
View: All Date Type: Award Date
Report By: Employee Filter: Allie White
Detail Level: Detail

Display

TIP: Manually add points to employees. Make sure the post date is in current month.

Employee: Allie White

Awarded To	Award Date	Detail	Points
Allie White	10/16/2005	Referred JASON COOVER to for CD Confirmed CD on 03/03/2004.	5
Allie White	Referred - CD		5 0 5
Allie White	10/16/2005	Referred ANDREA JENKINS to for Personal Loan Confirmed Personal Loan on 03/03/2004.	15
Allie White	Referred - Personal Loan		15 0 15
Referral Totals:			20 0 20
Referral % To Goal			5.46% (366)
Allie White	04/08/2010	Customer Service For CD	10.00
Allie White	Manual Points		0 0 10
Manual Point Totals:			10 0 10
Total Points:			30 0 30
Total Current Payable Points:			30

Adding or Withdrawing Points



• Adding Points / Withdrawing Points

- You can add notes to show why the points were added or withdrawn.
- You select the date and product associated with the change.
- Changes made here are applied to the incentive plan reports in MYP.

CONNECTIONS

Add Points

Employee: Bobby Jones

Total Points Payable: 4

Total Pending Points: 0

Un-Payable Points (Last measurement period): 0

Un-Payable Points (This measurement period): 0

Number of Points to Add:

Post Points On: mm/dd/yyyy

Points Added for:

Optional Product:

CONNECTIONS

Withdraw Points

Employee: Bobby Jones

Points Payable: 4

Pending Points: 0

Un-Payable Points (Last measurement period): 0

Un-Payable Points (This measurement period): 0

Number of Points to Withdraw:

Post Points On: mm/dd/yyyy

Reason for Point Withdrawal:


Optional Product:

Incentive Plan Summary



Performance Report - Windows Internet Explorer
 https://connections.marketingsoftwareinc.com/auth/performance-report.php?startdate=02%2F1%2F2010&enddate=03%2F18%2F2010&reportby=1&filter1=&reportby2=&filter2=&displaytype=1&viewtype=

CONNECTIONS



TIP: Lists all of the products/services part of the plan(s)


Start Date: 02/1/2010 End Date: 03/18/2010
 Report By: Employee Filter: All
 Report By 2: Filter: All
 Display: Points View Type: All
☐ Hide 0 point records. *

Display

	Referrals					Total	% To Goal	Recommendations					Total	% To Goal
	All Goals	BA Flyers	Cash Rewards	Deposit	Loan			All Goals	Business Loans	CD	IRA	Referrals		
Allie White						0	0.00% (12)						0	0.00% (20)
Allison Sprouse						0	0.00% (0)						0	0.00% (0)
Andrea Mathews						0	0.00% (12)						0	0.00% (20)
Bobby Jones						0	0.00% (12)						0	0.00% (20)
Bo Stewart						0	0.00% (12)						0	0.00% (20)
Brad Meacham						0	0.00% (0)						0	0.00% (0)
Cindy L. Auper						0	0.00% (12)						0	0.00% (20)
Elizabeth Rice						0	0.00% (0)						0	0.00% (0)

* - Goals in subtotal rows may contain data for employees not displayed.

Print Export to Excel


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Close

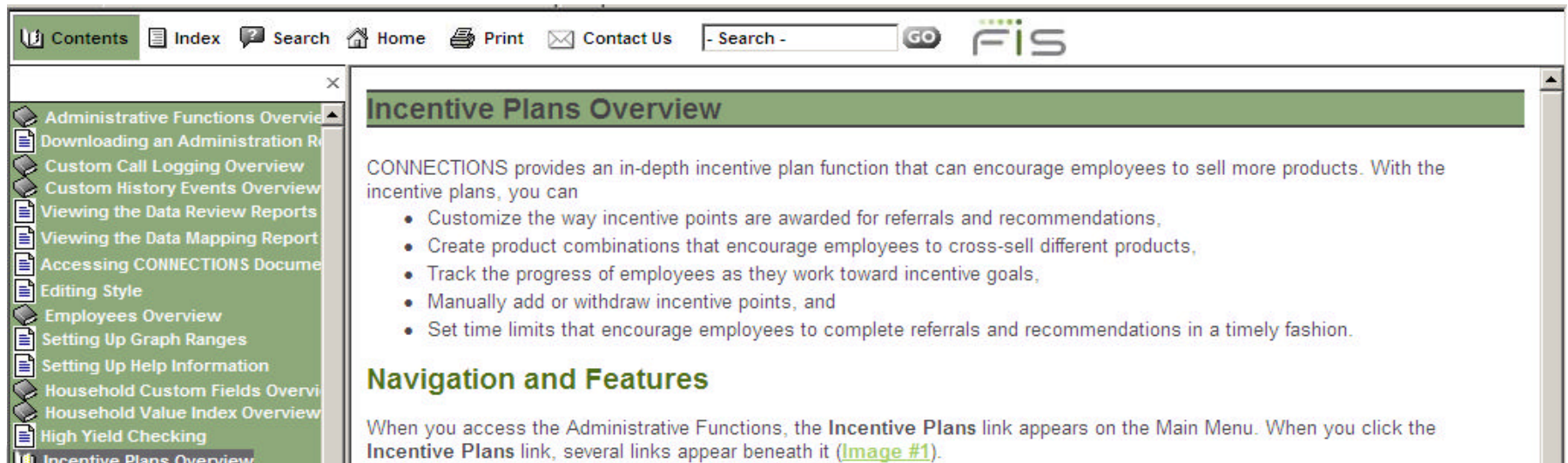
TIP: Use this report to review the services/products listed in incentive plans. It listed ALL the services/products in ALL the plans.

FIX: If you are missing a service/product add it to the incentive plan.

When your search hits a roadblock:



- Go to Connections on-line help.
 - Located under User Function
 - Search on Incentive Plan
- Call Customer Support (800) 888-4327 option 6, 2
 - Name of individual
 - Audit Report Denied message
 - Verify that you see the account open date or service added on the history tab.
 - When the point should have been awarded.



Audit Reports – Tips to Remember



- **ALWAYS** begin your troubleshooting with the audit reports.
 - Look for the warnings to try and troubleshoot.
- **ALWAYS** make sure you are viewing the correct date range.
 - Posted Date
 - Awarded Date

