



# THE ULTIMATE CUSTOMER CARE PROGRAMME

Designed for  
Wealth Management and  
Independent Financial Advisors

*Whether you are an IFA working as a sole proprietor, or operating a larger practice of several advisers, you will need to be aware of CCP's new and innovative system, designed specifically for wealth management. It will provide peace of mind, by ensuring that all of your clients and prospects are serviced in a timely, effective and efficient manner*

Meeting the expectation levels of an ever growing portfolio of clients and prospects, often leads to pressure and stress that will negatively impact on your ability to provide a quality and comprehensive service. These commonly experienced pressures all too often result in clients migrating to competitors.

CCP's latest Client Care Programme, was developed using the vast experience and expertise of one of the top wealth management firms in the City, where quality of service is paramount.

CCP always ensures that your clients, old, existing, or new, will always be reliably managed, keeping you and your clients fully informed by email or telephone. Ensuring they are appropriately marketed is vital with the ever growing number of hungry competitors. You will never again miss out on a renewal again.

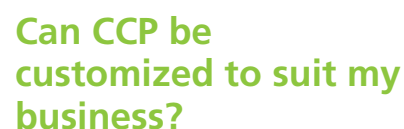
The system is fully integrated with telephony, call recording, email and document storage which enables you to ensure your portfolio remain accurately informed of your ongoing services, as well as all the latest products that you may wish to promote.

The most advanced inbound call handling module, Reception, will have your calls answered by a person and greeted by name, and your assigned teleagents are able to update your clients on the progress of their case. Reception relieves the relentless pressure of having to take large volumes of calls and dealing with voicemails, and texts, leaving you free to focus on the meetings in hand.

The comfort of knowing that your valued clients are being dealt with in a professional and compliant manner, with a point of contact at all times make running your business for more pleasurable and effective by relieving you of the increasing demand on your time.

Let CCP demonstrate a professional image, which in turn will generate referrals and create many more sales opportunities while freeing up more time for the important things in life, family, friends and more leisure time.

**Read on to take advantage of this new innovative service, that really is simple quick and easy to get started.**



CCP provides a comprehensive CRM structure, but you are able to quickly and seamlessly customize it to suit your own preference and style. As your business develops, you can adapt it to keep pace with changes, keeping it all fresh and new. You are able to add other users with very 'fine grained' permission and access levels, and allow your clients and prospects to see the information you hold on them, so you are fully GDPR compliant at all times.

Once your client/prospect list is loaded into the secure CRM, you are able to populate the CRM with all the important renewal dates. You are able to select how far in advance you need the notifications, and whether the client should be notified as well. The notifications will arrive by email but will also appear on your daily task schedule. You are able to deal with it then, or maybe re-schedule it for another time. Either way CCP will not allow you to forget.



Message Box

My Profile

Reception

Leadgen

Survey

Appointments

CRM

Admin

Hub: CCP Central

Hello: Demo IFA (Demo - Default IFA)

Login 10:40 | User 93 00 19 | Logout

Scheduled Calls/Tasks

10 schedules found

Record ID	Date	Contact	Reason	Status	Schedule Date	Campaign	Adgroups	Notes
(*)	Fr: 03/05/2018 To: 10/10/2018	(Remove contacts)	(*)	Any	(*)	Any		Find
790767	03/09/2018	Storlien, Lylin	Call - Reminder	Call back Reqst	07/09/2018 10:40	Demo - Default IFA Daily CallTask	0	Go
790772	03/09/2018	Carr, Michelle	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790768	03/09/2018	Dionisio, Nicholas	Call - Reminder	Call back Reqst	07/09/2018 11:10	Demo - Default IFA Daily CallTask	0	Go
790774	04/09/2018	Carpel, Neil	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790769	05/09/2018	Devell, Russell	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790772	06/09/2018	Orsi, Karen	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790773	10/09/2018	Adams, Andrew	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790740	10/09/2018	Anderson, Robert	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790763	10/09/2018	Reynolds, Scott	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go
790771	10/09/2018	Carpel, Neil	Call - Reminder	Pending		Demo - Default IFA Daily CallTask	0	Go

Use Advanced Search to schedule new calltasks



## Can CCP help me with appointments

Yes it will. The CCP inbuilt Contact Centre function allows to operate your own lead and appointment generation. Just select the teleagents that you prefer from the Resource Centre and you are able to generate appointments at your required pace and budget. There are two appointing systems in CCP, designed to suit every type of IFA or Wealth Management operation. Whether the appointments are face to face, telephone, or Skype, CCP will organise your appointments and send timely reminders to you and your prospect.

Campaign	Date/Time	Rep	Contact	Product	Action	Status	Notes	Booked
Dem - Default IFA	24/09/2018 12:00:00	PA, Demo	Anderson, Robert	TW11 1QW	Phone	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 13:30:00	PA, Demo	Dickson, Norman	TW11 2QW	Phone	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 15:00:00	PA, Demo	Dee, Anne	TW11 3QW	Email	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 16:45:00	PA, Demo	Blayden, Lynn	TW11 4QW	Phone	Follow-up Sent		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 18:00:00	PA, Demo	Dee, Anne	TW11 5QW	See contact	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 19:45:00	PA, Demo	Blayden, Lynn	TW11 6QW	Phone	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 20:00:00	PA, Demo	Dee, Anne	TW11 7QW	Phone	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 20:30:00	PA, Demo	Blayden, Lynn	TW11 8QW	Phone	Pending		<input type="checkbox"/>
Dem - Default IFA	24/09/2018 21:00:00	PA, Demo	Dee, Anne	TW11 9QW	Phone	Pending		<input type="checkbox"/>

## Will CCP help with all my incoming calls?

CCP has a Reception module which is bespoke to your business. You are able to have your clients and prospects greeted by name, and have the call handled or redirected as you choose.

The teleagents are also able to pass information messages to the caller, to keep them fully informed. You are able to filter and prioritize your incoming calls and keep your active clients up to date at all times. All calls are recorded with instant replay, so there is no need to worry about the ambiguity of transcripts. Reception allows you to focus on the job in hand without the stress of constant and unnecessary interruptions.

Del	Surname	Forename	Title	Tel No	Business	Call Screening Instruction
Dem - Default IFA	Anderson	Robert	Mr	08436484550	Workings	Transfer To Work Number
Dem - Default IFA	Blayden	Lynn	Ms	08436484550	Titanium Enterprises Ltd	Transfer To Work Number
Dem - Default IFA	Dee	Anne	Ms	08436484550	Minimex	Transfer To Work/Home/Alt Number
Dem - Default IFA	Blayden	Lynn	Ms	08436484550	Smart Entertainment Ltd	Take Message Only
Dem - Default IFA	Dee	Anne	Ms	08436484550	Heartpoint Ltd	Transfer To Work Number
Dem - Default IFA	Dickson	Norman	Dr	08436484550	Bearings	Ask Norman To E-mail RD1 Documents To Me



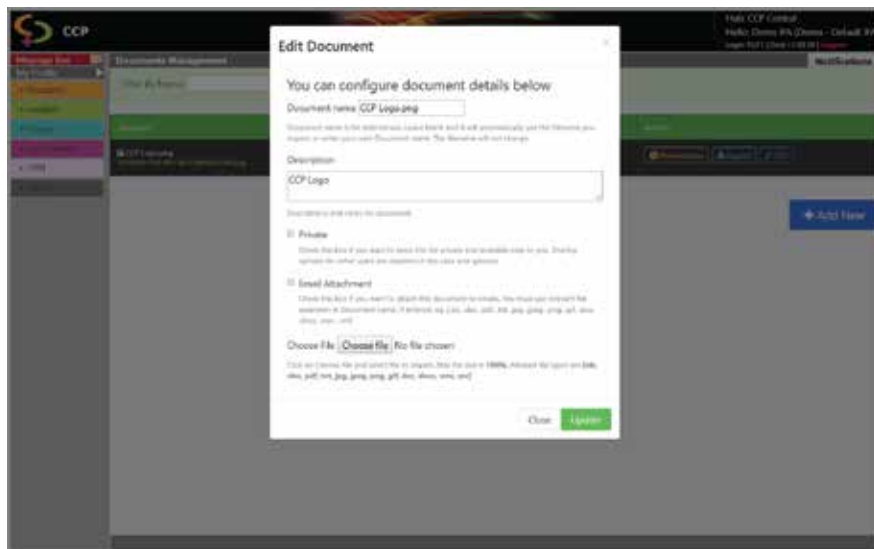


## Is CCP able to generate new business for me?

There are several modules within CCP that will effectively and efficiently convert prospects to clients.

Effective marketing is simple really. It's all about talking to a lot of people many times to gather intelligence on their needs and preferences, and inform them of products or legislation that might be of benefit to them. It's all about building trust and rapport, and that takes a little time and patience. It cannot happen on the first point of contact, it takes several conversations. Once you have the intelligence, it's very likely that you will be able to provide all they need.

As you will always be busy dealing with active cases, you have no time for relationship building, but CCP will do all this for you, as much or as little as you choose, to fit your budgets and growth plans.



## I have many documents to file...can CCP help?

Within CCP there is a secure and very advanced document storage system, that allows you to store an unlimited number of files of any type.

It also has the usual CCP 'fine grained' access and permission controls, so you are able to allow clients to access the documents, or even edit, the forms or documents that you need them to. You are able to store brochures, product information and forms and attach them to the CCP Email system. Although the call recordings are always available on demand, you are also able to store call recordings along with germane documentation in the clients documents folder, and dictate exactly what the client is able to access or edit.

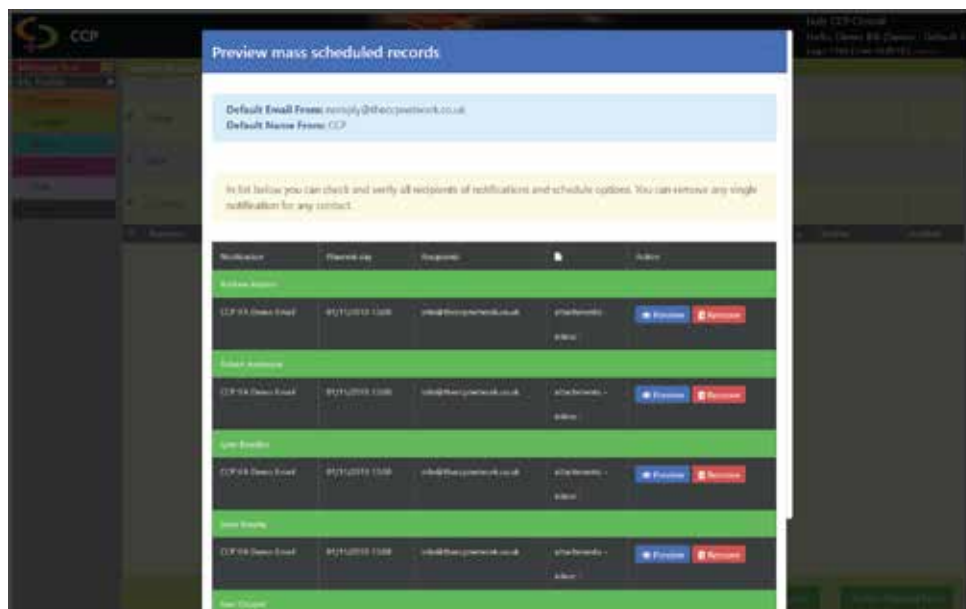




## I often need to contact individual or multiple clients by email.

Most often, emails to clients or prospects need to include information from the CRM that is specifically relevant to a particular client or prospect.

Whether the email is a communication to remind or advise a client, or a mass email to announce a new product or service, CCP will ensure that the contact is bespoke to that particular client, making it very personal and pertinent. Any series of documents from the library may be attached to both types of email, and there are no limits as to the number of emails per campaign. CCP will ensure that you keep in contact with your entire portfolio for the right reasons and at the right time. *Try it and see for yourself.*



## Do I get support if I need any help?

We provide all the assistance you will ever need. Some users choose to do everything themselves and others prefer to 'get on with the job' and have our team look after the CRM and the activities. Following your training you will get 3 months free assistance, and then you pay for support in increments of 10 minutes. We get a lot done in ten minutes so it's very cost effective if you are too busy. To get help you simply email 'support' with your request and we will call you within the hour to make sure we understand your instruction. Often we can do it while you are on the call.



## How long does it take to set up?

All we need is your company details and we will create your log in details. We are then able to import your clients and prospects data, ideally in Excel or .CSV format.

We will then set up your telephony to enable you to call clients and prospects from the CRM. All calls are recorded so you will enjoy the safety of communication accuracy. If you have the data ready you can be up and running with a couple of days.



## Can I keep my Client updated on progress?

Yes, there is a section called 'Case Progress' where you are able to record the progress and events chronologically. Each entry is date and time stamped, and shows the name of the person that made the entry. The system will send an email to advise the Client to log in to see the update. The Client is then able to see all the entries and expand to read the full text of each entry.



*CCP has been designed to help you maintain, manage and grow your business. Instead of ending the day with a huge headache, you will be able to relax and enjoy your home life, knowing that CCP will be ensuring that your clients get the attention they expect.*

*Keeping in touch with your prospects and clients will ensure that you get all of their business and that must mean more revenue per customer and reduce the cost of client attrition and acquisition. Do it better than the rest...use CCP.*

*Finally*

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