

Release Notes

InTouch Follow-Up v5.6

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1 Product Release Information

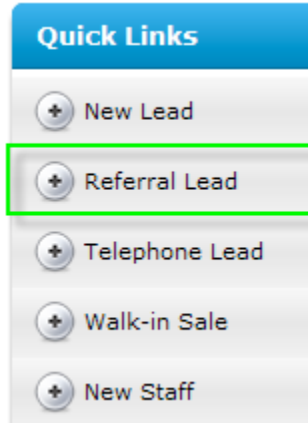
Product	InTouch Follow-Up
Release number	5.6
Release date/details	September 21, 2011 9pm PT Possible downtime of up to 30 min
Contact	For more information, please contact support@intouchfollowup.com

2 New Features

2.1 Referral Lead

Quick Links provides another way to create a specific type of Lead = Referral Lead.

This will tie this Lead to the referring Member (and vice versa) in multiple ways – including Reporting, see section 2.2.



Search for the referring Member - Select

Referral Lead

Search Member

	Kristy Jones	604-202-2457	-	Select
	Kristen Jantzen	-	-	Select
	Christine Twele	-	-	Select

Add Lead form **defaults Contact Method and Lead Source to Member Referral and also includes the referring member's name.**

Add Lead

First Name *

Last Name *

Phone Mobile

Email

* Either email or phone is required

Lead Owner Scott Johnston

Product Membership

Trial Membership

Contact Method Member Referral

Lead Source Member Referral

Referred by Paul Rand

Note

Actions
[Lead Details](#)

Remember to add a Mobile and Email so that InTouch Follow-Up can help you close more sales by automatically communicating with your leads.

Referral reference in Lead's History

Peter Miller

Call Created
 Type: No Club Visit: Day 1 Call
 Date: 20-Sep-2011
 With: Scott Johnston
 Status: Open
 Details:
 September 20, 2011 2:52 PM by System

Lead Created
 Product: Membership
 Owner: Scott Johnston
 Referred by: Paul Rand
 September 20, 2011 2:52 PM by Scott Johnston

Actions

- Member Referral
- Member Referral
- Email Ascot
- Outreach Corporate leads
- Walk-in Ascot
- Phone In APN on-line
- Text Message Ascot
- Telephone Inquiry Ascot

Enter note here

Referral reference in Member's History

Paul Rand

Lead Referral
 Product: Membership
 Referred: Peter Miller
 September 20, 2011 2:52 PM by Scott Johnston

Call Modified
 Status: changed from Open to Canceled
 Note: Canceled by the system as this call has not been closed within 7 day
 August 31, 2011 3:50 PM by System

2.2 Reports

2.2.1 Referrals

Great way to track (and reward) Members on their Referrals!

Calendar		Agenda		Leads		Members		Follow-Up		Reports		Admin	
Guest Log		Live Club Data		Live Reports		Email Reports		Lost Memberships					
Report Name	Report Description												
Lead Source Lead Report	Shows what lead sources are being effective											View Report	
Contact Methods for New Membership Leads Report	Shows Leads Created in the selected time frame and leads that were won out of them regardless of when they were won											View Report	
Membership Sales based on Contact Methods Report	Shows all Leads Won in the selected time frame regardless of created date											View Report	
Won Lead Export Report (CSV)	Export all the won leads for a date range to a CSV file											View Report	
Active Lead Export Report (CSV)	Export all leads (except won) for a date range to a CSV file											View Report	
Game Play - Lead Activity	Lists all your staff and reports on their sales activity by points											View Report	
Referral - Members Who Referred New Members	Lists each new member, how many referrals they gave and how many of their referrals have signed up											View Report	
Referral - Leads That Joined	Lists each referral who signed up, and how long it took to get them signed up											View Report	

2.2.1.1 Members Who Referred New Members

- Referrals Added in *September* = How many Referrals each Member supplied during the selected month
- *September* Referrals that Joined = How many Referrals added in the selected month joined
- Referrals from Previous Months that Joined = How many Referrals supplied in previous months joined in the selected month
- Total New Members = Total new members (from referrals) added in the selected month

Members Who Referred New Members

Club: QA Enterprise

Date: September 01, 2011 to September 30, 2011

Member	Referrals Added	New Referred Members	New Members From Past Referrals	Total New Members
Ann Jones	1	0	0	0
Bart Simpson	5	1	1	2
Fanny Mayer	2	0	0	0
Frank Long	1	0	0	0
Paul Rand	1	0	0	0
Simran Karthik	3	2	0	2
Test2 Test2	6	0	0	0
Total	19	3	3	4

2.2.1.2 Referral that Joined

Showing Referrals that have joined in the selected month and their **Sales Cycle** = duration from adding the Referral to the day they Joined.

Referrals That Joined

Club: QA Enterprise

Date: September 01, 2011 to September 30, 2011

Lead	Referral Added	Joined	Sales Cycle	Referred by
Barney Herring	September 18	September 18	0	Simran Karthik
Fred Flinstone	September 18	September 18	0	Simran Karthik
Krusty Clown	September 16	September 18	2	Bart Simpson

Total: 3 Average: 0.7

2.2.2 Game Play -Lead Activity

Each staff member's Sales Activities are ranked. Staff earn points based on the value of the Sales Activities they complete.

Calendar	Agenda	Leads	Members	Follow-Up	Reports	Admin
Guest Log	Live Club Data	Live Reports	Email Reports	Lost Memberships		
Report Name	Report Description					
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Game Play - Lead Activity	Lists all your staff and reports on their sales activity by points					View Report
Referral - Members Who Referred New Members	Lists each new member, how many referrals they gave and how many of their referrals have signed up					View Report
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Game Play - Lead Activity Report

Club: QA Enterprise

Month: September 2011

	0.2 Points	1.0 Points			2.0 Points			3.0 Points		5.0 Points	Total
	Calls (Left Message)	Calls (Spoke With)	Completed Tasks	Lead Created *	Outreach	Referral Lead	Scheduled Club Tour	Showed-Up Club Tours	Tour Now	Sold Lead	
Erin Dalzell	0.0	11.0	5.0	4.0	4.0	20.0	4.0	3.0	0.0	25.0	76.0
Scott Johnston	0.0	7.0	2.0	3.0	0.0	2.0	4.0	9.0	3.0	0.0	30.0
Club Total	0.0	18.0	7.0	7.0	4.0	22.0	8.0	12.0	3.0	25.0	106.0

* Only counts points for leads added by the staff (does not count points for new leads added from the web, Facebook or inbound mobile)

***Game Play Report Points Values:**

- Left Message = 0.2
- Spoke With = 1.0
- Tasks Completed = 1.0
- Lead Created = 1.0**
- Outreach Tasks Completed = 2.0
- Referral Lead = 2.0
- Scheduled Club Tour = 2.0
- Showed Up Tours = 3.0
- Tour Now = 3.0
- Sold Lead = 5.0

***Only awarded for Sales Activities**


**** Lead Points only for staff entered leads (no points for leads from: Web, Kiosk, Facebook or Mobile Marketing).**

3 Enhancements

3.1 HomePage

***Leads to be Assigned** shows number of incoming Leads from external sources

- Website
- Facebook
- Text

Leads To Be Assigned			
	Website	Facebook	Text
	26	0	0

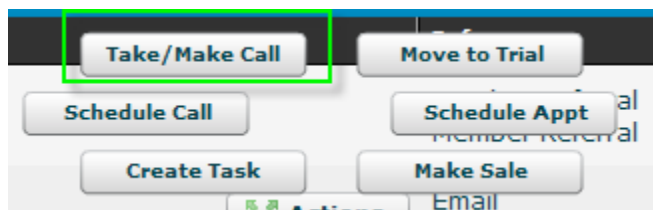
Please note: not all corporate websites allow integration and not all countries are currently set-up for Inbound Texting.

Please contact support@intouchfollowup.com to discuss these features and their implementation.

3.2 Action Button Options

Additional action options for Calls

- Take = Inbound
 - The ability take and track Inbound Calls
- Make =Outbound



Select *Inbound Call* and the History will reflect this Call Type.

Type Sales Call
Mobile (604) 202-2457
Home Phone
Work Phone

Inbound Call

Answered Left Message
Call Later

Contact

Scott Johnston

History Enter note here

Call Spoke With
Type: Inbound Call
Date: 21-Sep-2011
With: Scott Johnston
Status: Spoke With
Details:
September 21, 2011 10:13 AM by Scott Johnston

Call Modified
Status: changed from Open to Canceled
Note: Canceled by the system as this call has not been closed within 7 days
September 1, 2011 3:50 PM by System