Pinnacle CRM Guide

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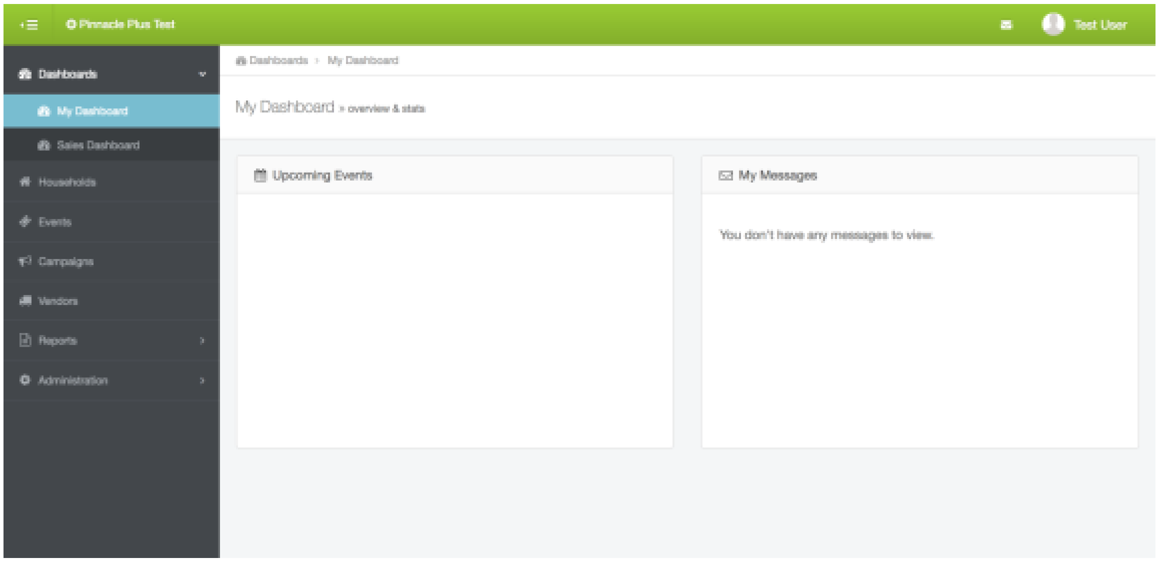
DASHBOARDS

The dashboards in the CRM allow you a generalized look at what is going on in the company.

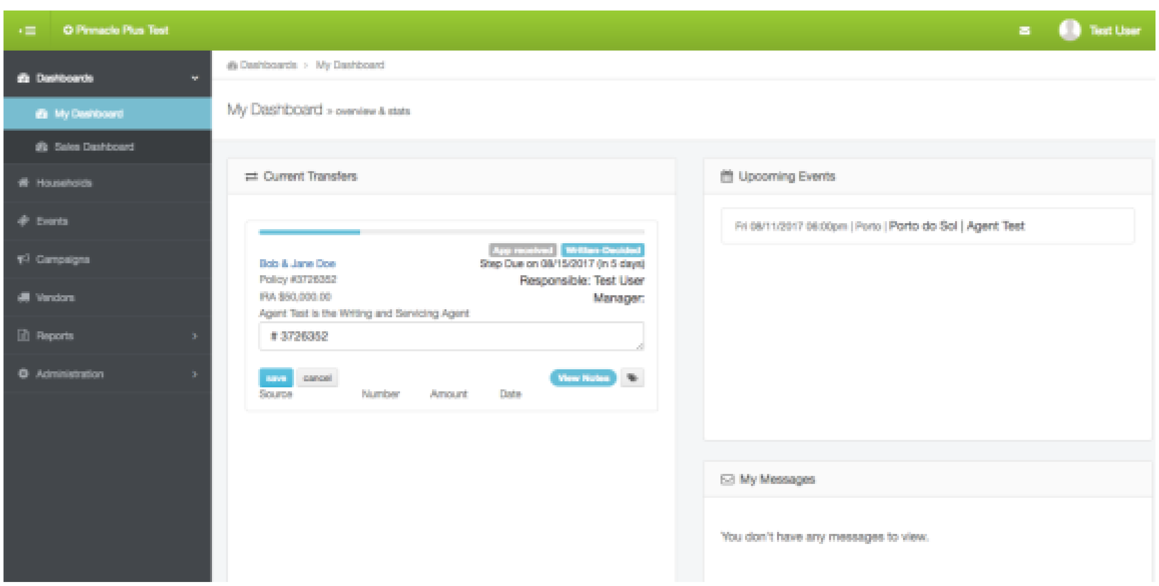
MY DASHBOARD

This dashboard looks different depending on the user.



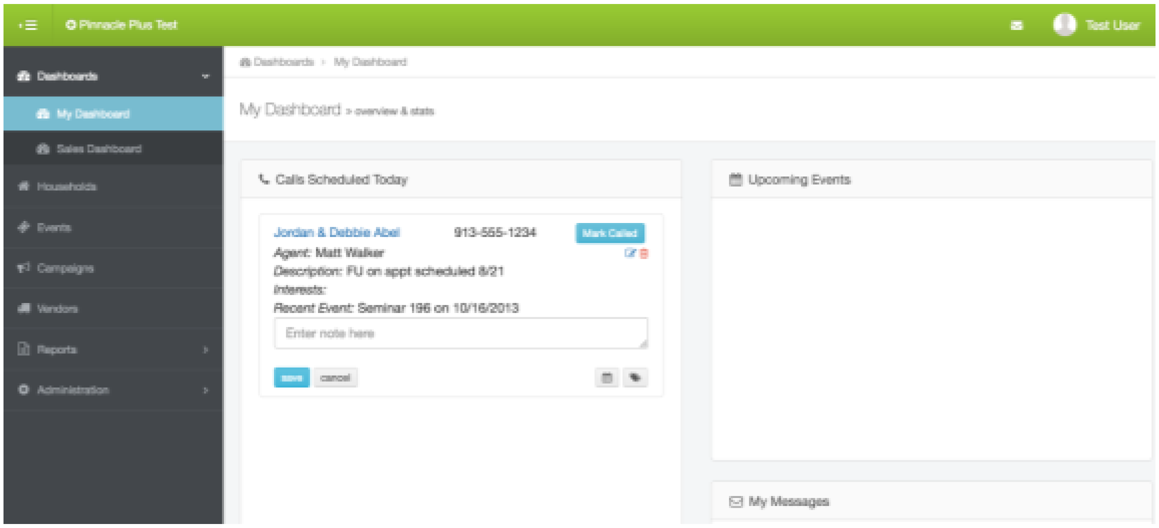
picture 1 Blank view of My Dashboard Page

The standard view includes two panels. On the left is a short listing of upcoming events in the next week. It lists the date, location, and agent in a clickable listing. The right panel has the messaging center, which is also visible from the dropdown of the mail icon from the header. This is currently used to send out updates on the CRM features. You can also send messages to other users in the CRM.



picture 2 View of My Dashboard Page with Transfers

If a User is marked responsible for a transfer, their My Dashboard will have a Current Transfers panel on the left. This view will also be visible for the manager of someone doing transfers, so they can keep track of progress. Each opportunity is visible here; notes can be made from the dashboard without going into the Buying Unit individually. The event and message panels are moved to the right side of the dashboard.

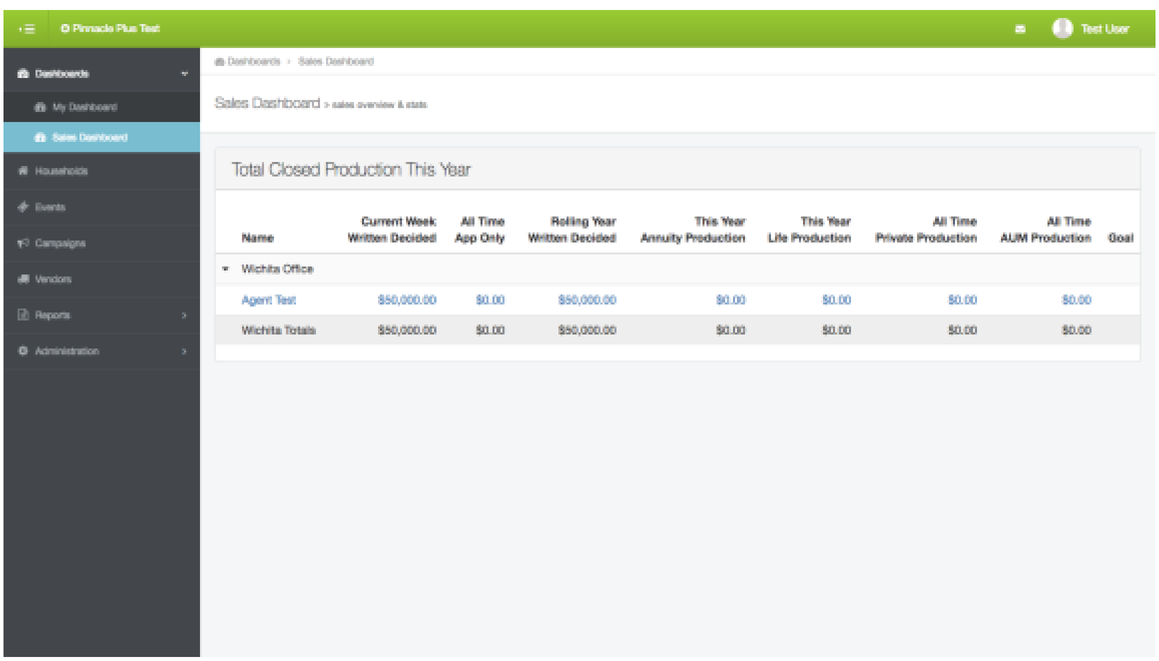


picture 3 My Dashboard page with calls

A user with assigned calls will have those calls displayed on their My Dashboard Page the day they are scheduled. From here they can add notes and schedule another call. When the call is complete, click the "Mark Called" button. Uncomplete calls will be automatically rescheduled to the next day until they are marked as complete.

SALES DASHBOARD

The sales dashboard gives you an overview of your sales numbers. The columns displayed depend on what product types you sell in your office.



picture 4 The sales dashboard summarizes your numbers for different products.

The columns for each agent are as follows:

CURRENT WEEK WRITTEN DECIDED includes the opportunities in the written decided stage for the current week. Annuity, AUM, and Private Placement policies show up here. Contributions also show up here while they are being processed. Note, the value of a Private Placement policy displayed is one third of the sale value. This is done to equivocate the commission received from these policies with the standard of Annity policies.

ALL TIME APP ONLY shows all your opportunities in the App Only stage; this stage precedes the written decided stage. Your goal is to clear out this column and work the leads into written decided.

ROLLING YEAR WRITTEN DECIDED is the same as Current Week Written Decided, just with opportunities over the rolling year. This helps you monitor applications that have been sitting long in the transfer process.

THIS YEAR ANNUITY PRODUCTION lists the closed Annuity policies for the calendar year.

THIS YEAR LIFE PRODUCTION lists the closed Life Insurance policies for the calendar year.

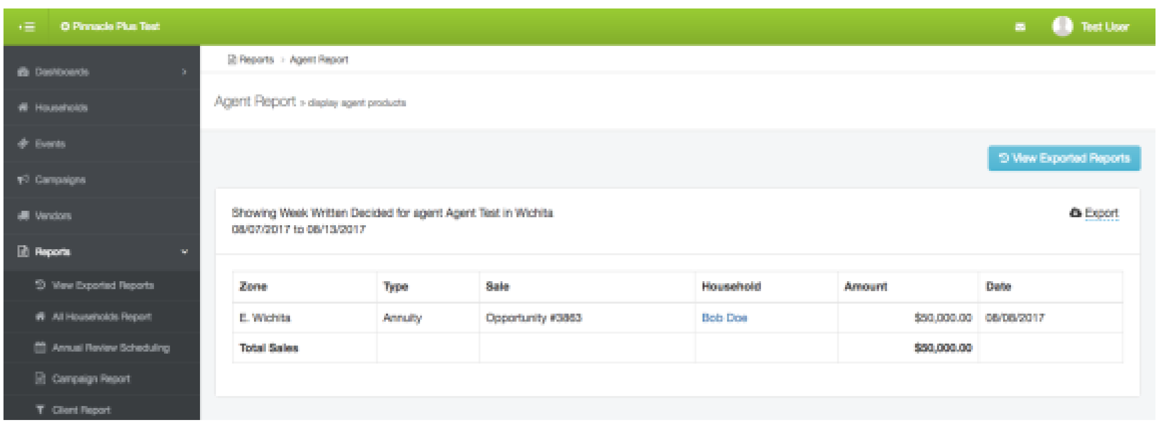
ALL TIME AUM PRODUCTION lists all closed AUM policies.

ALL TIME PRIVATE PRODUCTION lists all closed Private Placement policies.

GOAL is a percentage value of the Current Week Written Decided divided by the Agent's Goal, set in their profile.

AGENT REPORT

Selecting any value on the sales dashboard brings up the Agent Report, displaying the products that make up that value.



picture 5 Agent report for Current Week Written Decided

This report has six columns of information:

ZONE lists the Zone the household belongs to.

TYPE lists the Product type of the sale.

SALE lists whether the sale is a Contribution, Opportunity, or Product.

HOUSEHOLD lists the name of the buyer, and links to their household.

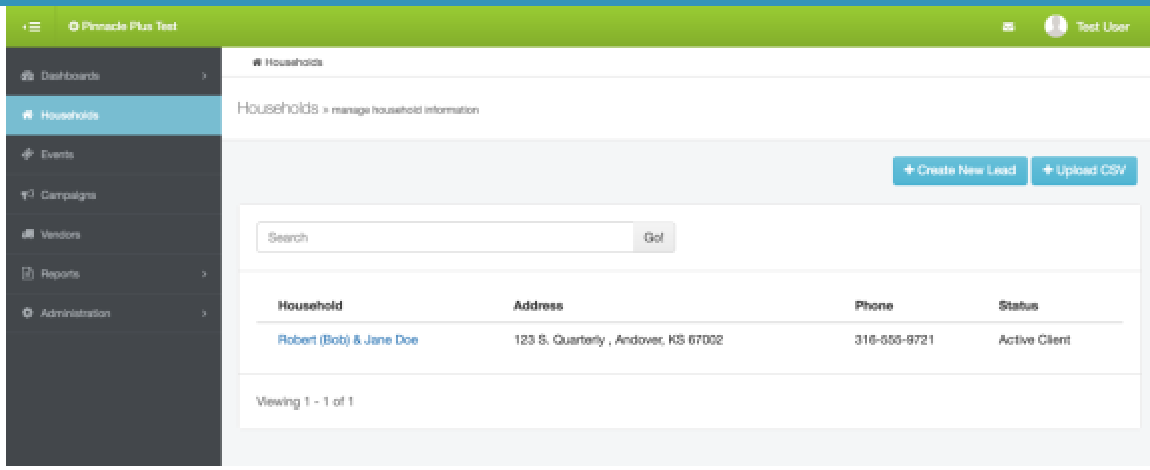
AMOUNT is the sale amount.

DATE is the date of the sale.

The Production agent reports also have sub-totals dividing the rows by month.

The Agent report can also be exported into excel format.

HOUSEHOLDS



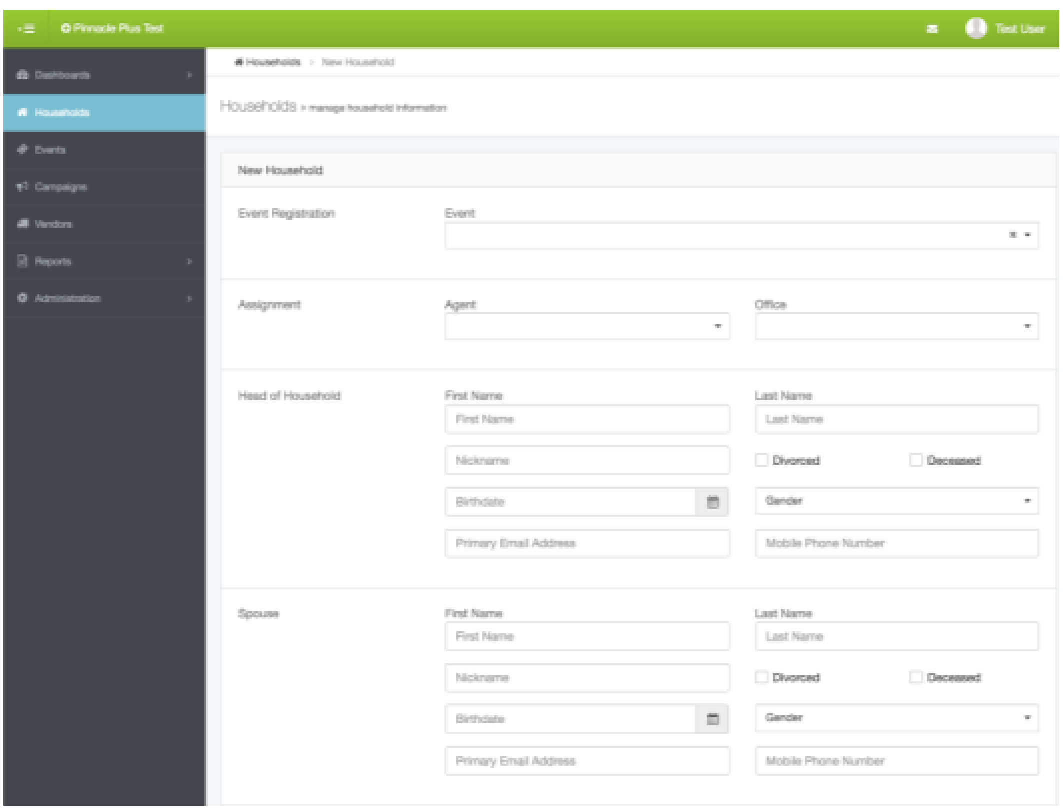
picture 6 View of Household search page. Columns available are Name, Address, Phone, and Status

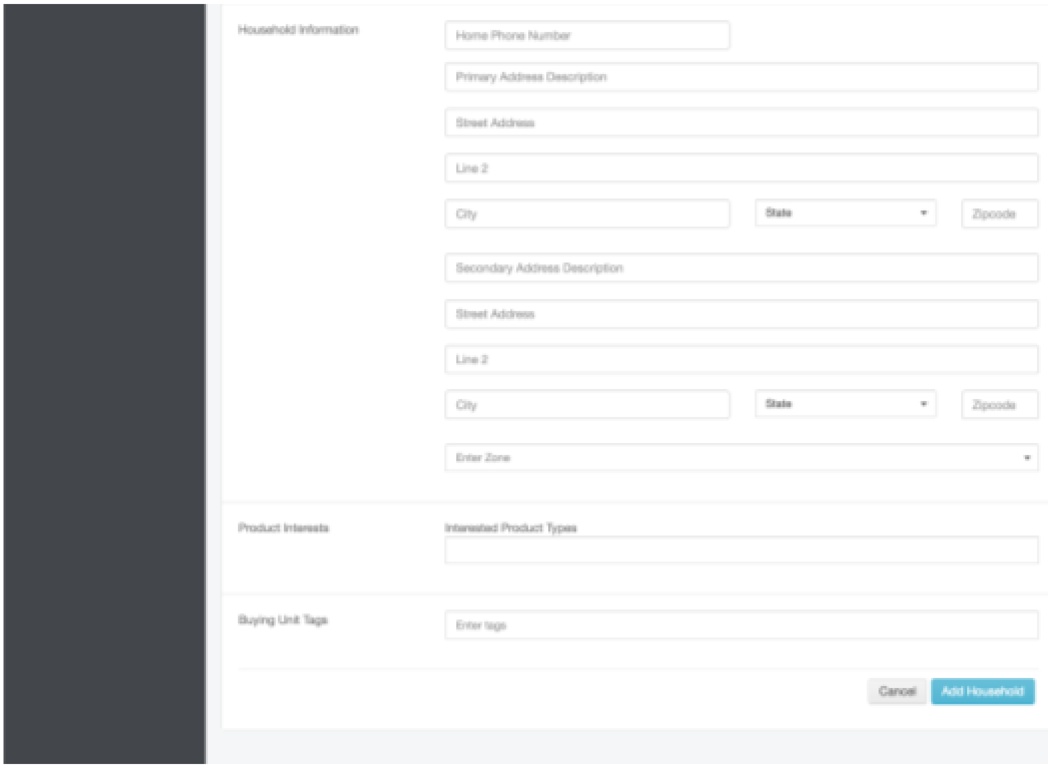
SEARCHING

You can find a household by searching by name (first, last, full, nickname), phone number, and policy number.

ADDING HOUSEHOLDS INDIVIDUALLY

Use the "Create new Lead" button to go to the new household form. This process is more time consuming than a standard import, but will need to be done when someone has requested to be added to the Do Not Mail List. The form is self-explanatory. An Event must be selected to continue with the policy selling process.



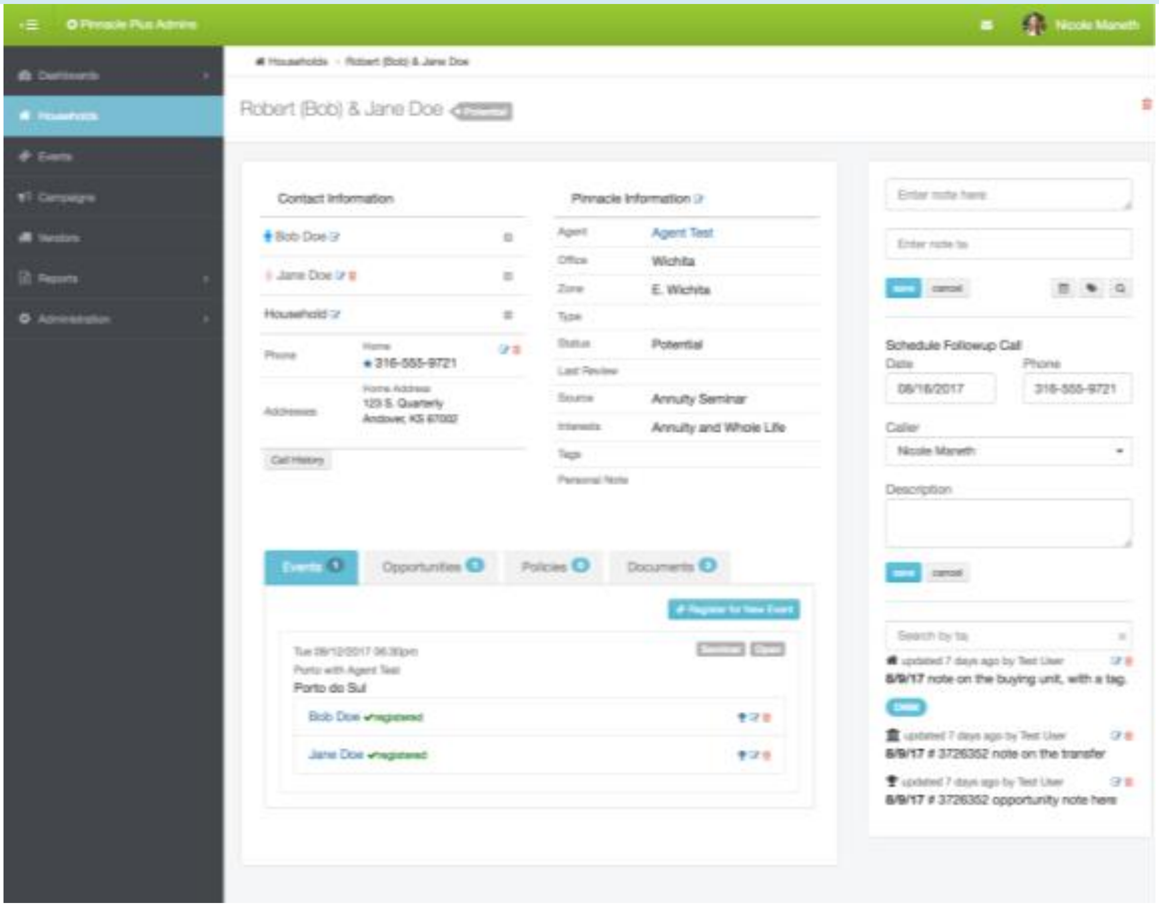


picture 7 Create a Household Form

IMPORTING FROM CSV

You can import households from a CSV file. Use the "Upload CSV" Button on the household search page. The pop up has a template you can download to use for your households. You can rearrange columns in the template, but do not rename them. For the event columns, the date and location must match the Event data in the CRM exactly.

DISPLAY

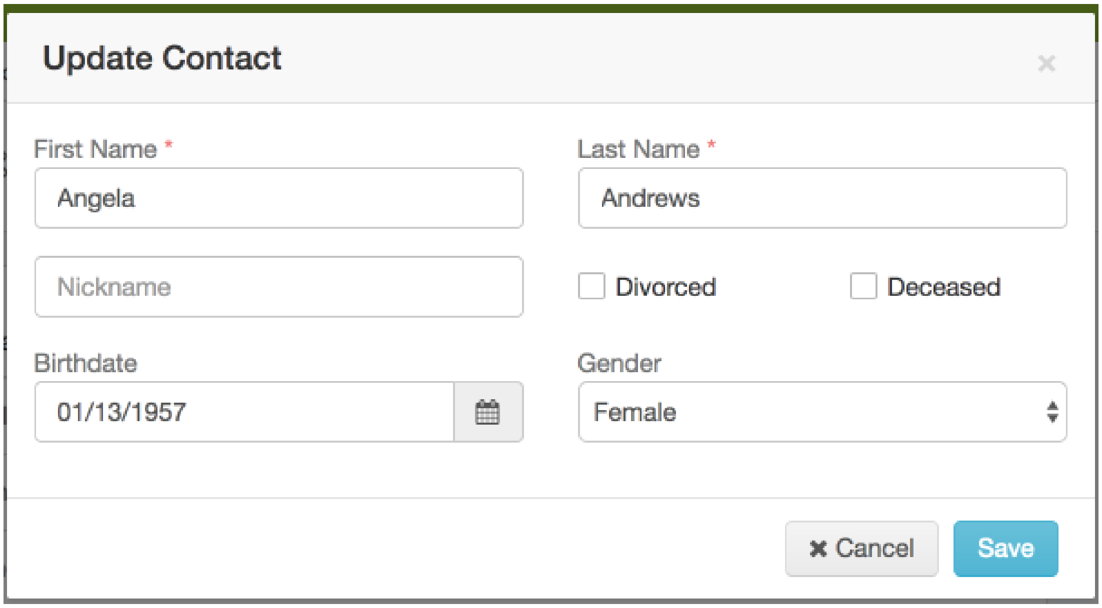


picture 8 Household view with expanded sidebar

There are four main areas on the household view.

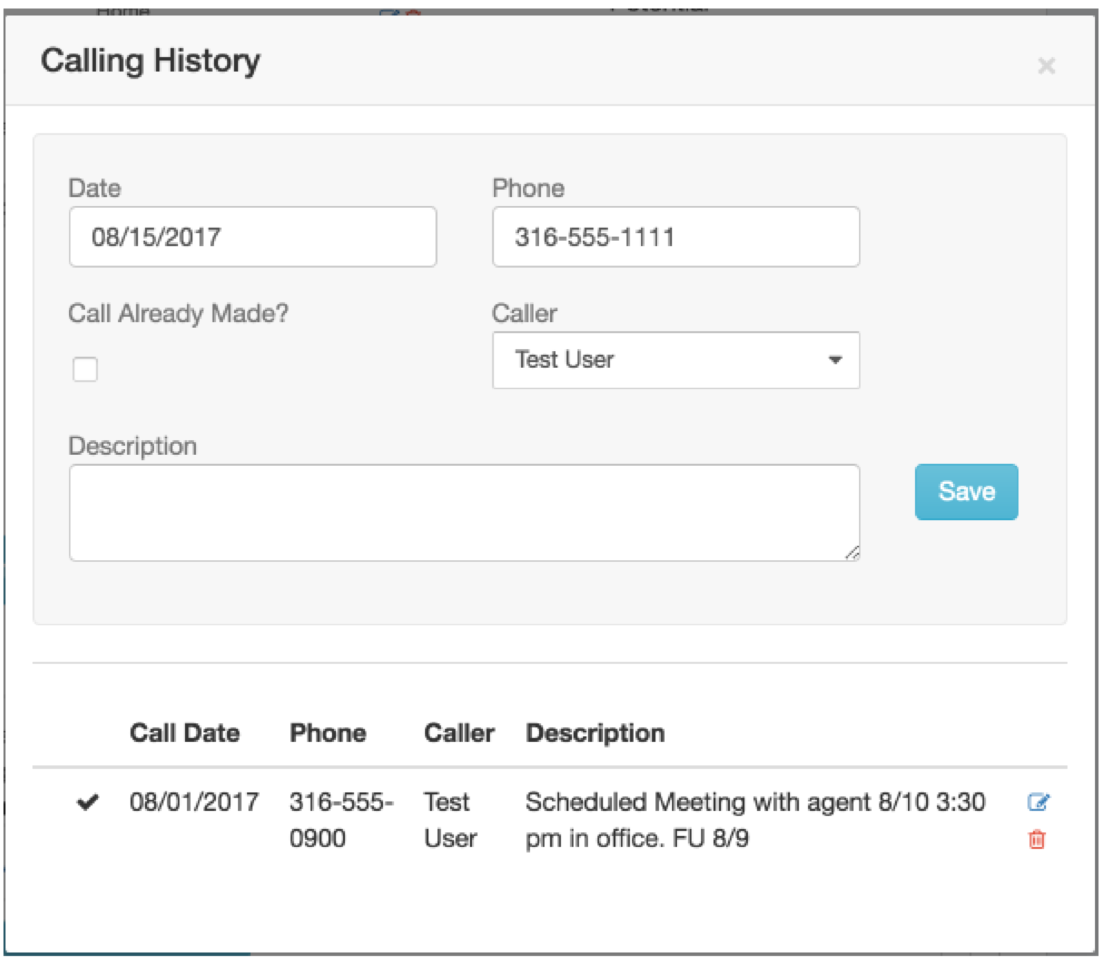
SECTION 1: CONTACT INFORMATION

This section lists the Primary and Secondary Contacts, and their individual email addresses and phone numbers. If a nickname is entered, that will replace their first name for reports and other displays in the system. If a contact is marked deceased they will not show up on exported reports for mailing purposes.



picture 9 Contact edit form

Below is the Household information with main phone number and up to two mailing addresses.



picture 10 Call History Pop Up Form

The last part is a button for a Call History pop-up. You can schedule calls in this pop-up or while entering notes. Scheduled calls show up on the "My Dashboard" page the day they are due and reschedule for the next day until marked complete.

SECTION 2: PINNACLE INFORMATION

This section has information on the household as a whole. The zone is automatically assigned based on the zip code of their main address. You can also manually assign a zone if they fall outside your defined areas. It's important to track their interested products for future campaigns. Tags are also important to track who is on your Do Not Mail list. The personal notes section is useful for remembering small things about your client and their family.

The different household statuses are described below:

LEAD is a Buying Unit with no Opportunities entered.

POTENTIAL is a Buying Unit with an Opportunity entered.

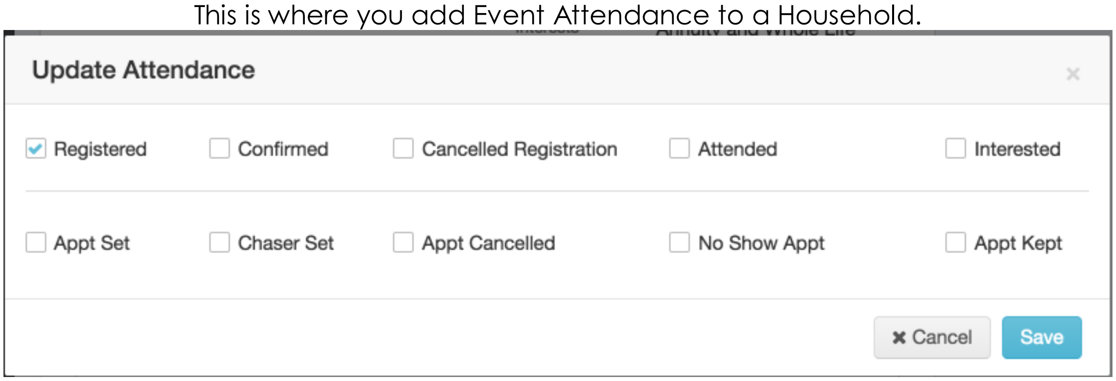
ACTIVE CLIENTS have at least one written decided/issued policy.

INACTIVE CLIENTS have only surrendered policies entered.

SECTION 3: SALE PIPELINE TABS

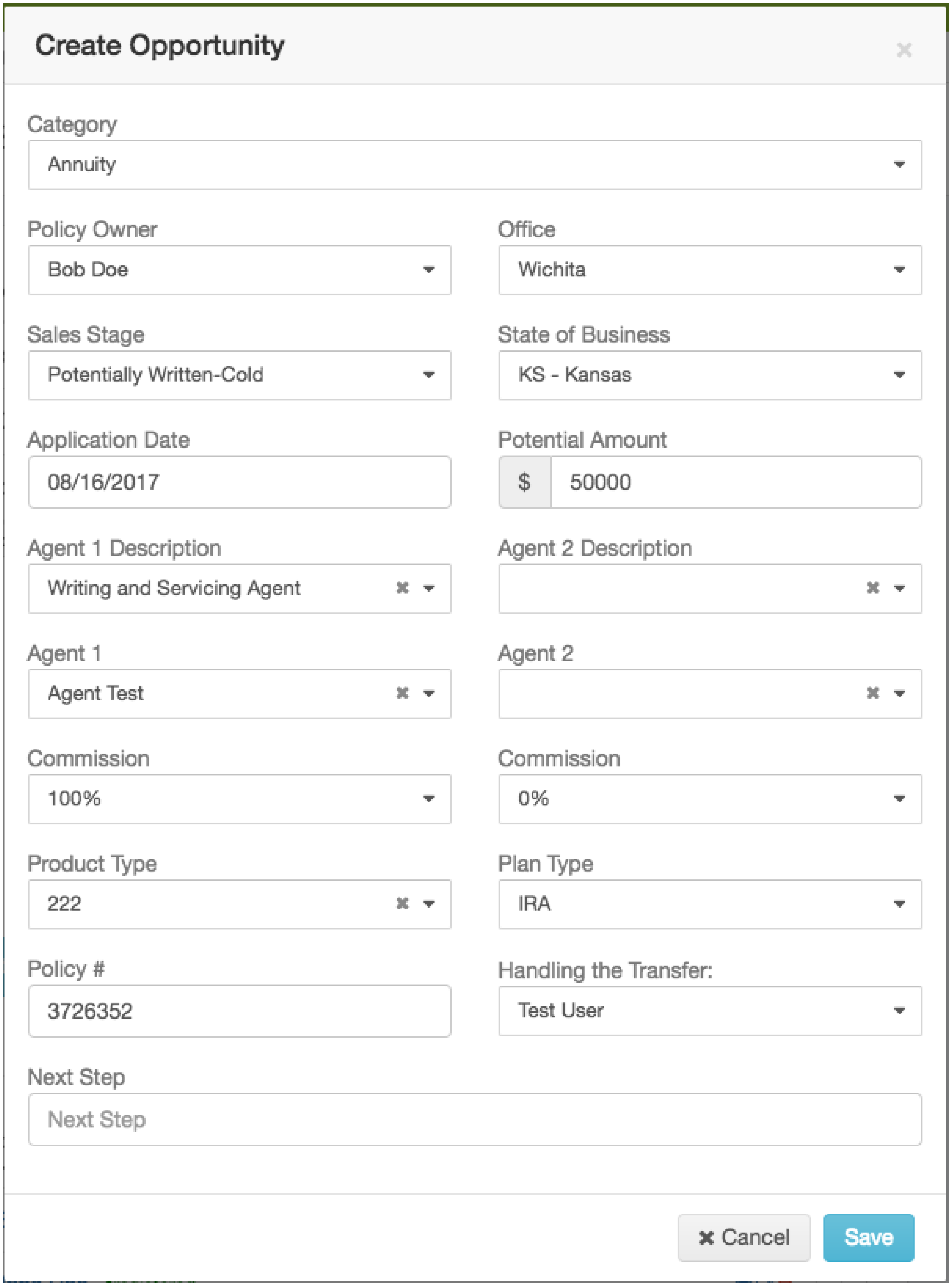
EVENTS TAB

This is where you add Event Attendance to a Household.



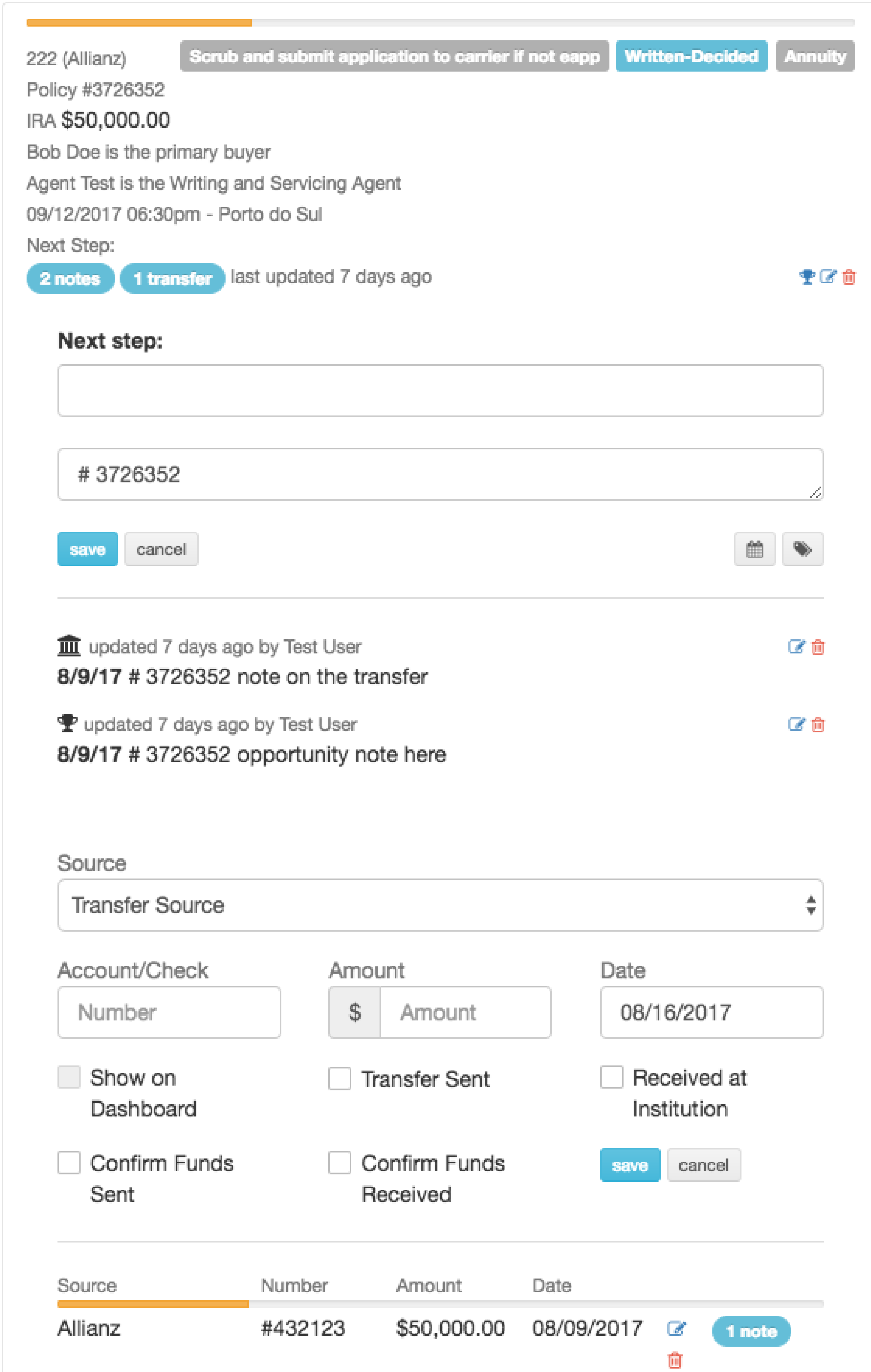
picture 11 Attendance Form

It is important to keep these fields updated for future campaigns. Use the Trophy Icon to turn an event attendance into an opportunity.



picture 12 Opportunity Create/Edit Form

OPPORTUNITIES TAB



picture 13 Fully expanded opportunity listing

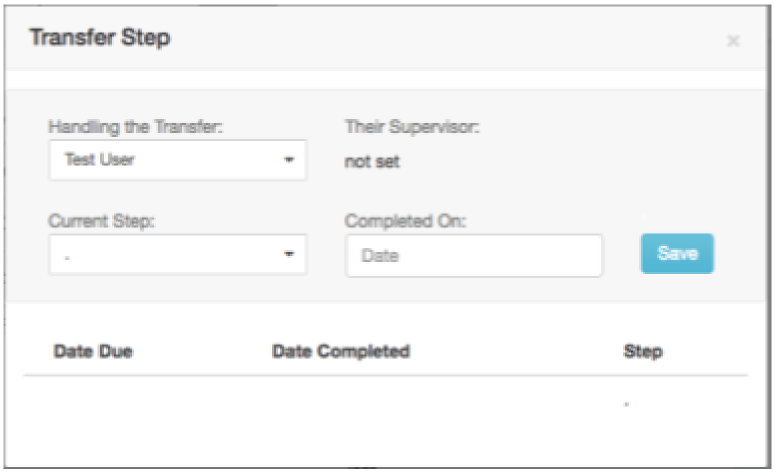
The Listing gives you an overview on basic information about the policy.

The notes and Transfers Sections drop down when you click on the buttons that say "# notes" or "# transfers".

The NOTE FIELD is auto filled with the policy number to help you track notes later. The Notes section also have buttons to drop down the tags select and set a follow-up call.

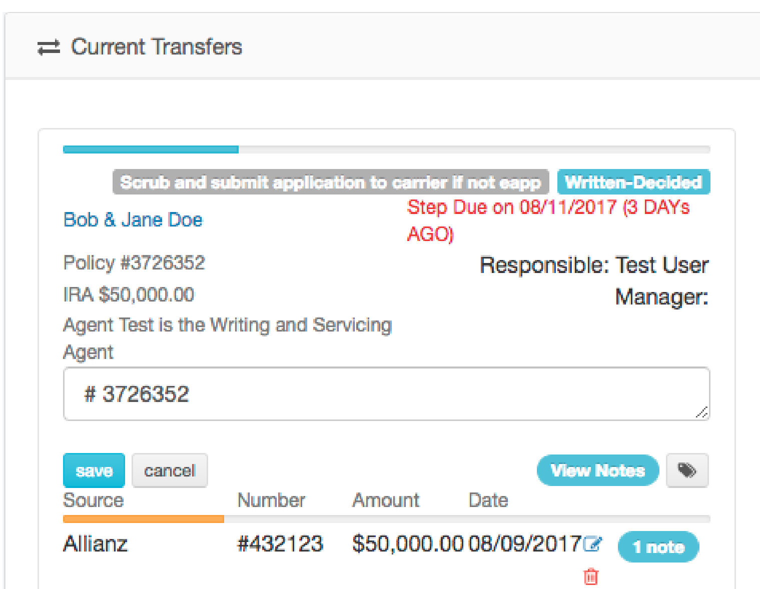
The TRANSFERS SECTION allows you to track incoming accounts for the new policy. Set the source and amount. The check boxes are there to track the transfer progress.

You track TRANSFER STEPS for the opportunity in a modal that pops up. In the screenshot above, you access the pop up by clicking on the current transfer step, "Scrub and submit application…", in gray.



picture 14 Transfer Step pop up

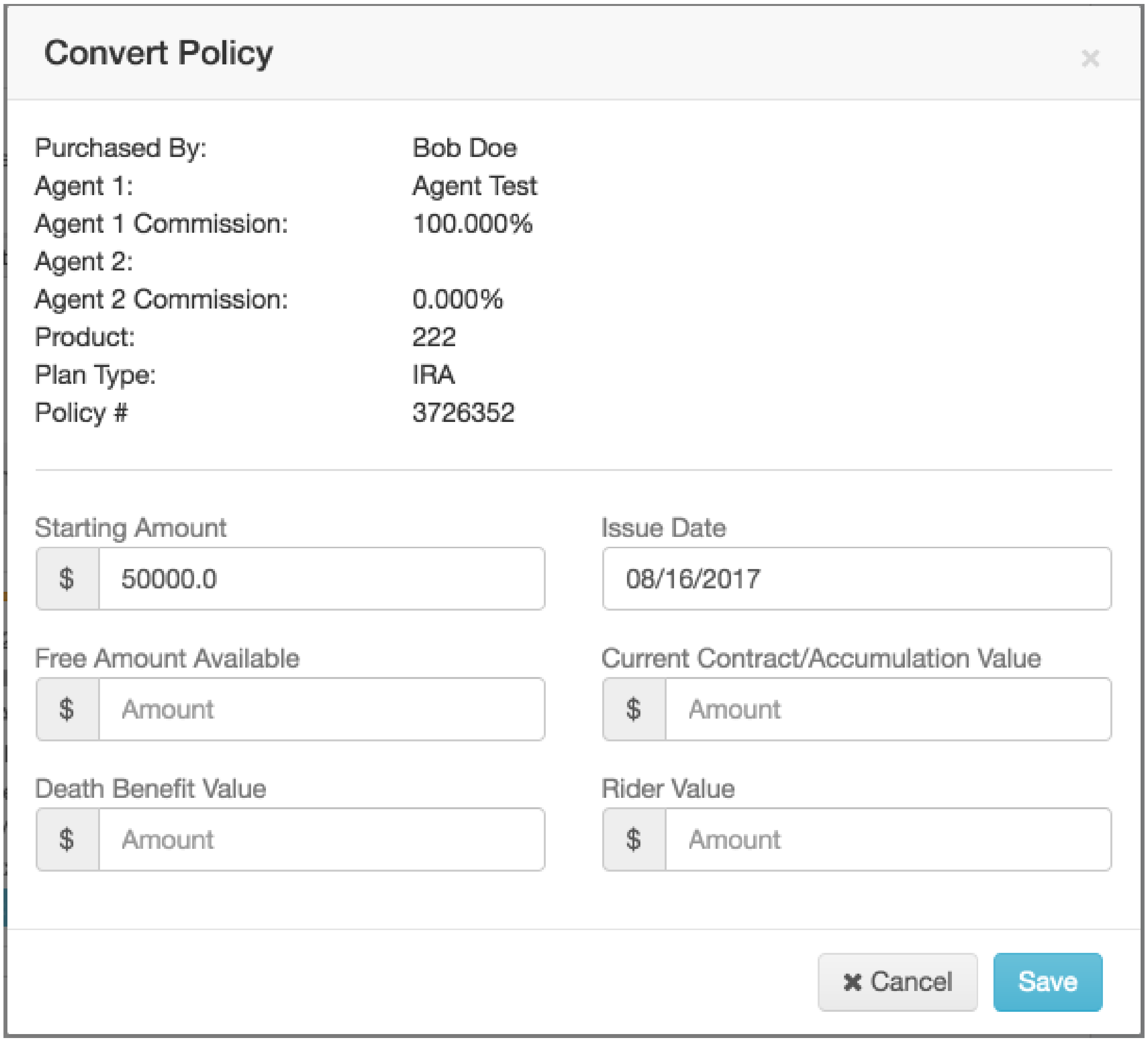
The pop up displays the transfer step history; each step's due and completion dates. The person handling the transfer will see the progress on their My Dashboard. Their Supervisor/Manager, set on the user's profile, will also see the transfer progress on their My Dashboard. The Transfers are sorted by earliest due. They are also color coded so past due events are at the top of the queue in red.



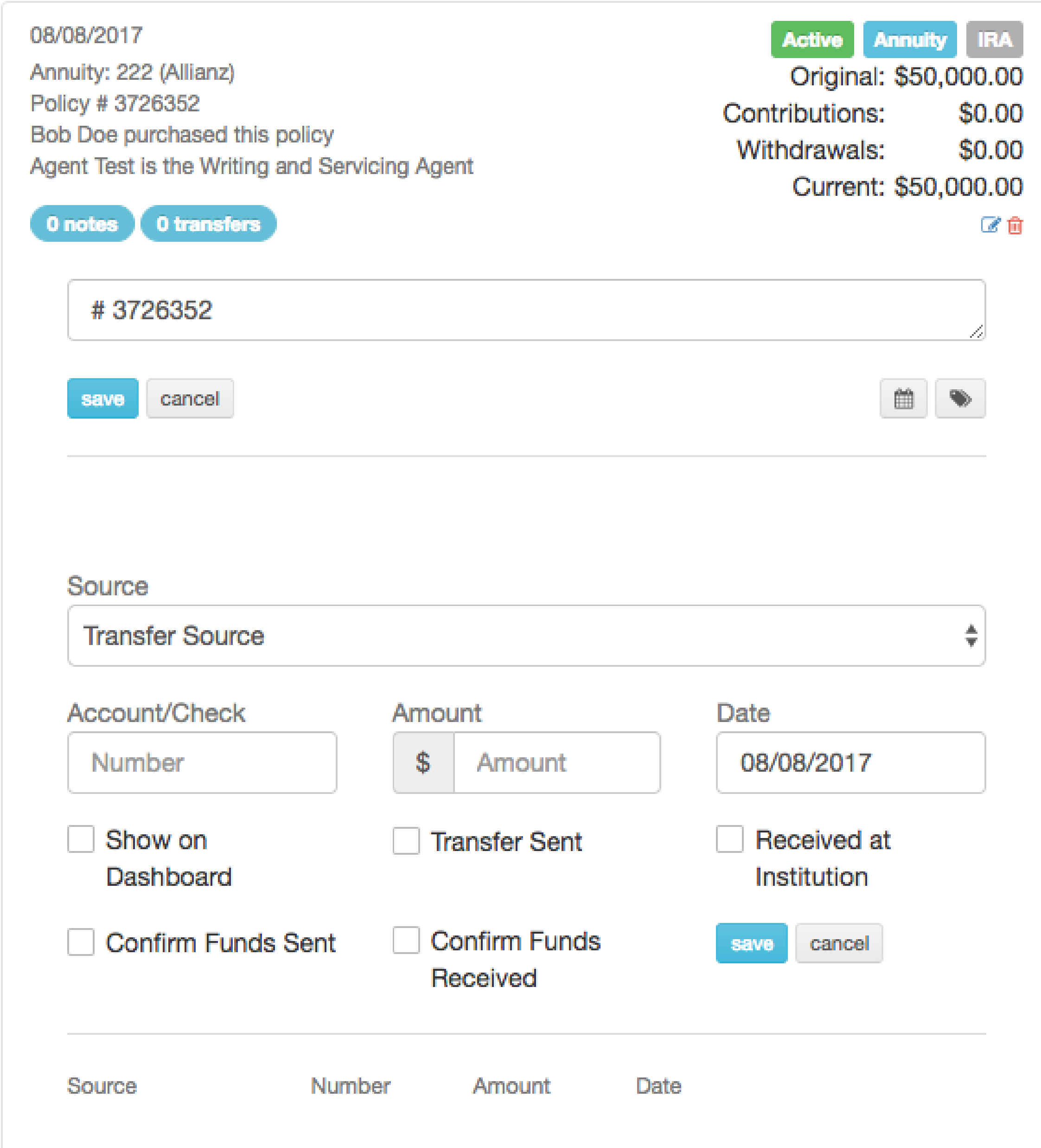
picture 15 View of Current Transfers from My Dashboard

POLICIES TAB

To convert an opportunity to a policy, use the trophy icon and fill in the correct fields.



picture 16 Annuity policy conversion pop up



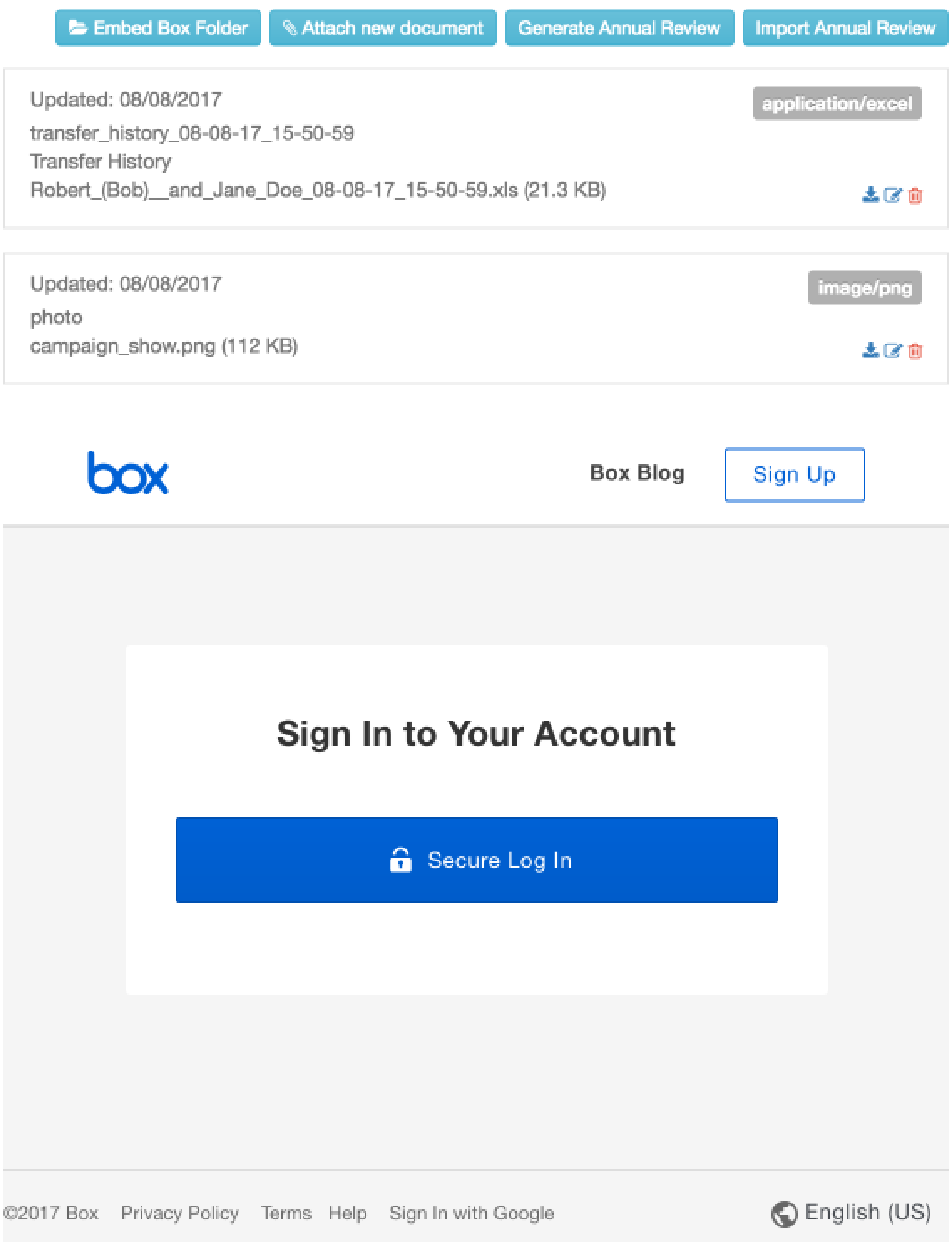
picture 17 Policy view in Policy Tab

The policy view is very similar to the opportunity view. The notes section works the same way, with the policy number automatically added to the beginning of the notes field. It carries over transfers and their notes from the opportunity. When adding a contribution or withdrawal to an issued policy, use the "Show on Dashboard" checkbox so it shows up on your My Dashboard page to track progress.

DOCUMENTS TAB

The Documents Tab provides a place to store files related to the household. Use the "Attach new document" Button to upload a file to the household. You can embed a box folder on the client by pasting the share link into the "Embed Box Folder" option. You must login to see the box files, and only people with the right permissions can view these files.

There are also the options to generate and import an annual review. The import pop up has a template you can download. The CRM will create transfers that line up with the values found on each policy in the file selected. The generate option will create an annual review and place it in the documents tab.



picture 18 Document tab, with box embedded

SECTION 4: NOTES SIDEBAR

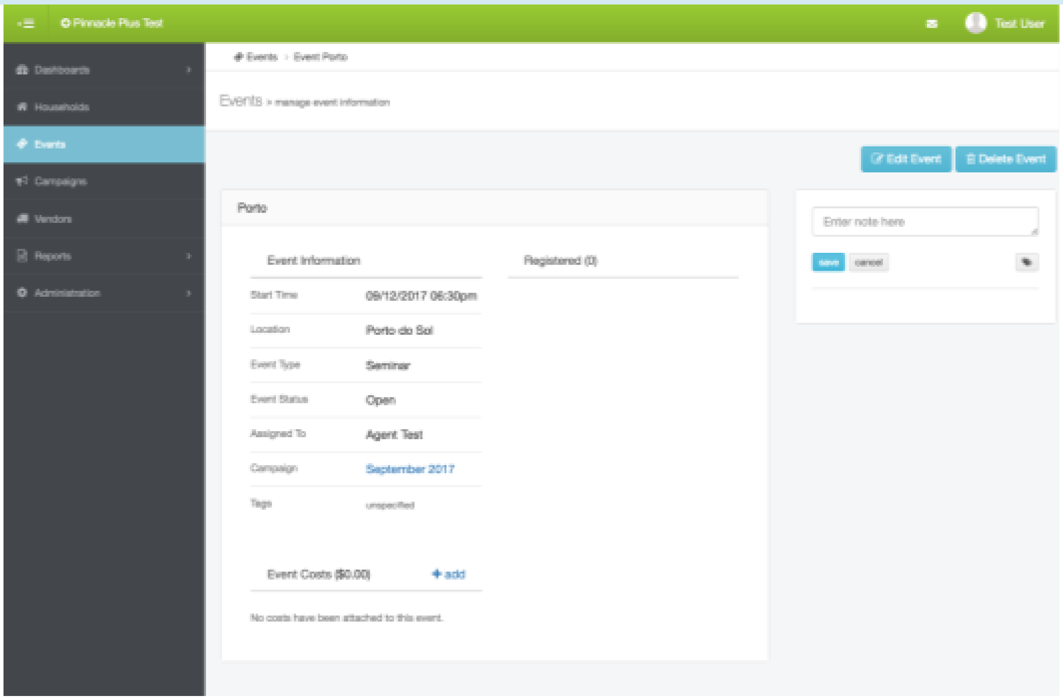
The right sidebar displays all the notes for the household. Notes are sorted by most recent and include who wrote the note. The icon by the note describes where the note was made. House icons are from notes made on the sidebar, for the whole household. Trophy icons are for opportunity notes. Bank icons are for transfers. Umbrellas are for policies. Phone icons are for call notes. Notes can also be tagged by expanding the tags section under the note box. There is also a search icon that allows you to search for notes by their tags. As previously mentioned, you can schedule a follow-up call from the note section. These calls will show up on your dashboard the date scheduled, and will display in the call history available through section 1 of the household.

EVENTS

SEARCHING

You can search for an event by its name, location, agent, or tags. Events are sorted by most recent date.

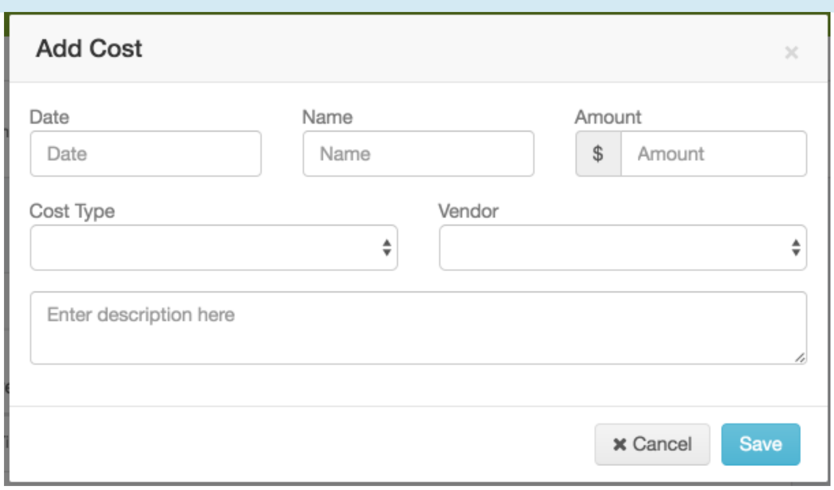
DISPLAY



picture 19 Sample view of an event

Events have a date/time, location, type, status, and agent. All events must be attached to a campaign to use the campaign report. There is a notes sidebar like in the household for your use as well.

COSTS



picture 20 Event cost form

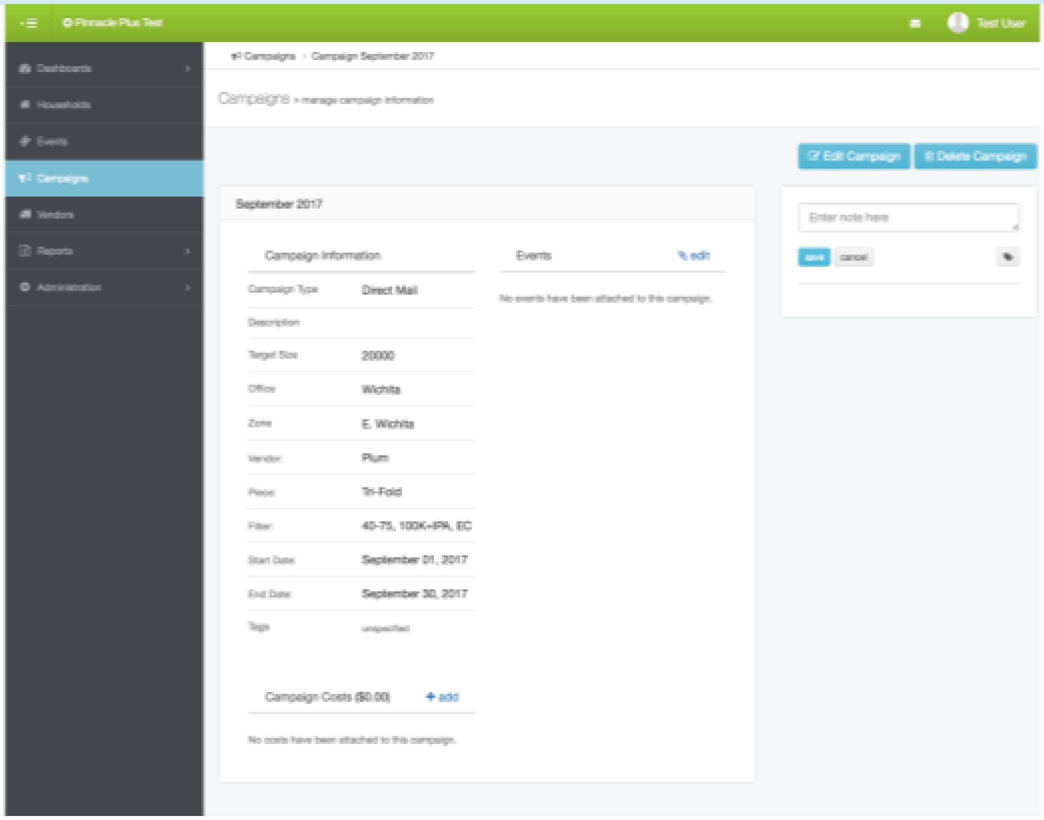
It is important to track the costs for each event to get an accurate profit margin and use the campaign report. Event costs are things like food, gift cards, and seminar booklets.

CAMPAIGNS

SEARCHING

You can search for a campaign by name, campaign tag, or event tag.

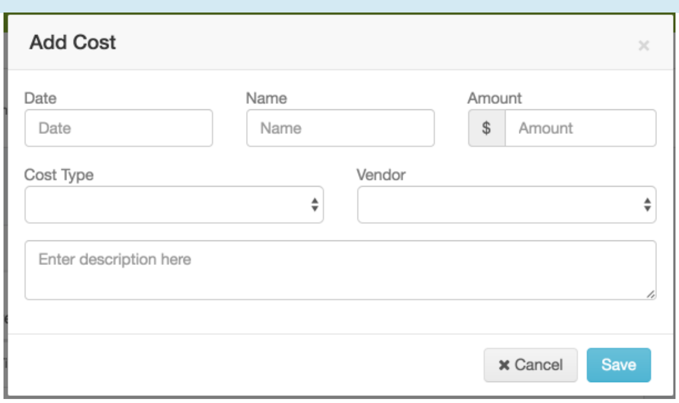
DISPLAY



picture 21 Sample view of a campaign

Campaigns have a date range, target size, office, zone, vendor, marketing piece, filters, and tags. There is a notes sidebar like in the household for your use as well.

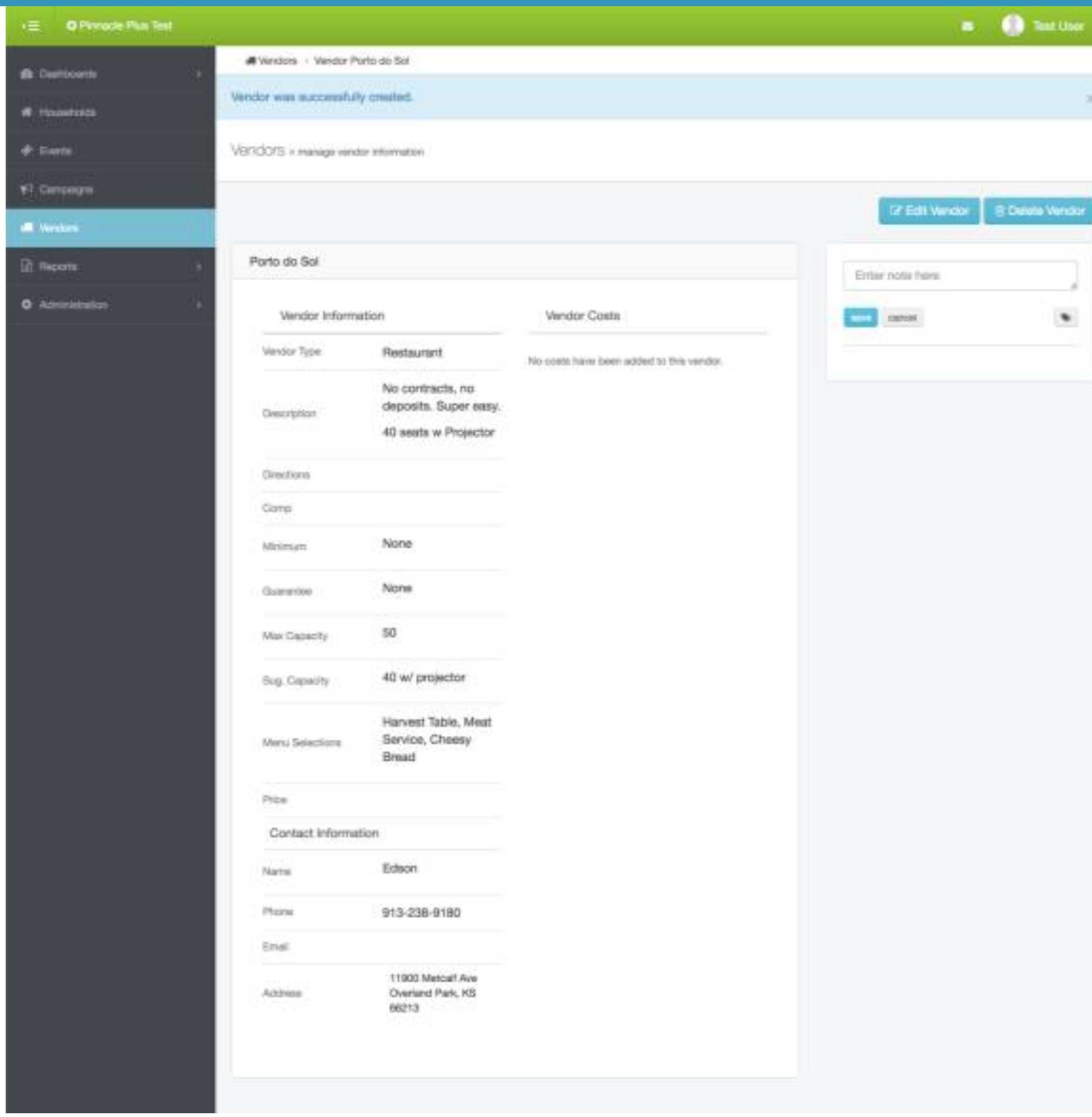
COSTS



picture 22 Campaign cost form

It is important to track the costs to get an accurate profit margin and use the campaign report. This is where you enter the cost of mailers.

VENDORS

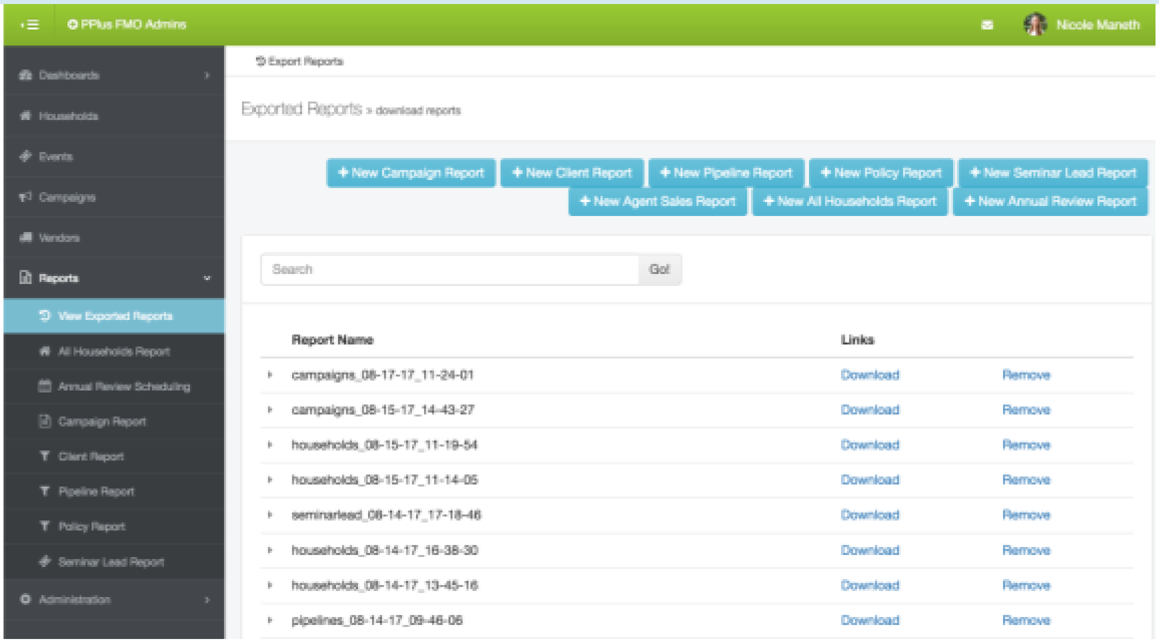


picture 23 Example view of vendor

This allows you track contact information and other details on using an event space. All associated costs from events and campaigns show up in the Vendors Costs section. There is also a notes section for relevant information.

REPORTS

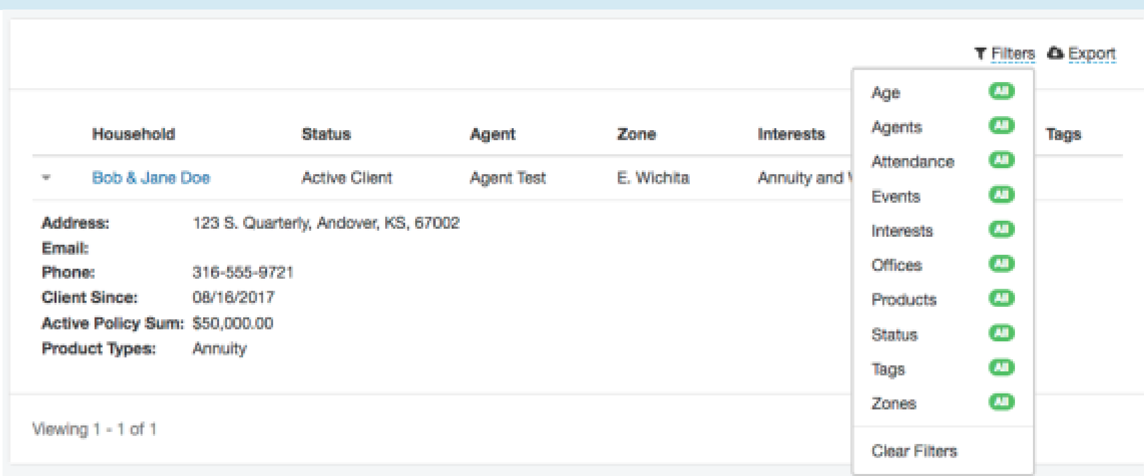
VIEWING EXPORTED REPORTS



picture 24 Exported reports

Each report has an export button next to the filters button. The exported reports view shows the name and links to download and remove the report. Using the arrow to expand each entry shows you who generated the report and when, what filters were used, the date range used, and the file size. This page shows up to 25 most recent reports. These files are stored on Amazon s3 private and secure servers.

ALL HOUSEHOLDS



picture 25 Household report view

The All Households report shows every household in the CRM, regardless of status.

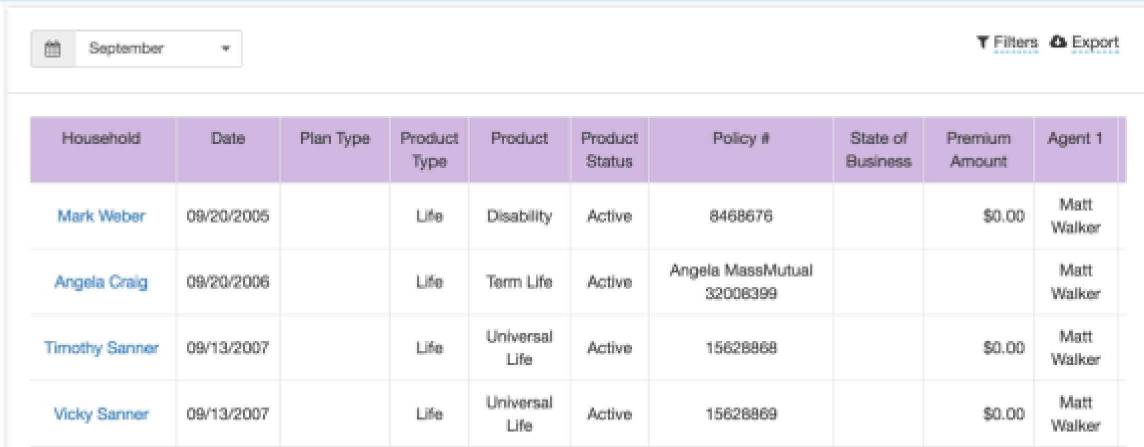
COLUMNS

The main columns are household name, status, agent, zone, interested products, and tags. The expanded view shows their contact information, total value of their active policies, and types of their active policies.

FILTERS

Filters available are age, agent, event attendance, specific events, interested products, office, type of active policy, household status, household tags, and zone.

ANNUAL REVIEW SCHEDULING



Household	Date	Plan Type	Product Type	Product	Product Status	Policy #	State of Business	Premium Amount	Agent 1
Mark Weber	09/20/2005		Life	Disability	Active	8468676		$0.00	Matt Walker
Angela Craig	09/20/2006		Life	Term Life	Active	Angela MassMutual 32008399			Matt Walker
Timothy Sanner	09/13/2007		Life	Universal Life	Active	15628868		$0.00	Matt Walker
Vicky Sanner	09/13/2007		Life	Universal Life	Active	15628869		$0.00	Matt Walker

picture 26 Annual Review Scheduling Report view

This report allows you to see all policies ready for an annual review in a selected month. Note, Private Placement policies have a shorter review period and show up in the report for one month before their trigger on date.

COLUMNS

The columns are the purchaser's name, with link to their household, issue date, plan type, product, policy status, policy number, state of business, premium amount, agents and their commissions.

FILTERS

The filters available are agent, office, state of business, and policy type and status.

CAMPAIGN REPORT

▾AMP June 2017 JT (06/01/2017 - 06/30/2017)

Agent	Program Date	Day of Week	Campaign								
			Office	Zone	Filter	Piece	Vendor	Quantity	Advertising Cost	Mailer Response Rate	Cost / ATT
Tupper	06/28/2017	Wed	Denver	Custom Denver	Blue Sheet Only: 1/1/15-5/25/17	Custom Black & Green Bifold	Plum	1305	$639.45	4.83%	$16.83
Tupper	06/27/2017	Tue						1305	$639.45	5.44%	$13.32
Campaign Averages/Totals								2610	$1,278.90	5.13%	$14.87

Event				Total Marketing Costs	Location	Time	Program Attendance Report					Appointments			
Food	Gift Card	Program	Total Event Costs				# RSVPs	ATT	% ATT	% Drop Off	House Hold ATT	# of Appts made	% of Appts made	# of Appts kept	% Appts Made/Kept
$2,728.93	$45.00	$75.18	$2,849.11	$3,488.56	Maggiano's Denver	18:00	63	38	60.32%	39.68%	28	10	35.71%	6	60.00%
$3,997.72	$75.00	$78.76	$4,151.48	$4,790.93	Fogo De Chao Denver	18:00	71	48	67.61%	32.39%	36	15	41.67%	9	60.00%
			$7,000.59	$8,279.49			134	86	64.18%	35.82%	64	25	39.06%	15	60.00%

Sales									Premium Earned per Marketing Dollar
# Sales	% Sales to Appts	Cost/Annuity Sale	# Policies Submitted	Submitted Premium	Pd Premium Seminar Only	Pd Referral Premium	% Submitted to Pd	Pd Premium Total	
4	66.67%	$872.14	4	$74,495.28	$74,495.28	$0.00	100.00%	$74,495.28	$21.35
0	0.00%	$0.00	2	$105,000.00	$0.00	$0.00	0.00%	$0.00	$0.00
4	26.67%	$2,069.87	6	$179,495.28	$74,495.28	$0.00	41.50%	$74,495.28	$9.00

picture 27 Three shots, scrolling view of campaign report

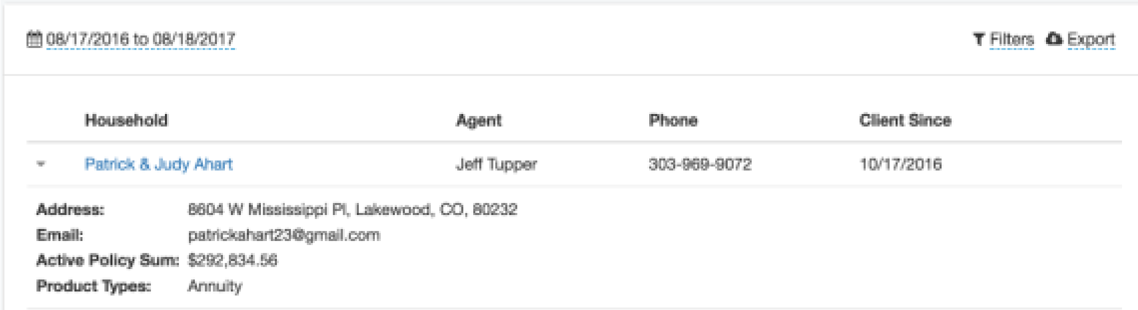
COLUMNS

This report is very wide, with information about marketing materials, appointments, and sales. All resulting in "Premium earned per marketing dollar."

FILTERS

Available filters are agent, campaign tags, campaign type, event tags, office, zones.

CLIENT REPORT



picture 28 Client report view

The Client Display shows active clients who became clients between the dates selected.

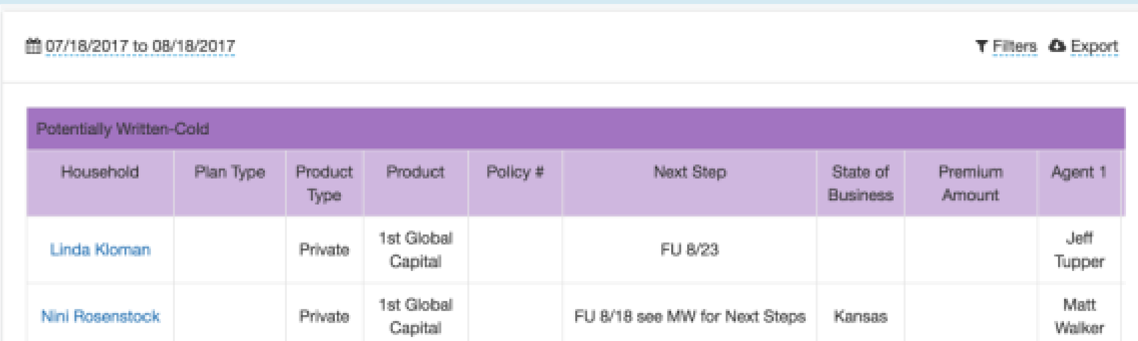
COLUMNS

The main columns are household name, agent, phone, and the date they became a client. The expanded view shows their contact information, total value of their active policies, and types of their active policies.

FILTERS

Filters available are agent, search by client name, office, policy types and statuses, and tags.

PIPELINE REPORT



picture 29 Pipeline report view

The pipeline report displays the sales pipeline of opportunities in the selected date range. Each sales stage has a section on the report. There are premium totals at the end of each section and at the end of the final report.

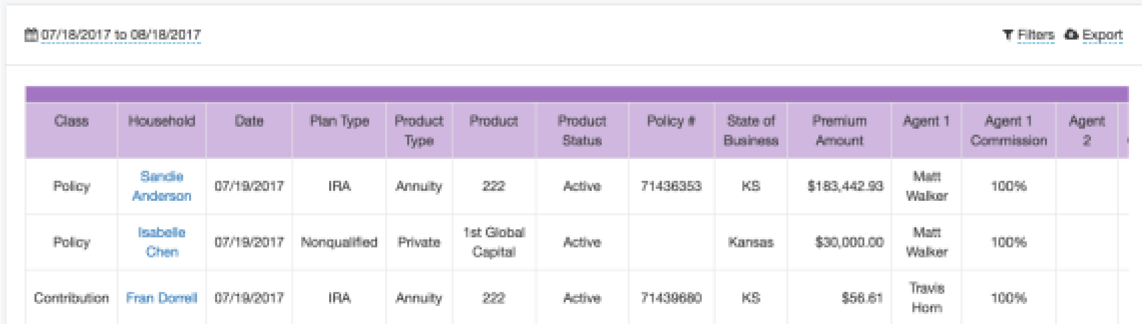
COLUMNS

The columns displayed are the buyer, with a link to their household, the plan type, product type, product, policy number, next step in transfer process, state of business, premium amount, agents and commissions.

FILTERS

The filters available are agent, office, product type, sales stage, and state of business.

POLICY REPORT



07/18/2017 to 08/18/2017 Filters Export

Class	Household	Date	Plan Type	Product Type	Product	Product Status	Policy #	State of Business	Premium Amount	Agent 1	Agent 1 Commission	Agent 2
Policy	Sandie Anderson	07/19/2017	IRA	Annuity	222	Active	71436353	KS	$183,442.93	Matt Walker	100%	
Policy	Isabelle Chen	07/19/2017	Nonqualified	Private	1st Global Capital	Active		Kansas	$30,000.00	Matt Walker	100%	
Contribution	Fran Dorrell	07/19/2017	IRA	Annuity	222	Active	71439680	KS	$56.61	Travis Horn	100%	

picture 30 Policy report view

This report shows policies and contributions/withdrawals with issue dates between the selected date.

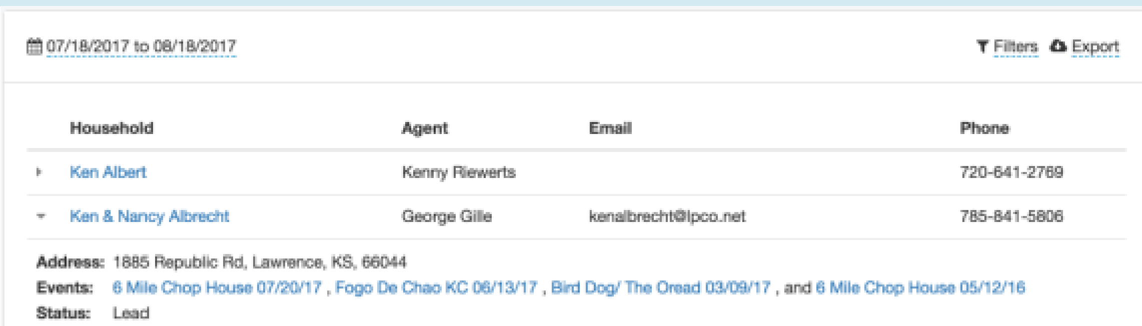
COLUMNS

The columns displayed are whether it's a policy or contribution/withdrawal, the owner of the policy with a link to their household, the issue date, plan type, product type, product, policy status, policy number, state of business, premium amount, agents, and their commissions.

FILTERS

The filters available are agent, office, state of business, display policies or contributions, and policy type and status.

SEMINAR LEAD REPORT



07/18/2017 to 08/18/2017 Filters Export

Household	Agent	Email	Phone
Ken Albert	Kenny Riewerts		720-641-2769
Ken & Nancy Albrecht	George Gille	kenalbrecht@lpco.net	785-841-5806

Address: 1885 Republic Rd, Lawrence, KS, 66044
Events: 6 Mile Chop House 07/20/17 , Fogo De Chao KC 06/13/17 , Bird Dog/ The Oread 03/09/17 , and 6 Mile Chop House 05/12/16
Status: Lead

picture 31 Seminar lead report view

The Seminar Lead Report displays leads registered for seminars that occurred between the dates selected. Only households without a policy issued will show on this report.

COLUMNS

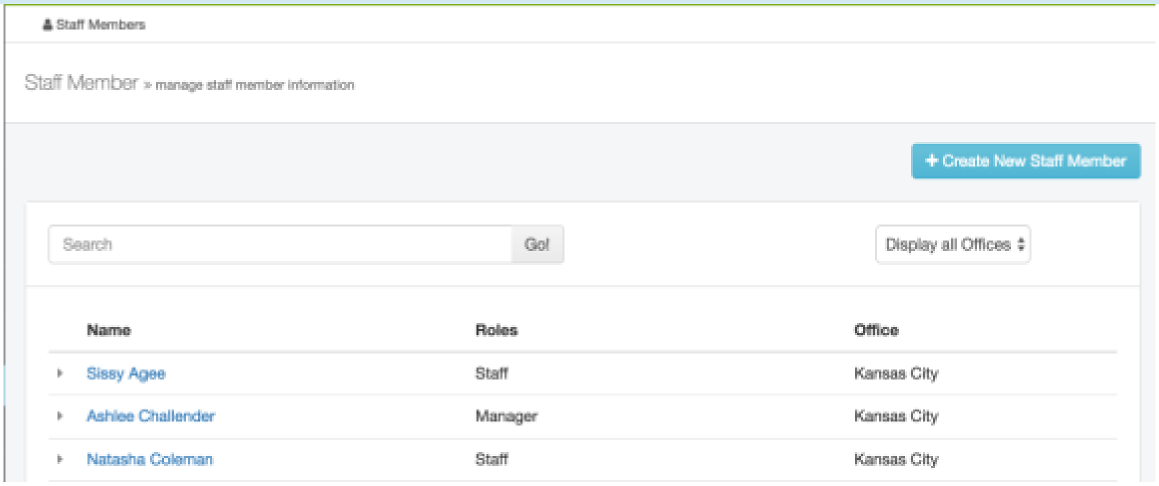
Standard information displayed includes the Household name with a link to it, the agent, email, and phone number. Expanded view shows address, all registered events, and their status.

FILTERS

Available filters are agent, attendance, events, office, sales stage, and tags.

ADMINISTRATION

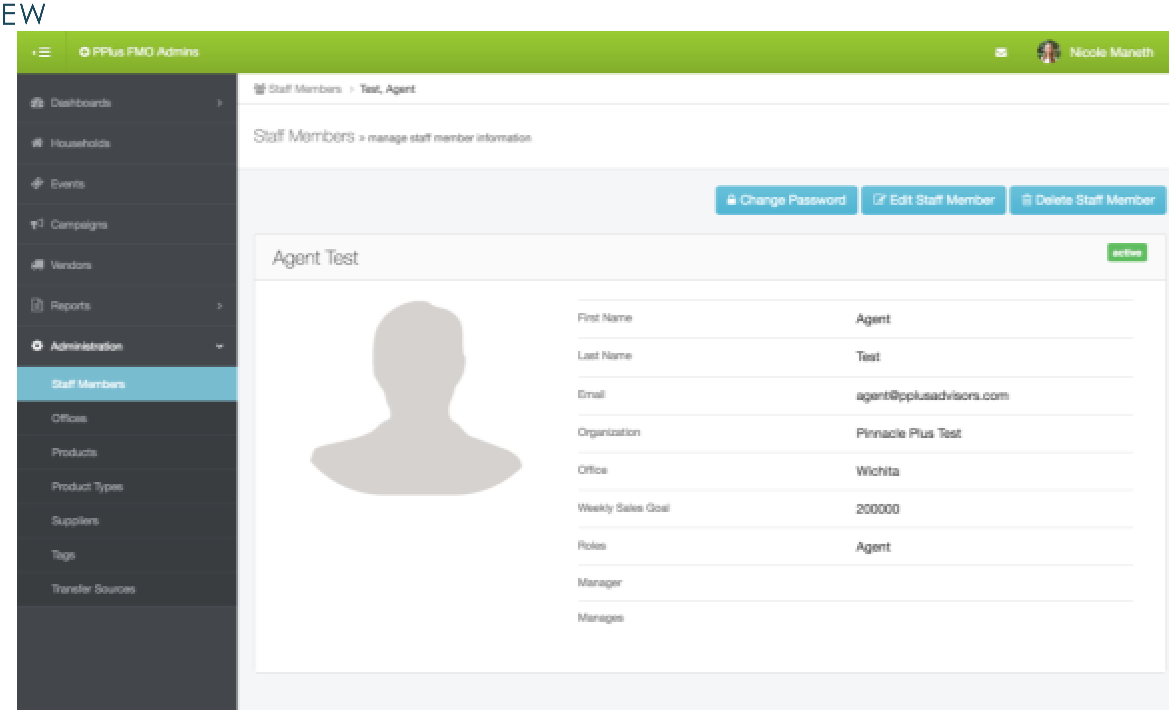
STAFF MEMBERS



picture 32 Staff Members page

You can search for staff by name, and sort by office if you have more than one.

VIEW



picture 33 Staff Member view

Staff members are associated with an organization and office. Agents have an assigned sales goal. You can also set manager(supervisor) roles over other users.

Role Descriptions:

STAFF can access all parts of the CRM. They cannot create or edit users except for their own profile.

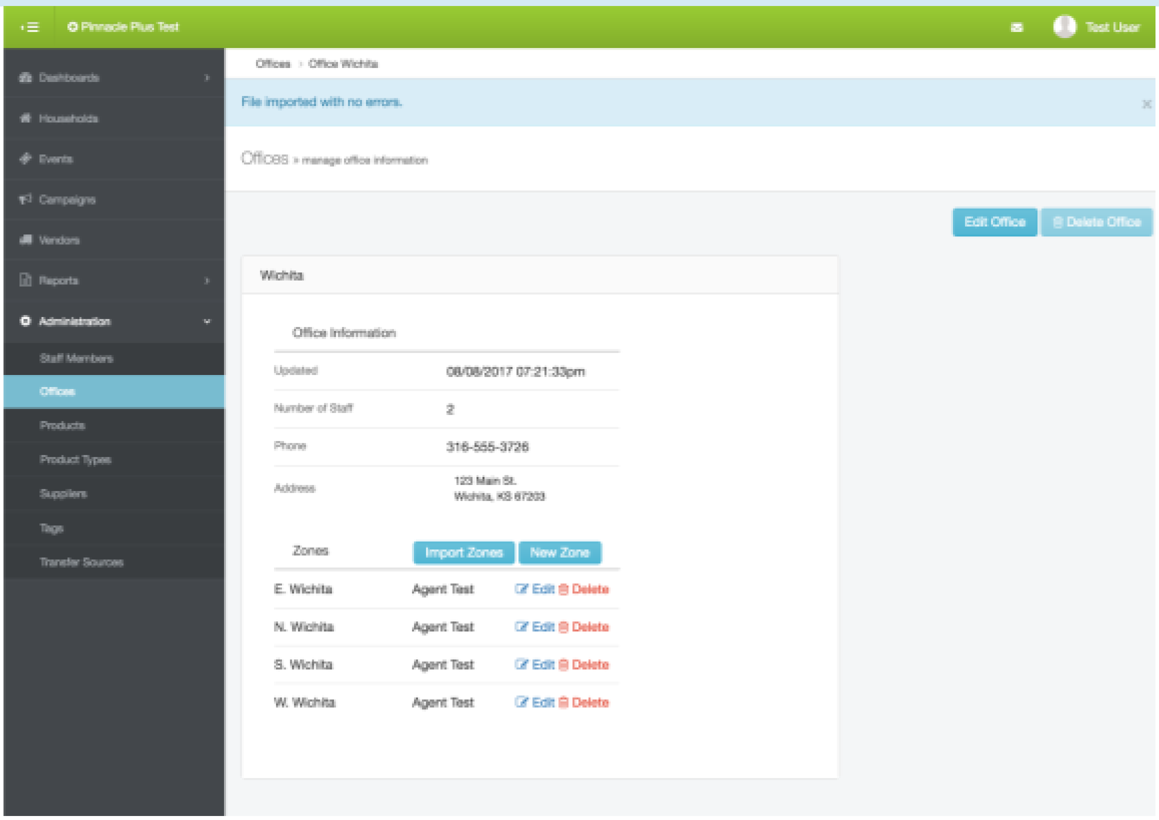
AGENTS have the same permissions as Staff members. They show up on the sales dashboard.

Managers can access all parts of the CRM. They can create and edit all users.

FMO Managers can see the information from every branch of Pinnacle Plus Group in addition to Pinnacle Plus Financial.

SUPER is the IT permissions. They have access to the background data management.

OFFICES



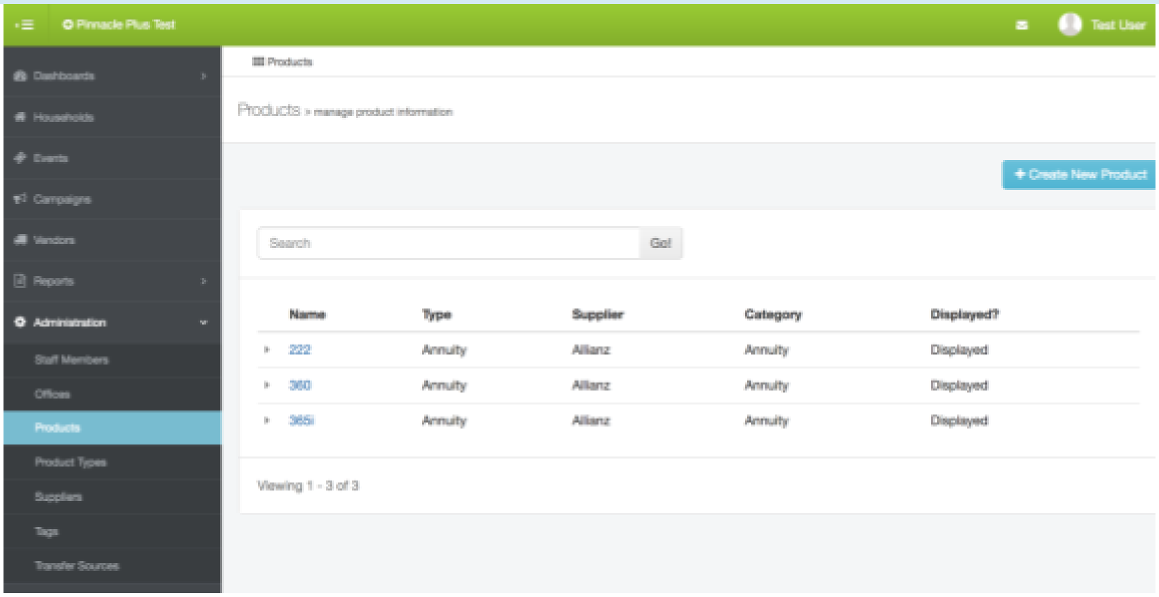
picture 34 Office view

The Office page lists contact information and the number of staff members in it.

ZONES AND ZIPS

Each office has assigned zones. Each zone has an agent assigned to it and a list of unique zip codes. A zip code can only belong to one zone. To add zip codes to the system, you need to use the Import Zones button which includes a downloadable template for this process.

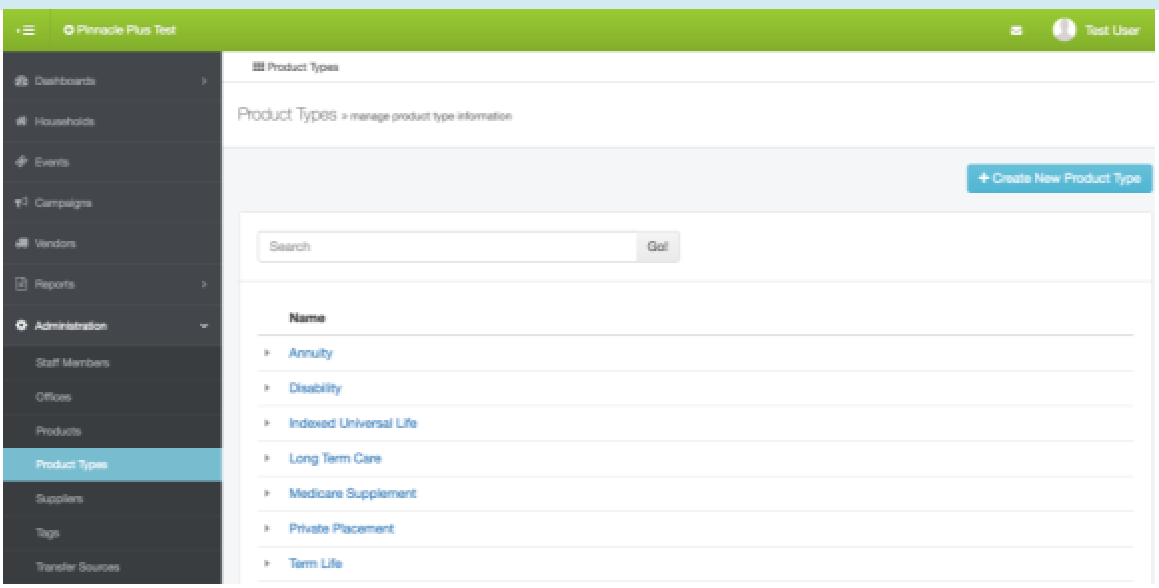
PRODUCTS



picture 35 Products list

This is where you edit products. Each product has a type and supplier. The category determines which form the product appears in (Annuity, AUM, Life, Private). Displayed is an option added to hide old, unused products.

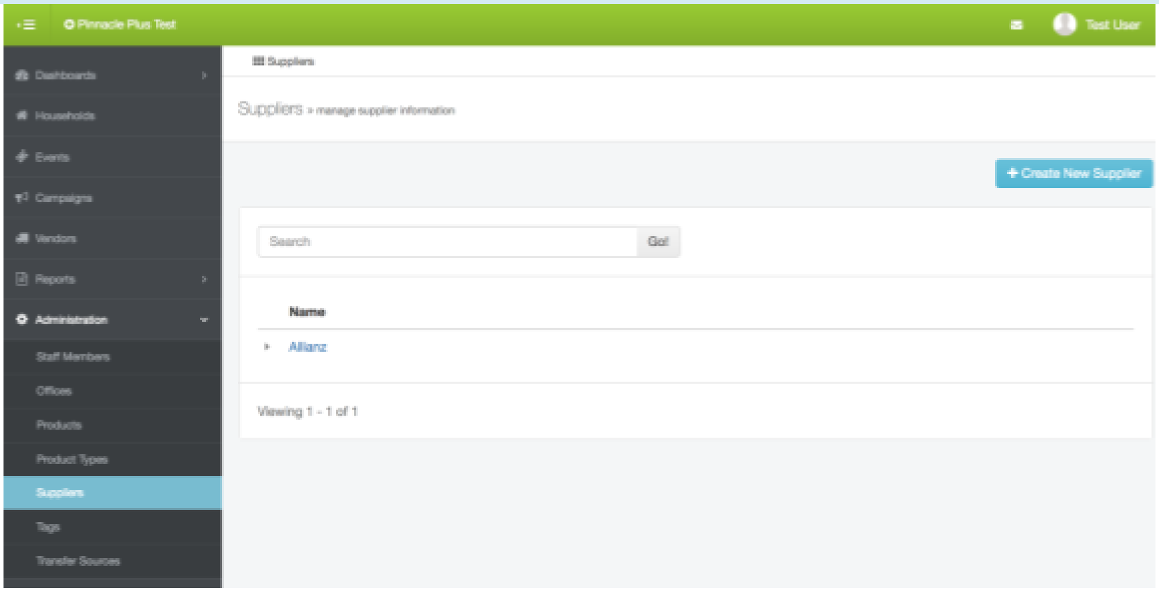
PRODUCT TYPES



picture 36 Product types list

These are the broader product types. They only have a name field.

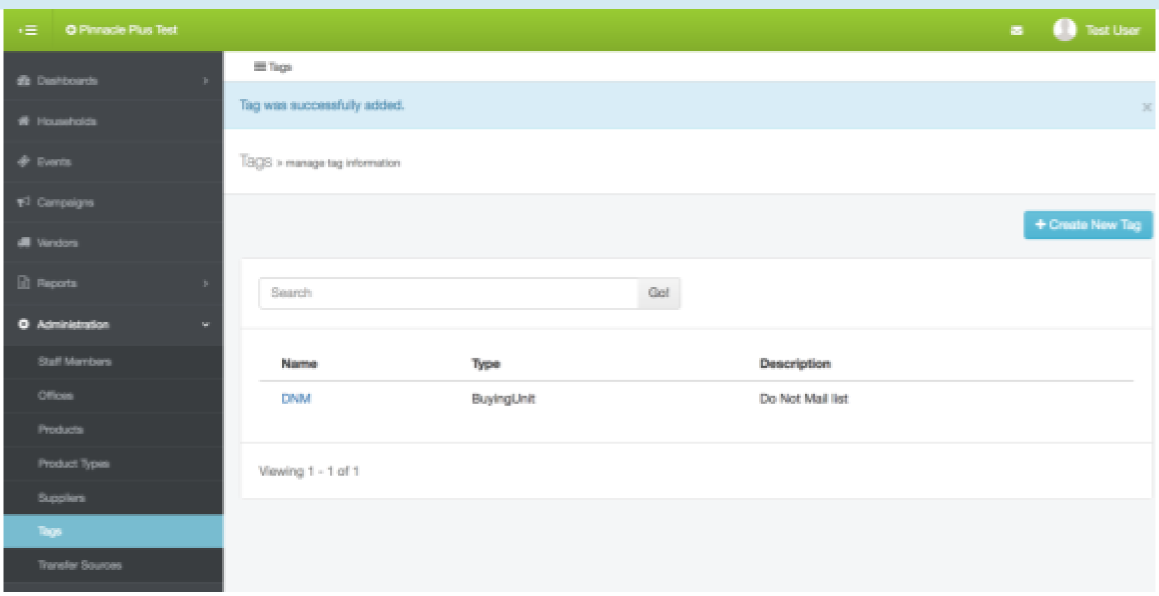
SUPPLIERS



picture 37 Suppliers list

List of suppliers. They only have a name field.

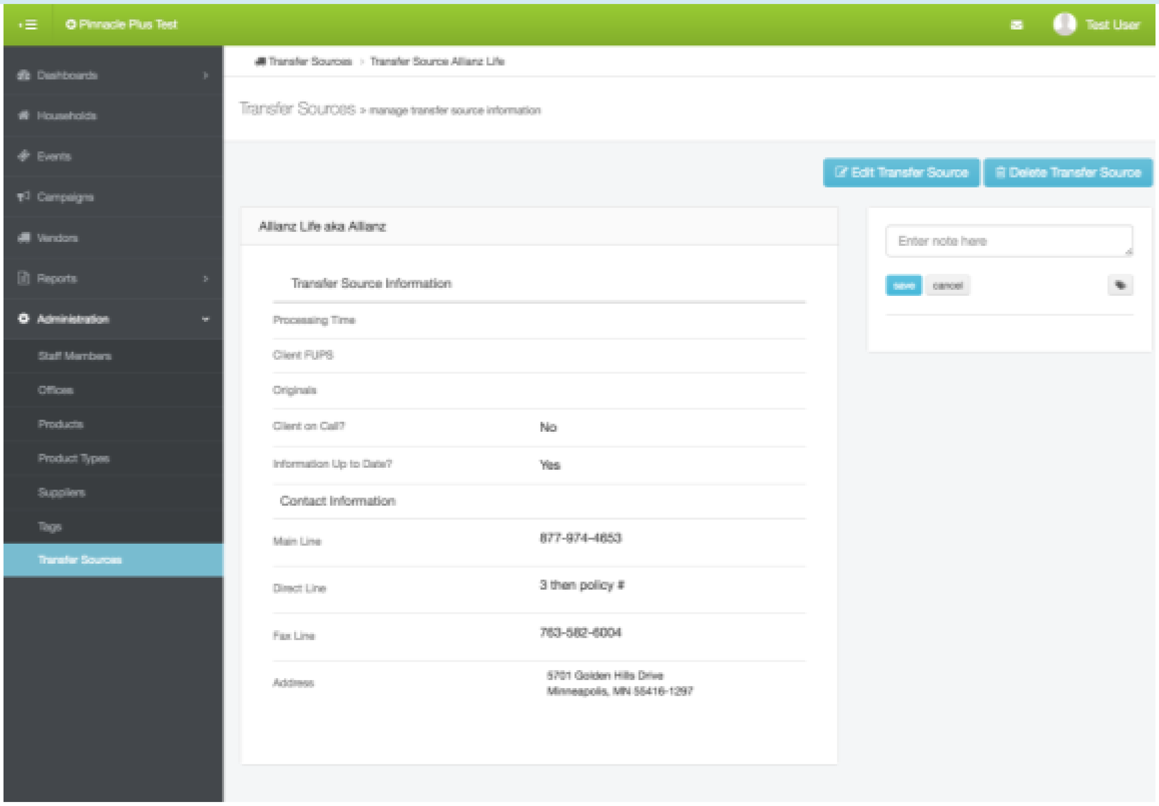
TAGS



picture 38 Tags list

Tags allow you to easily sort through related items. Tags are available on Households (Buying Unit), Events, and Campaigns. You can add a description to explain more detail on the reasoning for the tag.

TRANSFER SOURCES



picture 39 Transfer Source list

The transfer source entries are used when adding transfers for creating policies. You store contact information and other information necessary for gathering information. You can also add notes in the sidebar.