Strengthen Client Relationship with Activity Manager

Tired of the paper nightmare taking over your desk? So many post-it notes you can hardly find your computer? Through the use of Reminders, Notes, and Mailers, *ClientBase Windows* makes tracking communication with your clients a paperless process. Best of all, this information can be shared among agents and used to manage the marketing activities going on in your agency.

Reminders act as "ticklers" to keep you on top of important activities like brochure follow-ups, final payments, welcome home calls, birthdays and other marketing activities. Agents create Reminders to schedule future contacts and maintain daily to-do lists.

Notes allow Agents to easily document the contact your customers have with your agency such as Client Comments, Client Inquiries, or Client Questions.

Mailers act like entries in a marketing "log." They are a historical record created automatically whenever a label, document template, e-mail, or mail merge file is created for a client or group of clients.

(Studies have shown agents' productivity and sales increase dramatically when using an activities management system like ClientBase Windows. Better agent productivity is an important ingredient of a happy and successful agency.)

Example:

The agency's most productive agent, Dianne, works from a daily Reminder and to-do list in *ClientBase Windows*. From this area, she tracks and completes all of the customer marketing tasks that keep her valued clients loyal. *ClientBase Windows* helps Dianne manage her schedule and "to-do" list so she is efficient at:

- Following-up and closing just about any travel lead that comes her way.
- Managing all of the tasks involved in planning a trip, including checking on payments, documents, waitlists, seating etc.
- Welcoming her customers home from their trips, as well as scheduling and managing on-going communications with her valued customers.

The way that Dianne begins her workday each morning tells you one of the reasons that she is a productive agent. The first thing she does when she signs into *ClientBase Windows* is click on the *Activities* tab. By default, *ClientBase Windows* queries the database for Dianne's Open Reminders and the Results Screen immediately displays a list of the Reminders (or tasks) she needs to complete today. She likes to plan ahead and it is becoming more and more apparent why Dianne is the most productive agent. It has taken less than one minute for Dianne to review and organize her day with the help of *ClientBase Windows*.

Steps for successfully implementing a basic Reminder & Res Card skills:

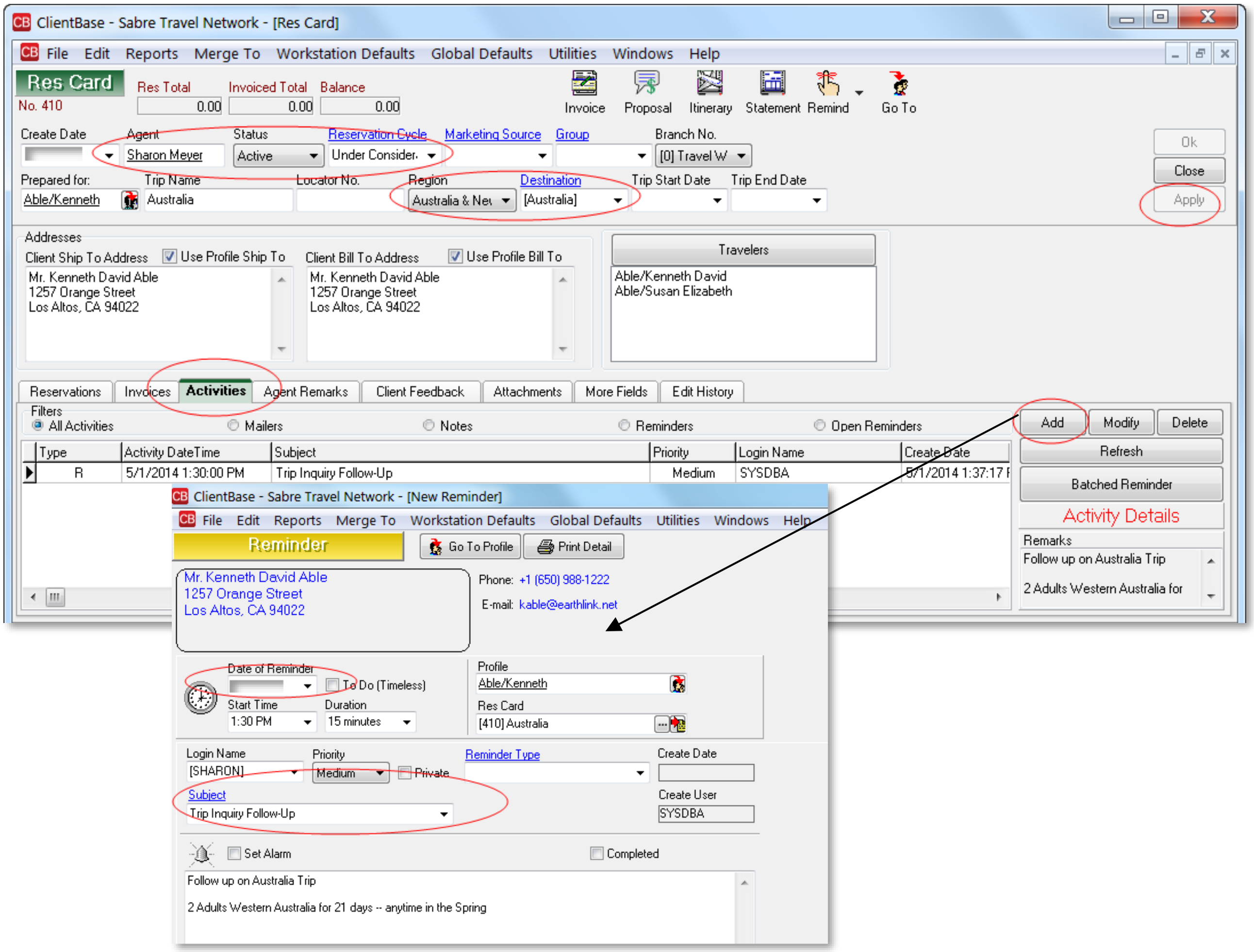
1. When a customer inquiries about a trip, query (search) for profile to update or create new profile, and click on Res Card icon on tool bar to create a new Res Card.
   - *Agent Name* required
   - Status *Active* defaults
   - Select *Reservation Cycle,* “Under Consideration” or “Lead”
   - Give trip a name & identify *Region* and *Destination*
   - *Apply* to save Res Card

2. Click the Activity Tab and Add to create Reminder for trip follow-up:
   - Set a follow-up date
   - Select subject, *Trip Inquiry Follow-up,* from drop-down menu
   - Use the alarm (optional)
   - Click *Refresh* to see newly created Reminder
   - Save Res Card

3. Every day open Activity Manager and your folder, *Open Reminders Only,* appear on your *To-Do List*.

4. Close a Reminder by either rescheduling it (if appropriate), or checking the *Completed* field. Click *Refresh* to take Reminder off your *To-Do List.*

Res Card with Activity Created, and suggested fields filled out:



Click Open Reminders Only Folder to see Reminders: