CC2 Capture

CRM to beat all CRMs

The **REALCONNECT CC2CAPTURE CRM** *is a powerful Sales Solution that is puposely developed for the Outbound Sales market. The system is expandable working well in an inbound, outbound or combination call-centre.*
As one of our satisfied customers commented,
"All the functionality is there – yet the system is so logical and simple to use."

CC2 Capture:

- ☑ *Versatility and power to create and maintain your own campaigns.*
- ☑ *Import leads and export sales to Excel.*
- ☑ *Ensure call backs are scheduled by CC2 and presented to Agents at the stipulated time.*

Functionality and Features

The system is simple enough for you to have all the control – yet powerful enough to create campaigns, control user access, allow for different user levels (agents, supervisors, verifiers, DBA's, etc), import leads, export sales and produce reports. In short – everything to create and manage your own campaigns – all without an IT department.

Create Users

Users are created with different levels. These levels impact what functions they may or may not use. Not all the user types are necessary, depending on the staff compliment and types of calls being handled.

Level	User Type	Functionality
1	Agent	Only access to client information.
2	Supervisor/Team leader	Monitor agent productivity.
3	Bank Verifier	Verify bank details for sales on any of the campaigns.
4	Sale Validator	Validate sales with the clients, ONLY after bank verification completed
5	Quality Control Assessor	Sort out queries by listening to voice log recordings
6	Call Centre Manager	Progress/stats reports, monitoring
7	Admin & CEO	Administrative tasks +Chief executive officer/Admin
8	IT/DBA	Database administrator

Create Campaigns

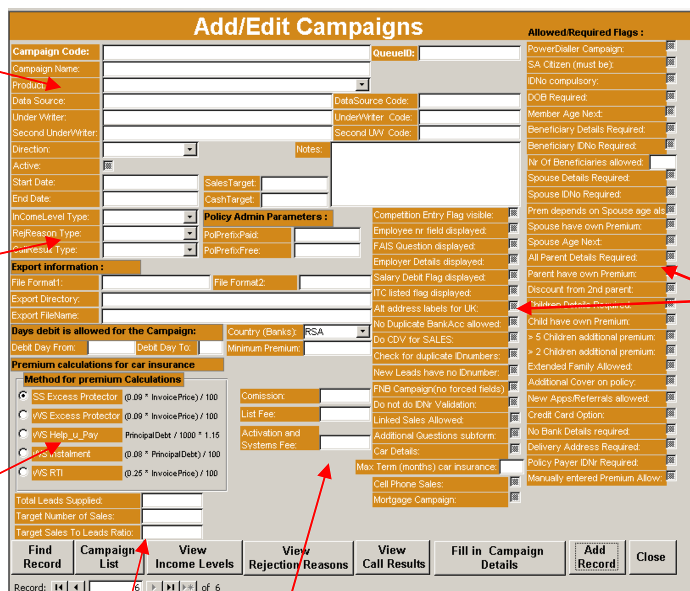
For personal insurance campaigns parent/spouse, extended family premiums, age ranges, etc can all be pre-selected. Also aspects like new age ranges, new member types and new covers can be created and new products added. The agents merely work off drop down menus and select the required values.

The manager can add new banks, cities, regions – you do not need to continually contact the developer. The solution comes standard with all the postcodes for South Africa with the relevant cities. You can select which call results to rework to new, for example a call with the result of "language barrier call" will automatically be designated as a new call.

Have many campaigns on one product or one campaign per product.

Create different call results, income groups, rejection reasons for each campaign or use the same for every campaign.

Formulae can be loaded to calculate premiums or a fixed premium can be allocated



Indicate required fields

Select the type of information fields you need for the campaign

Allocate targets and commission structures to each campaign.

Leads

New leads can be imported from an Excel spreadsheet supplied by your client. The leads for an entire campaign can be assigned to one agent or the leads distributed evenly between all the agents. If necessary, the leads can be reallocated to other agents. Agents may be made inactive for periods while they are on leave so no new leads will be assigned to them. The control is yours.

Export Sales

Sales can be exported to an Excel spreadsheet which you then send to your clients. Rejections from then can be imported into CC2 again. Once these are fixed, and flagged they will be exported to Excel again when the next batch of sales are exported.

Agents

If a lead cannot talk to an agent, the call can be rescheduled. Holidays are created in the system so agents do not re-schedule calls for those days. The agents can see what re-scheduled calls they have and how many sales they have made. An agent cannot skip leads hoping to find better or different clients. They have to work each lead before the system will give them their next lead.

Quality Control

All calls are recorded using the RealConnect **CT LOGGER** to which the CRM is linked. The CRM keeps track of every log file for each client. This makes it so much easier to find the voice log files you are looking for.

Bank & Sales Verification

The RealConnect CRM provides for verifiers to ensure the bank details provided by clients are correct and sales are valid. Only validated sales are exported to an excel spreadsheet which can then be sent to your client.

Reports

There are two types of reports:

System Reports

These reports identify duplicate account and credit card numbers, sales with no premiums, debit date deviations or other faults.

Operational Reports

These reports keep you up to date on aspects such as lead conversions per agents, sales summaries, campaign sales reports, etc.