For adviser use only

My Client Leads

Reference guide

April 2020

Contents

What you'll find in this guide

Introduction	**3**
The mechanics	**4**
Types of leads	**5**
How to access My Client Leads	**6**
Viewing leads	**8**
Viewing leads in detail	**9**
Taking action on a lead	**10**
Searching for leads	**11**
Requesting new leads	**12**
List of push leads	**13**
List of pull leads	**14**
Need help?	**15**

Introduction

My Client Leads is an award-winning relationship management tool available on MLC AdviserOnline.

My Client Leads provides you with prompts to have engaging conversations with your MLC MasterKey, MLC Wrap, Navigator, Protection*first* and MLC Business Super clients.

The leads provided via this tool can help you:

- identify new client opportunities
- build a stronger relationship with your clients
- assist in the retention of clients, and
- identify and act on changes in client behaviour or circumstances

My Client Leads is about giving you quality and timely information about your clients, and the flexibility and control over how you use that information.

The benefits of using My Client Leads include the potential to:

- turn a passive client/adviser relationship into an active relationship
- identify a cross sell opportunity
- reinforce your relationships with all clients, and
- save time finding leads and opportunities.

The mechanics

My Client Leads analyses customers and their account and transaction data to alert you to sales, retention, service and advice opportunities.

Every day, you will automatically receive up to five leads relating to a range of time-sensitive triggers ('push leads') such as Transition to Retirement.

These types of leads can include:

- a change in your client's account (change of name, address etc)
- a change in your client's circumstances (retirement birthday, large contribution etc)
- a reason to proactively contact your client (approaching retirement etc)

You can also ask for more leads which are less time-sensitive ('pull leads'). These leads include clients where there are cross selling opportunities.

My Client Leads is available to view on MLC AdviserOnline 24 hours a day.

Types of leads

Here you'll find further information on the two types of leads available for advisers—push and pull.

Push leads are time critical and are delivered automatically to you. They generally reflect a change in your clients' circumstances or an important date for your client. These leads will automatically appear on your MLC AdviserOnline home page each business day. See page 13 for a list of push leads.

Pull leads are those you can receive by request, subject to the criteria you've selected and availability. Although you can make multiple requests in a day to receive pull leads, we'll only process the last request that we receive on a business day before 8 pm. See page 14 for a list of pull leads.

Leads are generated across our entire suite of products, including:

- MLC MasterKey
- MLC Business Super
- MLC Wrap & Navigator.

How to access My Client Leads

Log into MLC AdviserOnline

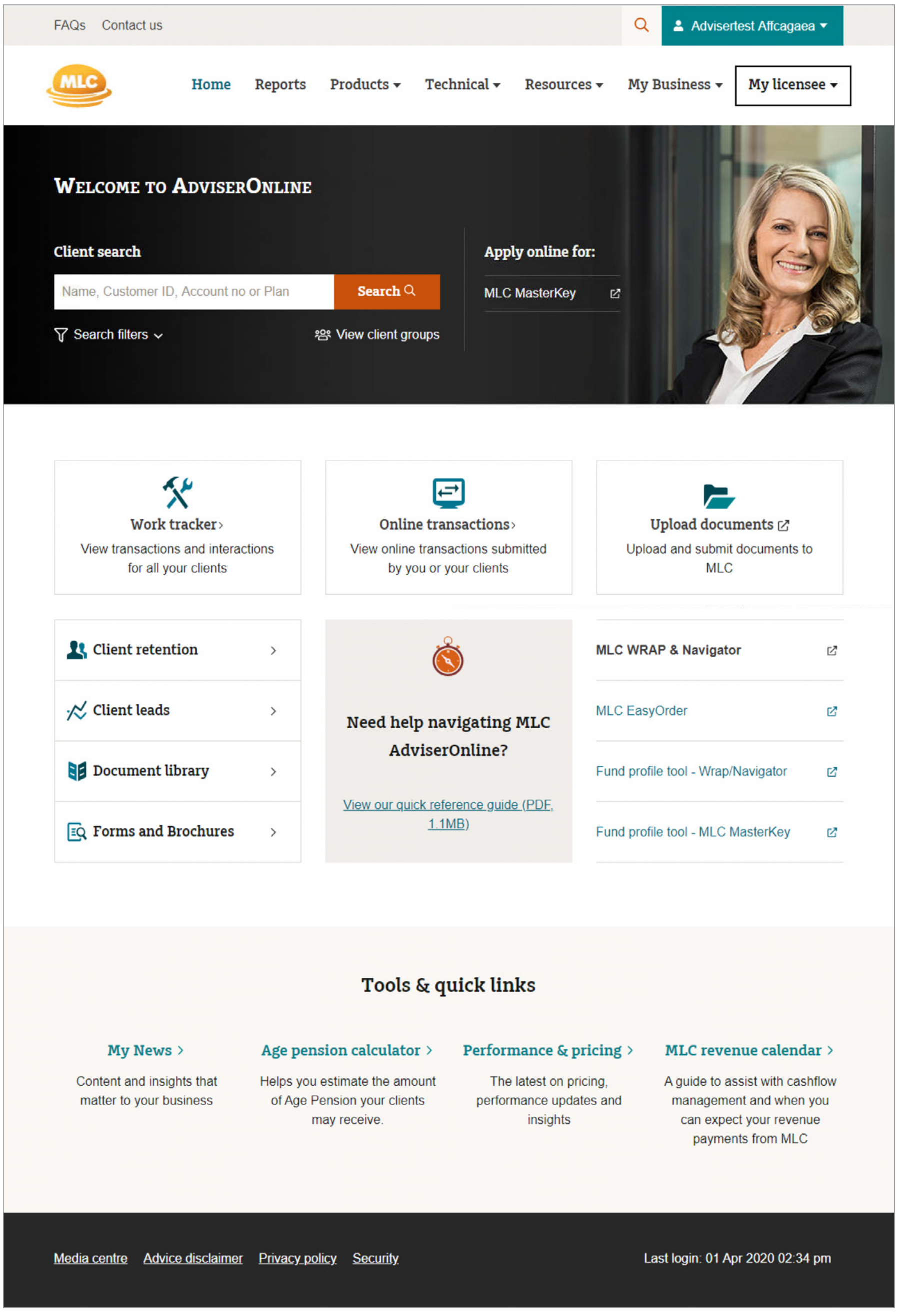
- Go to **mlc.com.au** and click **Login now**.
- Enter your username and password and click **Login**.
- Once you've logged into MLC AdviserOnline, the number of active leads will be displayed on the home page.
- To view all available leads, click **Client leads**.

Don't have secure access to mlc.com.au?

Please call us on **133 652**.

Forgot your password?

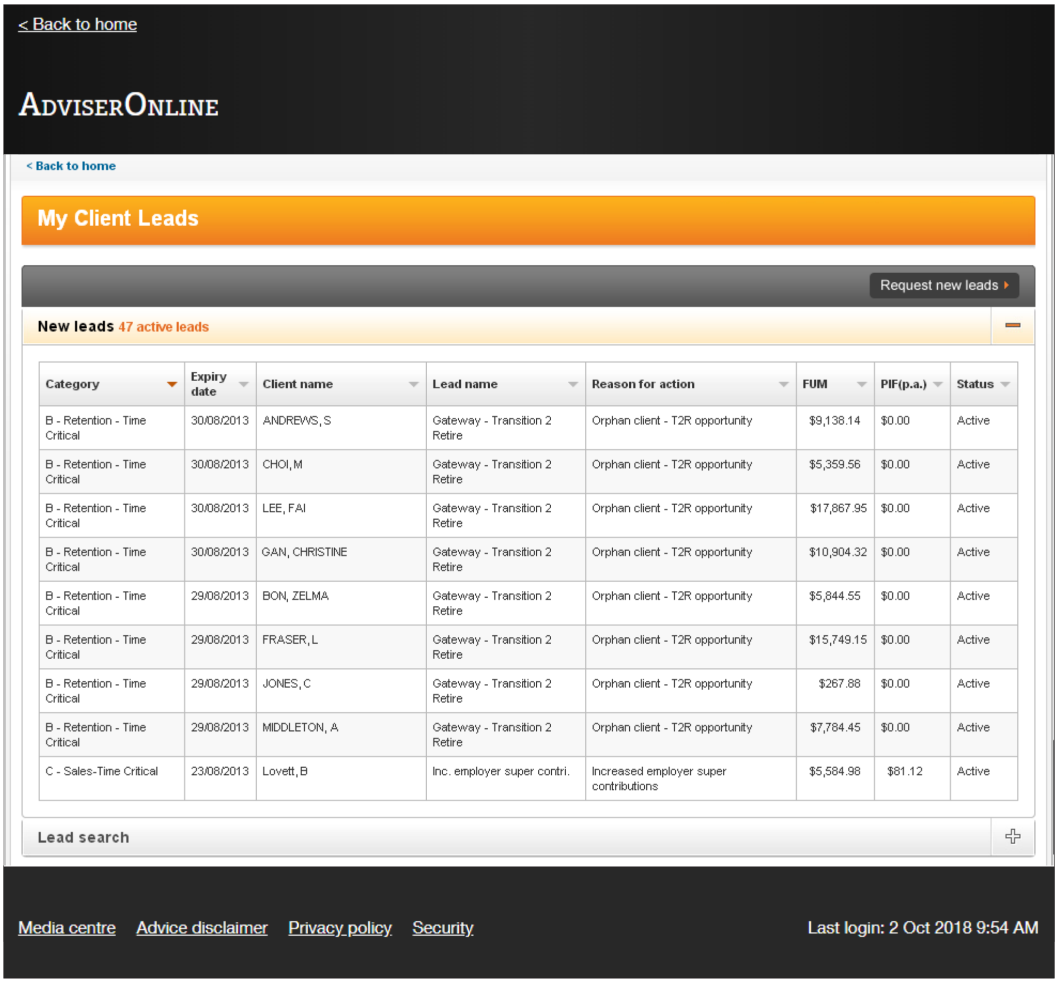
If you've forgotten your password, you can reset it online by visiting **mlc.com.au/login** and clicking **Forgot your password?**



How to access My Client Leads

Once you've clicked **Client leads**, you'll be taken to the My Client Leads homepage where all of your leads will be displayed. From here you'll be able to manage your leads as described further in this guide.

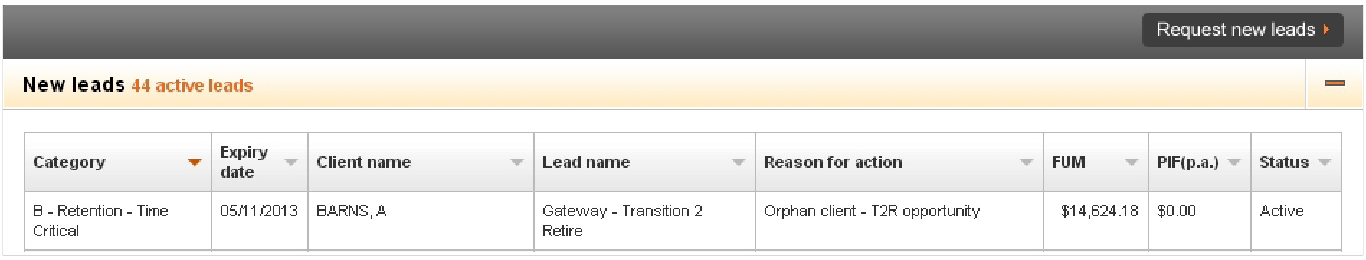
Click **< Back to home** to return to your MLC AdviserOnline home page.



Category	Expiry date	Client name	Lead name	Reason for action	FUM	PIF(p.a.)	Status
B - Retention - Time Critical	30/08/2013	ANDREWS, S	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$9,138.14	$0.00	Active
B - Retention - Time Critical	30/08/2013	CHOI, M	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$5,359.56	$0.00	Active
B - Retention - Time Critical	30/08/2013	LEE, FAI	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$17,867.95	$0.00	Active
B - Retention - Time Critical	30/08/2013	GAN, CHRISTINE	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$10,904.32	$0.00	Active
B - Retention - Time Critical	29/08/2013	BON, ZELMA	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$5,844.55	$0.00	Active
B - Retention - Time Critical	29/08/2013	FRASER, L	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$15,749.15	$0.00	Active
B - Retention - Time Critical	29/08/2013	JONES, C	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$267.88	$0.00	Active
B - Retention - Time Critical	29/08/2013	MIDDLETON, A	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$7,784.45	$0.00	Active
C - Sales-Time Critical	23/08/2013	Lovett, B	Inc. employer super contri.	Increased employer super contributions	$5,584.98	$81.12	Active

Viewing leads

Leads are displayed in order of Category by default, but can be displayed in alternative orders by clicking the arrow beside each column title.

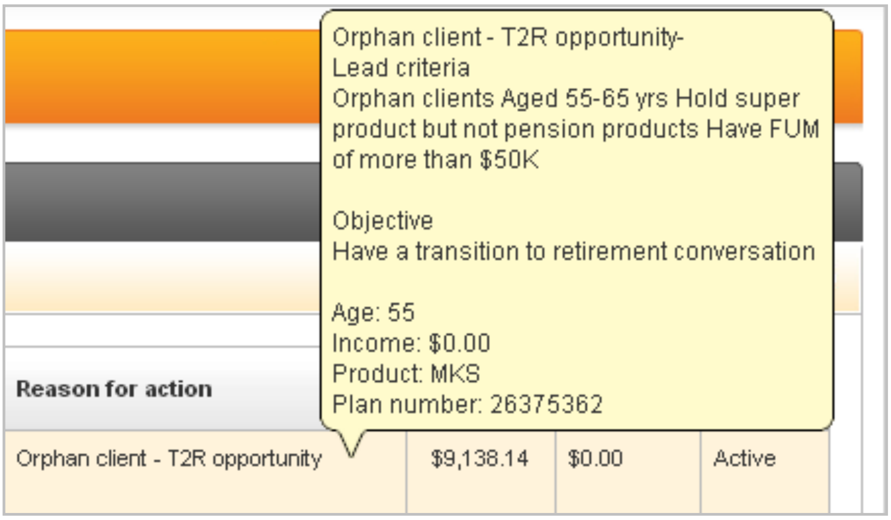

Request new leads

New leads 44 active leads

Category	Expiry date	Client name	Lead name	Reason for action	FUM	PIF(p.a.)	Status
B - Retention - Time Critical	05/11/2013	BARNS, A	Gateway - Transition 2 Retire	Orphan client - T2R opportunity	$14,624.18	$0.00	Active

You can see a summary of the lead details by hovering over the **Reason for action** column.

To view the leads in detail, click on a client.

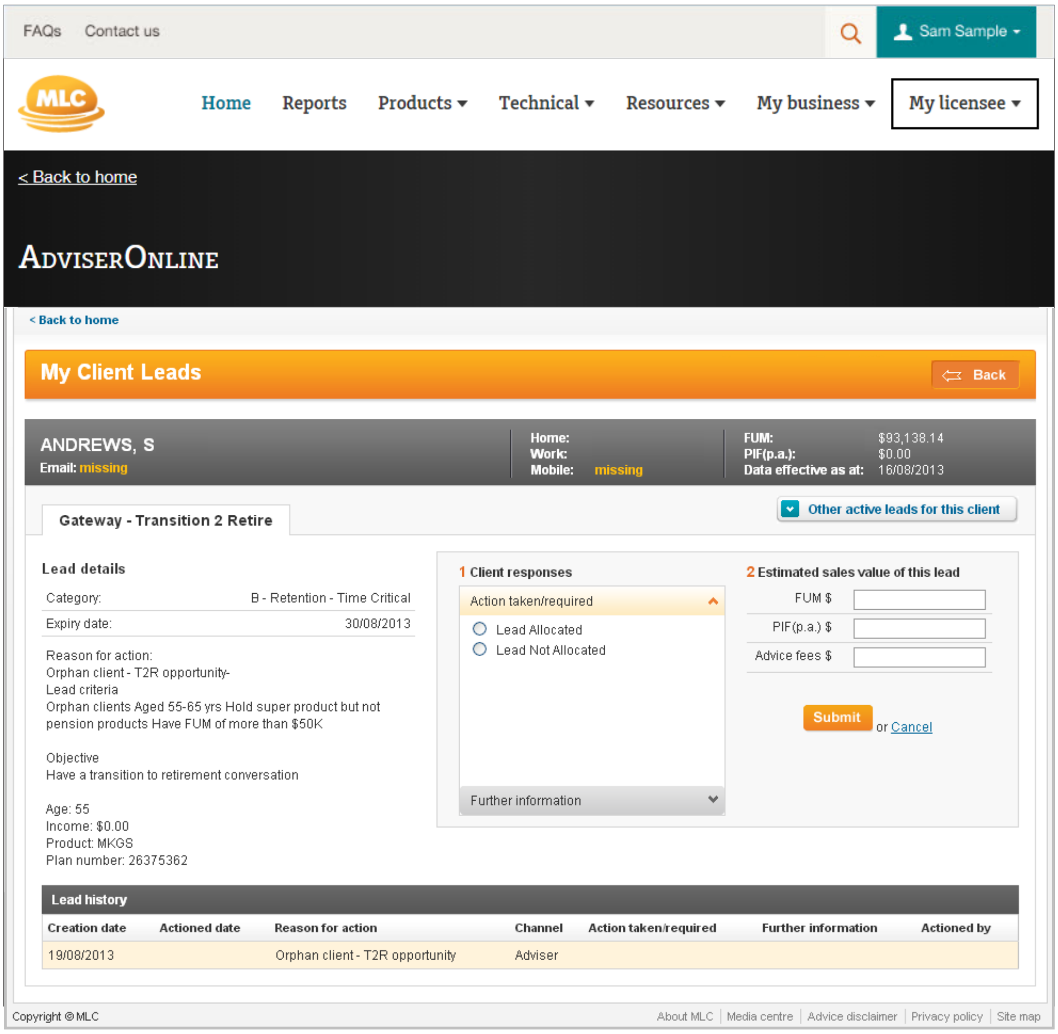


Viewing leads in detail

Your client's contact details are shown at the top of the page, together with their Funds Under Management (FUM).

Beneath this you'll find a detailed description of the lead followed by a history of any previous leads for your client.

To the right, you can select the action that you've taken with the lead and capture any sales details.



Taking action on a lead

You can record what action you've taken, or is required, with a lead by completing the **Client responses** section and entering any sales details.

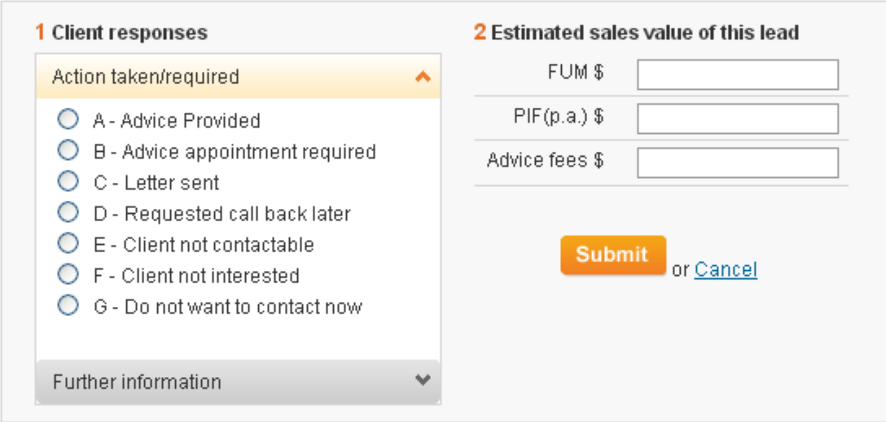
Actions include:

- advice provided
- advice appointment required
- letter sent
- requested call back later
- client not contactable
- client not interested
- do not want to contact now

Depending on the action selected, further information may be requested where you can record your intent to call the client, make an appointment or follow up the lead.

A lead will generally be displayed for 10 business days after it's been delivered to you. You'll find the expiry date shown in the lead's details.

If you don't action a lead before it expires, it'll be automatically closed and archived. However, you can search for expired leads (see page 11), or the lead may be re-sent to you if it remains relevant.



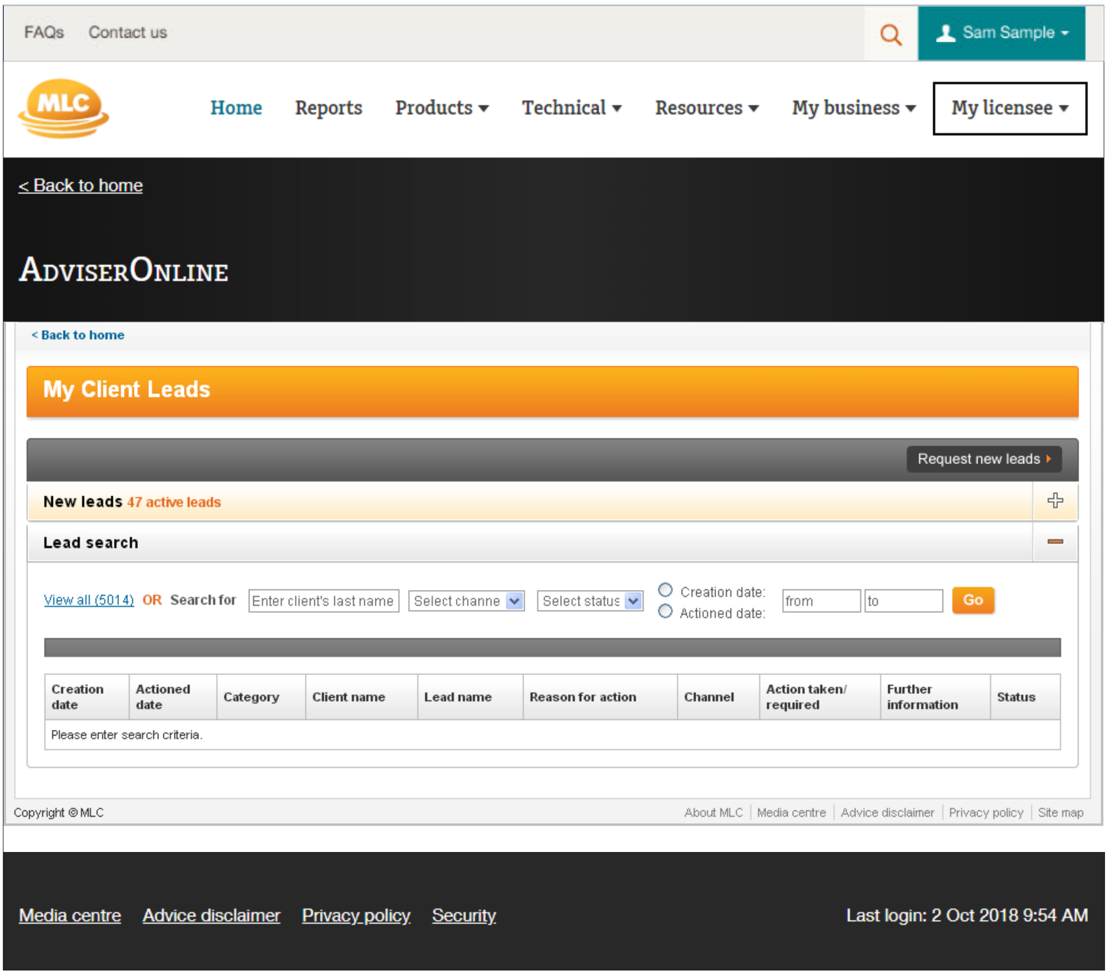
Searching for leads

You can search for specific leads using **Lead search**.

To access **Lead search**, scroll to the bottom of the My Client Leads homepage or collapse the **New leads** section by clicking the (-) symbol to bring Lead search into view.

Then, enter your desired search criteria keyword, channel, status, creation and/or actioned date and click **Go**.

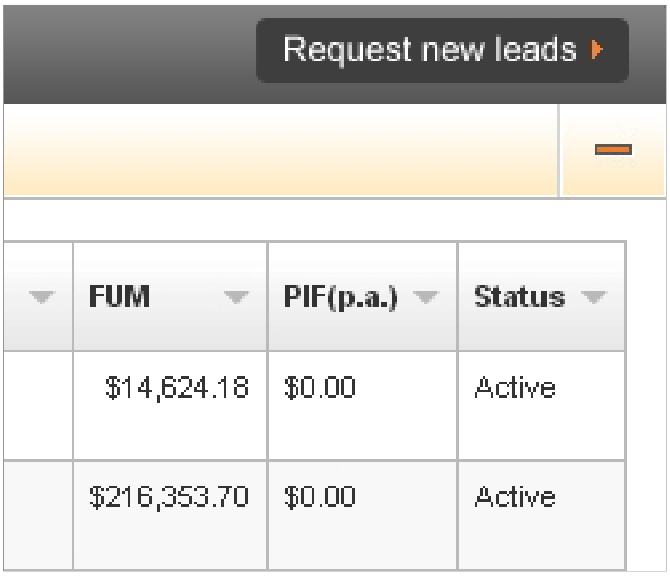
Lead search will locate active, submitted and expired leads. However, submitted and expired leads are 'view only' and you'll be unable to see that you've taken action by completing the response section.



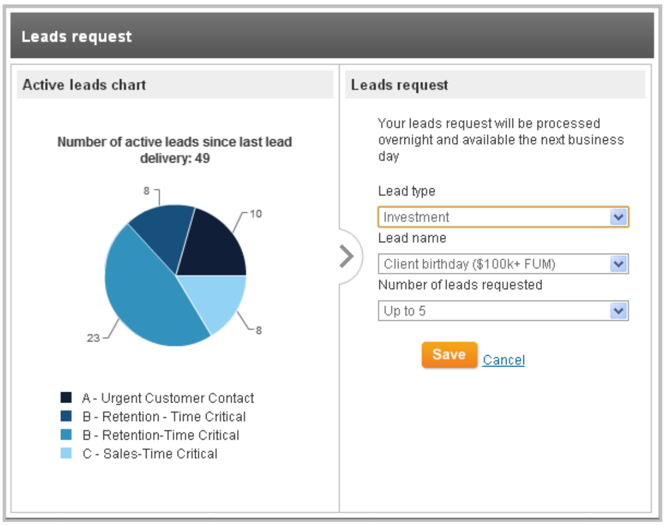
Requesting new leads

You can request new leads in 3 easy steps

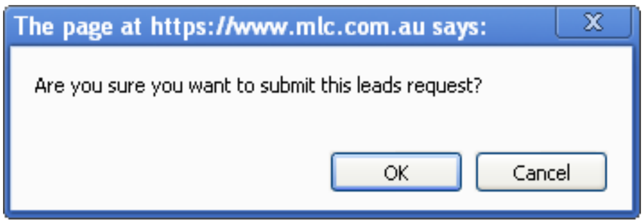
1. Click **Request new leads**.



2. Select the Lead type, Lead name and Number of leads you'd like, and click **Save**.



3. Click **OK** to confirm your request.



You'll then be returned to the **My Client Leads** homepage. Your new leads will be displayed the following business day subject to your request criteria and availability. If there are no new leads that fit the selected criteria, we'll send you an email to let you know.

List of push leads

Push leads are time critical and will be automatically delivered to you each day. Time-critical is defined as an approaching change in your clients circumstances or an important date (eg policy anniversary, retirement birthday).

Lead name	Lead type
Transition to retirement	Financial advice
Milestone birthday (sent 4 weeks prior)	Financial advice
Clients approaching 60 (sent 6 months prior)	Financial advice
Clients approaching 65 (sent 6 months prior)	Financial advice
Retirement birthday (sent 6 months prior)	Financial advice
New MKBS members	Corporate superannuation
Increased Employer Super Contributions	Investments
Substantial investment deposit	Investments
MLC MKBS member porting	Investments
Large corporate super balance	Financial advice
Large corporate super contribution	Financial advice

List of pull leads

Pull leads can be requested by selecting the **Request new leads** option (see page 12). These leads provide you with an opportunity to focus on a particular part of your business and control how many leads you'd like to receive.

Lead name	Lead type
Client birthday (>$100k FUM)	Investments
TD & FRF notification	Financial advice
Conservative investment option	Investment protection
Invested in cash or TD or FRF post 2008	Investment protection
Pension – Withdrawing 5% or more	Investment protection
T2R Client Growth	Personal superannuation

Please note: Even if we receive multiple lead requests in a business day, we'll only process the last request that we receive from you before 8 pm (AEST/AEDT).

Need help?

For further help with My Client Leads, please log into MLC AdviserOnline and click on **FAQs**.

Alternatively, call us on **133 652** between 8 am and 7 pm (AEST/AEDT) Monday to Friday.

For more information call us on 133 652

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