



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, Protectionfirst 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?**

FAQs Contact us

Advisertest Alfagaea

MLC Home Reports Products Technical Resources My Business My licensee

WELCOME TO ADVISERONLINE

Client search

Name, Customer ID, Account no or Plan Search

Search filters View client groups

Apply online for:

MLC MasterKey

Work tracker>
View transactions and interactions for all your clients

Online transactions>
View online transactions submitted by you or your clients

Upload documents
Upload and submit documents to MLC

Client retention>

Client leads>

Document library>

Forms and Brochures>

Need help navigating MLC AdviserOnline?

View our quick reference guide (PDF, 1.1MB)

MLC WRAP & Navigator

MLC EasyOrder

Fund profile tool - Wrap/Navigator

Fund profile tool - MLC MasterKey

Tools & quick links

My News>
Content and insights that matter to your business

Age pension calculator>
Helps you estimate the amount of Age Pension your clients may receive.

Performance & pricing>
The latest on pricing, performance updates and insights

MLC revenue calendar>
A guide to assist with cashflow management and when you can expect your revenue payments from MLC

Media centre Advice disclaimer Privacy policy Security

Last login: 01 Apr 2020 02:34 pm

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.

[< Back to home](#)

ADVISERONLINE

[< Back to home](#)

My Client Leads

Request new leads ▶

New leads 47 active leads

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

Lead search

[Media centre](#) [Advice disclaimer](#) [Privacy policy](#) [Security](#)

Last login: 2 Oct 2018 9:54 AM

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.


Reason for action			
Orphan client - T2R opportunity- Lead criteria Orphan clients Aged 55-65 yrs Hold super product but not pension products Have FUM of more than \$50K Objective Have a transition to retirement conversation Age: 55 Income: \$0.00 Product: MKS Plan number: 26375362			
Orphan client - T2R opportunity	\$9,138.14	\$0.00	Active


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.

[FAQs](#) [Contact us](#)  [Sam Sample](#)

 [Home](#) [Reports](#) [Products](#) [Technical](#) [Resources](#) [My business](#) [My licensee](#)

[< Back to home](#)

ADVISERONLINE

[< Back to home](#)

My Client Leads [Back](#)

ANDREWS, S
Email: **missing**

Home:
Work:
Mobile: **missing**

FUM: \$93,138.14
PIF(p.a.): \$0.00
Data effective as at: 18/08/2013

[Other active leads for this client](#)

Gateway - Transition 2 Retire

Lead details
Category: B - Retention - Time Critical
Expiry date: 30/08/2013
Reason for action:
Orphan client - T2R opportunity-
Lead criteria
Orphan clients Aged 55-65 yrs Hold super product but not
pension products Have FUM of more than \$50K
Objective
Have a transition to retirement conversation
Age: 55
Income: \$0.00
Product: MKGS
Plan number: 26375362

1 Client responses
Action taken/required
☐ Lead Allocated
☐ Lead Not Allocated
Further information

2 Estimated sales value of this lead
FUM \$
PIF(p.a.) \$
Advice fees \$
[Submit](#) or [Cancel](#)

Lead history

Creation date	Actioned date	Reason for action	Channel	Action taken/required	Further information	Actioned by
19/08/2013		Orphan client - T2R opportunity	Adviser			

Copyright © MLC [About MLC](#) [Media centre](#) [Advice disclaimer](#) [Privacy policy](#) [Site map](#)

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.

1 Client responses

Action taken/required

☐ A - Advice Provided

☐ B - Advice appointment required

☐ C - Letter sent

☐ D - Requested call back later

☐ E - Client not contactable

☐ F - Client not interested

☐ G - Do not want to contact now

Further information

2 Estimated sales value of this lead

FUM \$

PIF (p.a.) \$

Advice fees \$

Submit

 or [Cancel](#)

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.

[FAQs](#) [Contact us](#)



[Home](#) [Reports](#) [Products](#) [Technical](#) [Resources](#) [My business](#)

My licensee

[Back to home](#)

ADVISERONLINE

[Back to home](#)

My Client Leads

Request new leads

New leads 47 active leads

Lead search

[View all \(5014\)](#) OR Search for

Enter client's last name

Select channel

Select status

Creation date:

from to

Actioned date:

Go

Creation date	Actioned date	Category	Client name	Lead name	Reason for action	Channel	Action taken/required	Further information	Status
Please enter search criteria.									

Copyright © MLC

[About MLC](#) [Media centre](#) [Advice disclaimer](#) [Privacy policy](#) [Site map](#)

[Media centre](#) [Advice disclaimer](#) [Privacy policy](#) [Security](#)

Last login: 2 Oct 2018 9:54 AM

My Client Leads – Reference guide | 11

Requesting new leads

You can request new leads in 3 easy steps

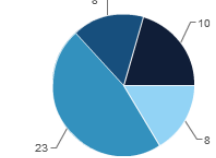
1. Click **Request new leads**.
2. Select the Lead type, Lead name and Number of leads you'd like, and click **Save**.

Request new leads ▶			
	FUM	PIF(p.a.)	Status
	\$14,624.18	\$0.00	Active
	\$216,353.70	\$0.00	Active

Leads request

Active leads chart

Number of active leads since last lead delivery: 49



■ A - Urgent Customer Contact
■ B - Retention - Time Critical
■ B - Retention-Time Critical
■ C - Sales-Time Critical

Leads request

Your leads request will be processed overnight and available the next business day

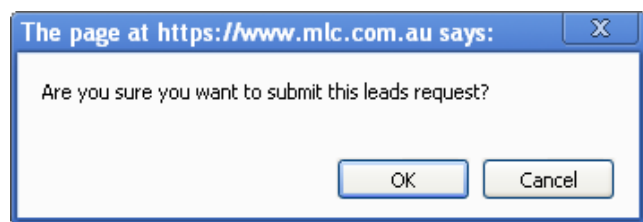
Lead type
Investment

Lead name
Client birthday (\$100k+ FUM)

Number of leads requested
Up to 5

Save [Cancel](#)

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**

Postal address

PO Box 200
North Sydney
NSW 2059

Registered office

Ground Floor, MLC Building
105–153 Miller Street
North Sydney NSW 2060

mlc.com.au