

# Using your Customer Admin Area - hints and tips.

## I've Just Signed Up Online – What Now?

First things first, welcome to Price Engines, and thanks for using our online sign up form!

The first thing we recommend you do is change your password. Do this by going to the 'Tools' section in the menu on the left and selecting 'Change Password'. Your password should contain letters and numbers, and be something you can remember easily. If you do forget your password, go to the Price Engines Website and click the 'I forgot My Password' link in the top right corner.

Before you can start collecting leads, you also need to make sure you've entered valid credit card details. This is found under the 'Finance/Billing' section, by clicking 'Manage Credit Cards'.

The last thing you need to do is decide what type of leads you would like to receive (do you want leads for Double Glazing, or for Solar Powered Heating, or Garage Conversions?), and what postcode areas you want to receive leads from. To choose what types of leads to receive, click on 'Account Details' and then 'Select Lead Types'. Click on a product in the 'Leads Available' menu, and then click and drag lead types into the box on the right. It's as simple as that, and changes take effect immediately.

To choose which postcode areas you wish to receive leads from, go to the 'Select Areas' page, again in the 'Account Details' section. Just like when selecting lead types, click and drag postcodes from the list into the box on the right.

Your account should now be set up, and you can begin collecting leads immediately. It's even possible that there may be some leads already on the Recent Leads Page, so it might be a good idea to check there straight away!

## How do I view my leads?

All your leads can be found on the Recent Leads Page. From there you can view the full details of each lead by clicking the 'call' button on the right. You can also send the lead to one of your delivery points (see below) by clicking the 'send' button.

## Can I forward my leads to a local office?

You can create and manage several different forwarding addresses (called delivery points) using the Delivery Points page. Once you have addresses set up, you can use the 'send' button on the Recent Leads page to send leads on to one of your delivery points.

## Can I find out what my customers been saying about me?

We give customers the opportunity to write feedback on the companies who they've found through us, and you can have a look at what they're saying on the View Feedback Page. If you feel a customer has been unfair or unjustified in their feedback, don't hesitate to contact us and let us know how you feel.

## Want to know more?

For more helpful tips and advice, visit the 'Help' section (from the left-hand menu on your Admin page) and select either FAQ's or our new forum facility where you can view past posts, reply to any posts or create your own post. It's only viewable by other companies in our network and you'll only be identified by your 4 digit user name. Of course, you can call or email our office at any time if you need to.

## How we generate and qualify our sales leads.

We take pride in the quality of our leads, and to understand why, you should understand the story of a lead - how a homeowner reaches us, how we process their information, how companies are selected for lead delivery and how it winds up in your delivery area.

### Online generation

- Homeowners visiting our Quoter sites are invited to enter their contact details to proceed to the online pricing system. They enter their own measurements and requirements. When they are finished they are given an instant online price guide.

### Verification by our professional telesales team

- Around twenty minutes later the Price Engines telesales team call to confirm the contact details and the job requirements. They offer the homeowner the chance to get an appointment from up to three of our registered and approved home improvement companies.

### Matched to 3 companies from our database

- If the homeowner agrees, their details and requirements are matched against our database of companies. No lead is ever matched to more than 3 companies.

### Delivered online, and by SMS, fax or email

- Once matched, the lead appears in the online delivery area of each of the matched companies, and they'll receive notification of a new lead by their chosen method - text, fax or email. When we pass a lead on to you, we make sure that you know every detail that we know about that lead.

### Followed up by email to ensure the highest quality service

- The homeowner is given a list of the companies that their details have been passed to, so that it won't be a surprise when you call them.
- After seven days, we email the homeowner to ask them to leave feedback on the companies we matched with them. This feedback is taken into account when matching homeowners to companies in the future. You can view any feedback left by your customers on your Customer Admin Area.

We follow this stringent process for every online or phone enquiry we receive, whatever the product or service. Our telesales teams work 9.30am to 8.30pm and our lead delivery system is live 24/7 so you can be assured you're receiving the sales lead as quickly as possible - while they're still red hot.

## Getting more leads.

Hopefully your only problem will be not enough leads! When the next lead comes into the system our computer system performs an auction to decide which three companies it should be batched against. In most areas of the country for most products we are oversubscribed. The factors we use to decide which companies get priority in lead allocation are:

- **Quality Feedback Score** - We follow up every lead and ask homeowners to tell us (and you!) how well they think you did. We pass more leads to customers with the highest feedback scores.
- **Return Rate** - Customers who have fewer leads credited or replaced are more likely to receive more leads.
- **Payment History** - Companies whose accounts are up to date are placed above those that aren't!
- **Postcode Areas** - Have you selected all the part postcodes that define your area?
- **Profile and offers** - Complete your company profile and keep offers up to date - we use this information to guide our marketing.
- **Weekly Limit** - Your account allows you to specify a weekly cap. By increasing this figure, it tells us that there's more demand for leads in those areas.
- **Missed Lead Report** - Watch out for Missed Lead Reports emails, which will tell you of potential leads you've missed in the last 7 days.
- **Account Balance** - Make sure there's sufficient balance on your account or a saved credit card, to ensure no disruption to your lead delivery.

## SMS reference.

You can interact with your account in a number ways, directly via SMS text message.

Text the following messages to **07800 140 047**. The mobile number you send from must be the mobile number registered on your account for SMS updates / alerts.

*\*substitute 1186 for your own account number in the following examples:*

- **5 MORE** - Add 5 leads to your weekly limit (can be any number of leads).
- **1186 5 MORE** - Add 5 leads to weekly limit for account 1186 (can be any number of leads).
- **1186 LIVE** - Set account 1186 live.
- **1186 OFFLIVE** - Set account 1186 off live.
- **1186 STATUS** - Get back a text message with your account status and lead delivery details.
- **Telephone Number Post Code Lead Ref No.** - name, address, postcode and phone number of the most recent lead delivered to any account associated with the sender's mobile number and matching the specified number, postcode or lead reference.
- **ACCOUNTS** - Get back a text message with all the account references containing the sender's mobile number.

## Getting the best value from your leads.

We don't tie any customer to a minimum contract. We have no 'notice period'. If you feel that you're not getting an excellent rate of return from our leads then we'd hardly be surprised if you turned your account off!

We have many hundreds of customers who have bought our sales leads for 10 years or more. Here are some of the things we know they do well:

- **Contact the lead immediately** - We have just had a conversation with the customer during which they've asked for contact from a maximum of three reputable companies. The second you receive your text message, email or fax to say this lead is available - call the customer.
- **Don't withhold caller ID** - Some people don't like to answer the phone to people who withhold caller ID. If they don't answer your call that's a wasted lead!
- **Don't pressure** - Obviously every company has its own qualification standards. The more qualification you place on the appointment criteria, the narrower you make your sales funnel.
- **Control quality** - It is good practice to record the conversations you have with customers so you can improve your technique, training and success rate
- **Try alternative times** - If you didn't speak to the customer straight away, then it's quite possible that the customer is going about their daily life and, like all of us, are only available to be contacted at certain times. We always ask the customer what the best times to contact are and will put this on the lead if necessary.
- **Try different ways** - Some customers respond well to emails or text messages. Successful strategies will use all possible contact methods.
- **Continue the conversation** - Every lead we pass you contains the name of the person in our call centre who spoke with that homeowner. Homeowners can be suspicious of callers - particularly if they've had a bad experience in the past - so continuing the conversation where we left off will often help.
- **Get your areas right** - Leads have not all got the same value to you. Leads that are a long way away, or in certain, weaker areas of your territory will give you a lower return on investment. Making sure your postcode areas are correct will make a big difference.
- **Get the right products** - We have over 50 product categories, use this flexibility to select the products that will yield you most margin.
- **Brief your reps** - If you don't call the leads centrally, and pass them to reps to call, make sure those reps are aware of all these points.
- **Keep offers up-to-date** - Make sure your profile page is maintained accurately and has current, relevant offers.
- **Don't neglect your other marketing** - It's not unusual for homeowners to do their own checks on you before they accept an appointment. If your website and other marketing are not appealing you will miss out on potential appointments.

# Quality control

## Understanding & getting the most out of our quality control & returns process.

With the best will in the world, no company can never produce products that are 100% without defects but we also have to be very clear we have an understanding about what our service provides.

### What we do sell.

We sell contact details of individuals who we have spoken to in the past few hours or minutes who have registered an interest in buying the products you supply, and have agreed to us passing their details on to a maximum of 3 companies with a view to them making contact and arranging an appointment. We sell:

- **Valid information** - every lead will have a correct, properly formatted address and contact telephone numbers and written notes that are correct.
- **Homeowner Status** - they will be homeowners or the decision maker and payer if not.
- **Price Conditioning** - they will have seen or discussed a realistic price level for the works required before agreeing to see companies.
- **Correct Products** - we find out what the customer wants and this will match the products you tell us you want to sell.
- **Correct Location** - our leads are matched by postcode. If you tell us you only want leads in AB17 postcodes - that's all we'd provide.
- **Informed Consent** - we go out of our way to make sure the homeowner understands what is happening and will be expecting your call.
- **Data Protection** - we close the call with confirming with the customer that they would like us to pass their details to you.
- **Passed to 3 companies** - we never pass lead details to more than 3 companies.

### What we don't sell.

While we take all possible care to ensure our leads are all the things above - what we cannot guarantee are the things outside our control. We can't sell:

- **Guaranteed Sale!** - We'd love to pass all our customers leads that always turn into a sale.
- **Guaranteed Appointments** - Your ability to make an appointment depends on your professionalism, speed of contact, local reputation, and qualification procedures.
- **Guaranteed Contact** - The details we passed you should be correct, but we can't guarantee that you will contact the customer! This very much depends on you.

With all that understood, we are passionate about providing the highest possible quality of sales lead. If you feel that a lead hasn't been qualified and prepared to the quality that you expect of us - we want to know about it!

You can return any lead for investigation via your online delivery area. When you do we will reinvestigate the call, crucially re-listening to the conversation we had with the customer. If we have made any mistake and the lead isn't what we have said (see above) it would be, we would credit that lead without question.

## **Price Engines - Directory of contacts:**

<b>Sales</b>	Tel: 01283 707053 Email: sales@priceengines.co.uk
<b>General Office</b>	Tel: 01283 707050
<b>I.T Department</b>	Tel: 01283 707056 Email: support@priceengines.co.uk
<b>On the Web:</b>	<a href="http://www.priceengines.co.uk">http://www.priceengines.co.uk</a>

**Please Note - New Address:** Pioneer House, Derby Road, Stenson, Barrow-on-Trent, Derby, DE73 7HL

## **Your Customer Admin Area:**

Your customer admin area is where you will receive and manage your Price Engines leads. It is online at <https://delivery.priceengines.co.uk>. You'll need your 4 digit user name and your password, which you should have received by email when you signed up.

Alternatively, you can go to <http://www.priceengines.co.uk> and click on the link in the top right hand corner of the page which says 'login to your customer area'. You'll still need your four digit user name and your password.

If you forget your password, click on the 'Forgot your Password?' link directly below the login link on the Price Engines website. We will email you a password reminder email straightaway.

## **The Quoter family of websites.**

You can see all our current Quoter websites in action on our Home Improvement Quotes website, <http://www.homeimprovementquotes.co.uk>. Please feel free to try any quoter website for yourself.

## **Price Engines Affiliate Scheme.**

Do you generate your own sales enquiries? Do those enquiries sometimes fall outside of your working area, or involve products or services you don't offer? We have a money making solution for you.

Once you've joined our network of companies, you'll notice on your Customer Admin' Area a section called Affiliate Tools.

From there, you can submit any self-generated enquiry back to Price Engines Ltd. Just type the relevant information in the spaces provided and we'll do the rest.

We pay £5 for every time we place one of your leads with one of our approved home improvement companies and as we submit each lead to a maximum of three companies, you could earn up to £15 for ever lead you supply.

You can check the status of your Affiliate account by using the options under Affiliate Tools in your Admin' Area. We'll either pay by cheque or credit existing invoices.

To make it even easier for you to earn money form your own website, we've also created a number of affiliate buttons and widgets, which you can add to your own website.

### **I don't have a button or widget but I have a lead to submit...**

That's fine. Use the 'Submit a Lead' form under Affiliate Tools and hand submit the lead information. The lead will be accredited to the account you're using at the time of submission.

### **Who is the cheque made payable to?**

Cheques are made payable to the current name on the account and sent to the current address so it's important to make sure these details are correct. (see under Account Details).

### **Does my account have to be 'On' or live for you to accept my affiliate leads?**

No - the 'On' button on the home page of your Customer Admin' Area only affects you receiving sales leads from us. You do not have to be 'live' to submit leads or earn money from them.