



Client Segmentation Training Manual

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1.0 INTRODUCTION

The object of this manual is to give you the ability to apply/update; Servicing Arrangements, Marketing Segments, Case Statuses & Servicing Advisor, in bulk and to tens, hundreds or thousands of clients quickly and easily by whichever criteria you wish.

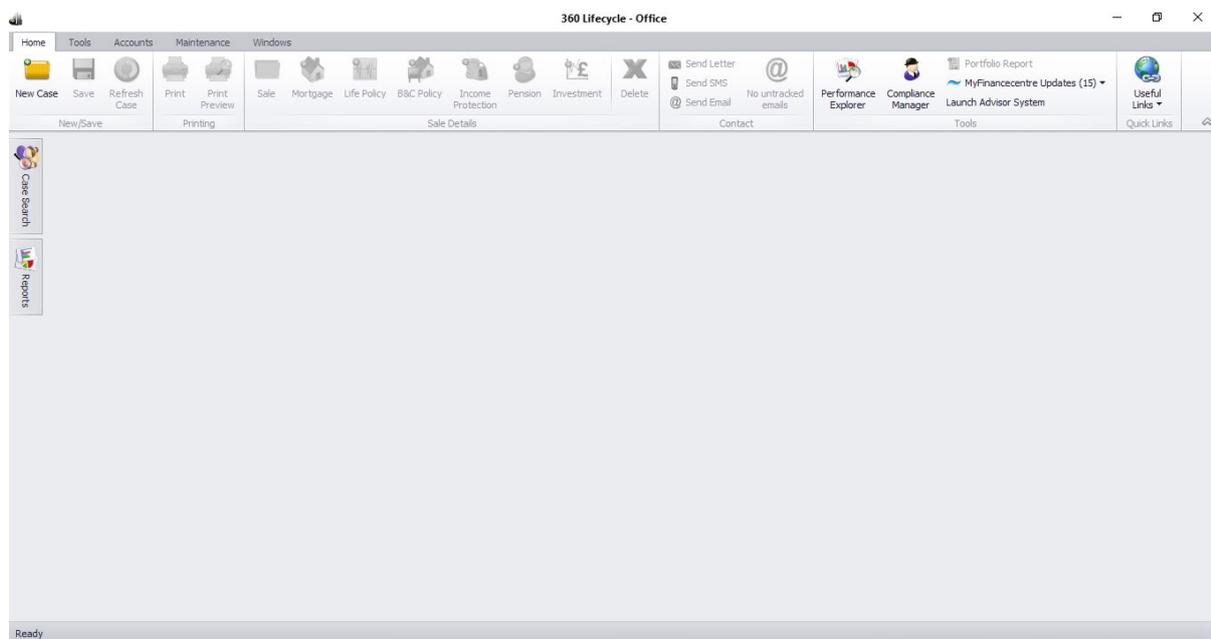
Using this facility to apply a Servicing Arrangement will then create automatic client servicing reviews in the adviser's Hotbox to action and ensure you have a complete audit trail against your client file. This is a huge benefit for ensuring RDR rules are maintained and useful for potential forthcoming MMR impacts.

You can use this facility to apply a 'marketing segmentation group' to any number of records at one time to clearly identify groups of specific clients for marketing through Campaign Manager. Should you have Orphan clients, you are able to allocate a new servicing adviser to these clients by your selected criteria.

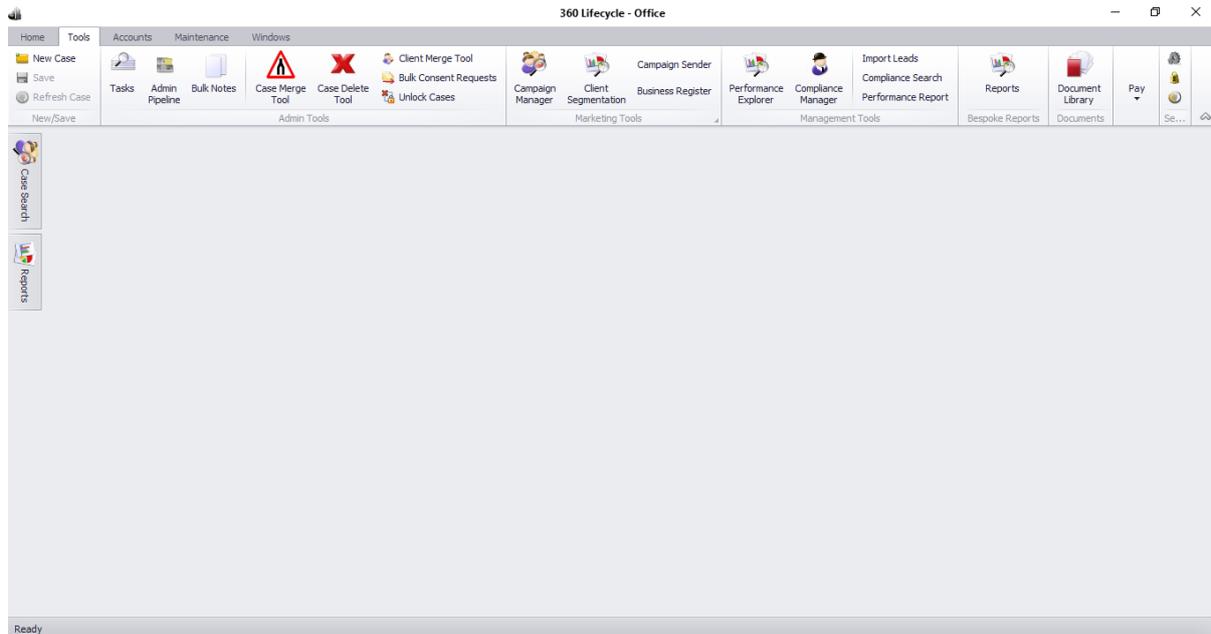
2.0 GETTING STARTED

2.1 Landing Screen (Office)

Once you have logged in and loaded 360 Office, you will arrive at the Landing Screen.

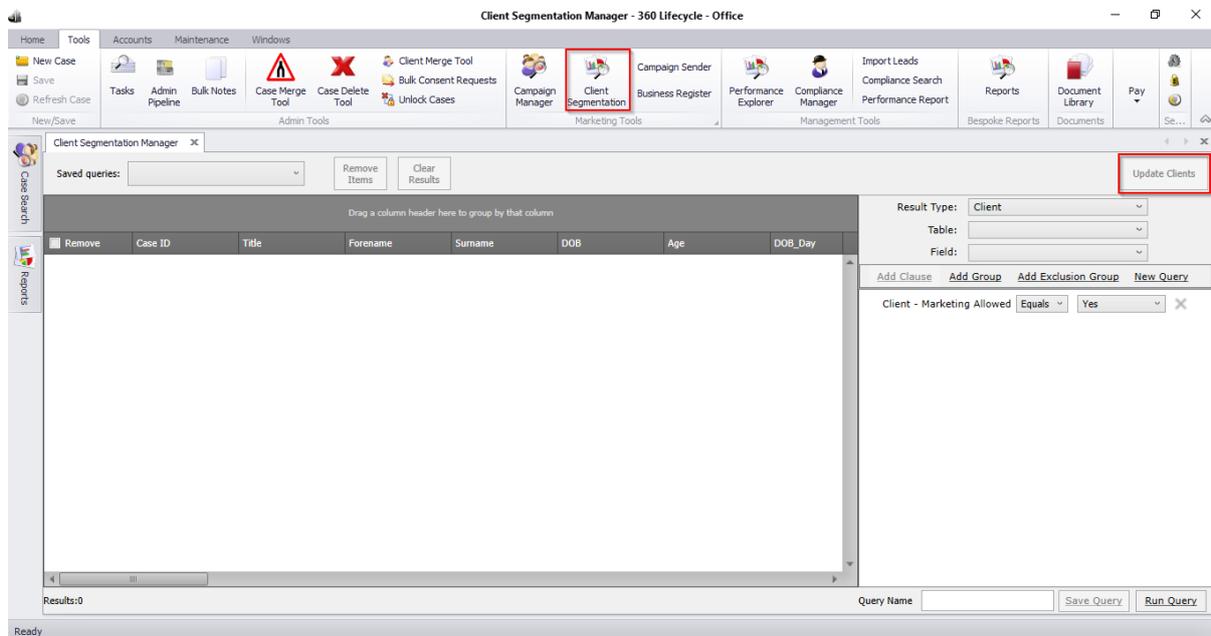


From here you need to select Tools which will show multiple icons to choose from.



2.2 Landing Screen (Client Segmentation)

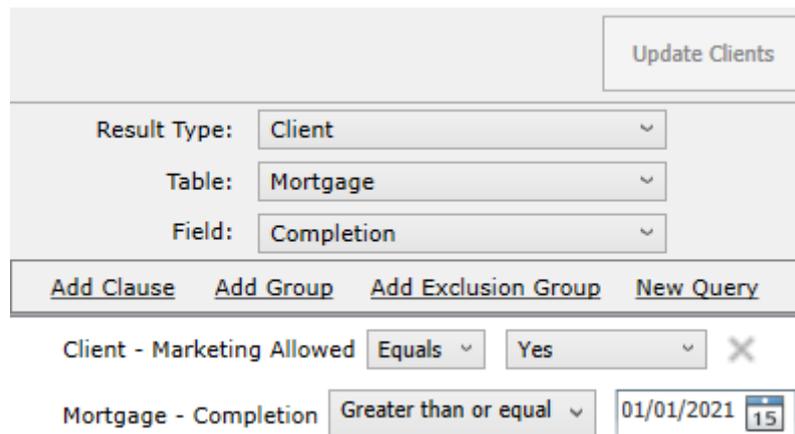
Now, simply select **Client Segmentation**. Once loaded, you will see a layout similar to that of Campaign Manager. The only notable difference at this stage is that instead of there being an option to **Create Campaign**, you have **Update Details** instead.



2.3 Using Query Builder

To begin your query, first you will need to work out what your target data is. Once you have decided this, you can then search for that data by specifying an exact criteria.

To the right of the screen, you will see a number of options that work together.



The screenshot shows a query builder interface with the following elements:

- An "Update Clients" button in the top right corner.
- Three dropdown menus: "Result Type" set to "Client", "Table" set to "Mortgage", and "Field" set to "Completion".
- A horizontal bar with four buttons: "Add Clause", "Add Group", "Add Exclusion Group", and "New Query".
- Two active filter clauses:
 - "Client - Marketing Allowed" with a dropdown set to "Equals" and a value dropdown set to "Yes".
 - "Mortgage - Completion" with a dropdown set to "Greater than or equal" and a date picker set to "01/01/2021".

It is recommended that most Client Segmentation queries will be ran with Result Type as Client.

Select Table = This is the 'Table' or section of the database you would like to query i.e. WHETHER YOU WANT TO RUN QUERIES ON CLIENT, CASE OR A SPECIFIC POLICY TYPE INFORMATION.

Select Field = SELECT THE SPECIFIC DATA ITEM YOU WANT TO QUERY BASED ON THE TABLE SELECTED. The Field pick list items you can choose from vary, depending on the Table selected.

Add Clause = This is an AND statement e.g. "Case has a Servicing Advisor of X"

Add Group = This is an OR statement e.g. "Case has a Servicing Advisor as X OR Y"

Add Exclusion Group = THEY DO NOT HAVE e.g. "Find all cases that **DO NOT** have a Servicing Arrangement of Gold"

Each layer you want to add onto your query you need to amend the **Select Table and Select Field** and click on **ADD Clause, Group** or **Exclusion Group**.

2.4 Running A Query

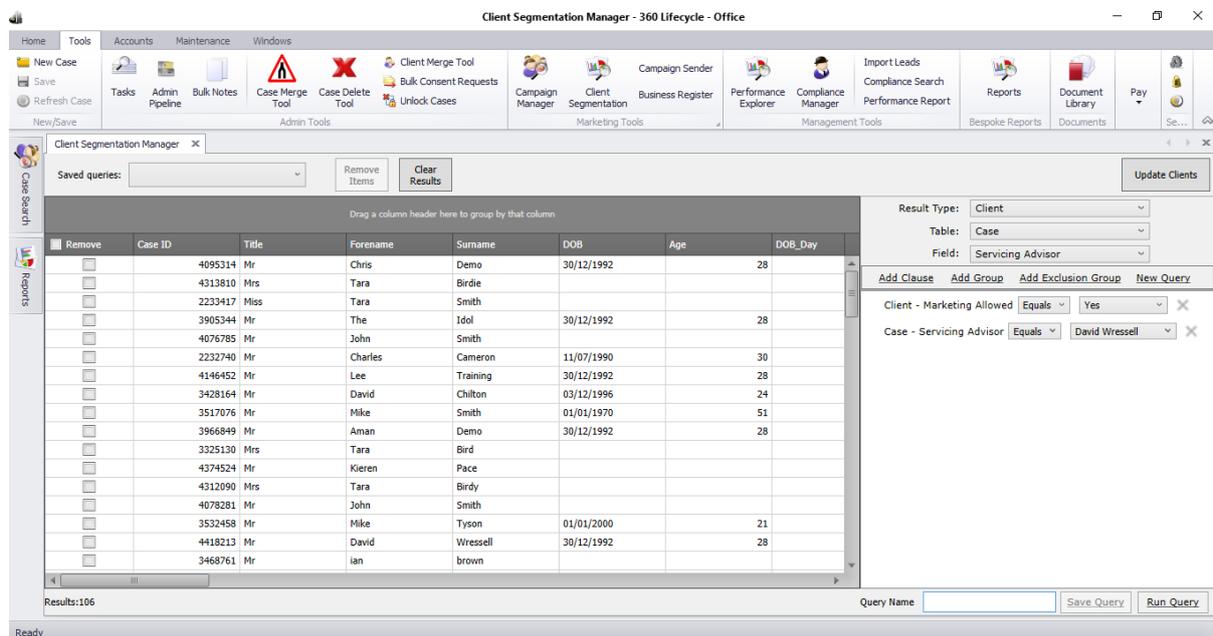
We have listed some example scenarios to show how the logic is applied, enabling you to build your own queries and update clients/cases. Please note that you can **Run Query** at any point within the campaign building process to see the number of clients/cases who are returned and how this changes as more criteria is added.

2.4.1 Example Query 1 – List all clients with a particular Servicing Advisor and then move these clients to another Advisor.

First, select **Client** under the Table column and then **Servicing Advisor** in the Field column.

Once you have done that you now need to select **Add Clause** ensuring that *Equals* appears from the drop-down menu and finally select the Advisor name from the Advisor List. Please note that **Client – Marketing Allowed** will always appear by default, this you can ignore.

From here, you can run the query by simply selecting **Run Query**. Once the system has finished loading, the results to show you the clients/case records allocated to that Advisor will be displayed.



The screenshot shows the 'Client Segmentation Manager - 360 Lifecycle - Office' application. The main window displays a table of client records with columns: Case ID, Title, Forename, Surname, DOB, Age, and DOB_Day. The table contains 16 rows of data. To the right of the table is a configuration panel with the following settings:

- Result Type: Client
- Table: Case
- Field: Servicing Advisor
- Buttons: Add Clause, Add Group, Add Exclusion Group, New Query
- Query Logic: Client - Marketing Allowed Equals Yes
- Query Logic: Case - Servicing Advisor Equals David Wressell
- Buttons: Update Clients, Save Query, Run Query

At the bottom left, it shows 'Results:106' and 'Ready'.

Remove	Case ID	Title	Forename	Surname	DOB	Age	DOB_Day
<input type="checkbox"/>	4095314	Mr	Chris	Demo	30/12/1992		28
<input type="checkbox"/>	4313810	Mrs	Tara	Birdie			
<input type="checkbox"/>	2233417	Miss	Tara	Smith			
<input type="checkbox"/>	3905344	Mr	The	Idol	30/12/1992		28
<input type="checkbox"/>	4076785	Mr	John	Smith			
<input type="checkbox"/>	2232740	Mr	Charles	Cameron	11/07/1990		30
<input type="checkbox"/>	4146452	Mr	Lee	Training	30/12/1992		28
<input type="checkbox"/>	3428164	Mr	David	Chilton	03/12/1996		24
<input type="checkbox"/>	3517076	Mr	Mike	Smith	01/01/1970		51
<input type="checkbox"/>	3966849	Mr	Aman	Demo	30/12/1992		28
<input type="checkbox"/>	3325130	Mrs	Tara	Bird			
<input type="checkbox"/>	4374524	Mr	Kieren	Pace			
<input type="checkbox"/>	4312090	Mrs	Tara	Birdy			
<input type="checkbox"/>	4078281	Mr	John	Smith			
<input type="checkbox"/>	3532458	Mr	Mike	Tyson	01/01/2000		21
<input type="checkbox"/>	4418213	Mr	David	Wressell	30/12/1992		28
<input type="checkbox"/>	3468761	Mr	ian	brown			

Result Type:	Client	▼
Table:	Case	▼
Field:	Servicing Advisor	▼
Add Clause Add Group Add Exclusion Group New Query		
Client - Marketing Allowed	Equals	Yes
Case - Servicing Advisor	Equals	David Wressell

Once the results are displayed, to transfer all of these clients/case records to another advisor, simply choose the option **Update Clients** and select **Servicing Advisor** from the drop-down menu.

Client Segmentation Wizard ✕

Your Selection

Please select the appropriate action / field to change for the choices below and, if prompted, select an entry from the dropdown list.

- Marketing Segmentation
- Client Servicing Arrangement
- Servicing Advisor
- Case Status
- MFC Invitations

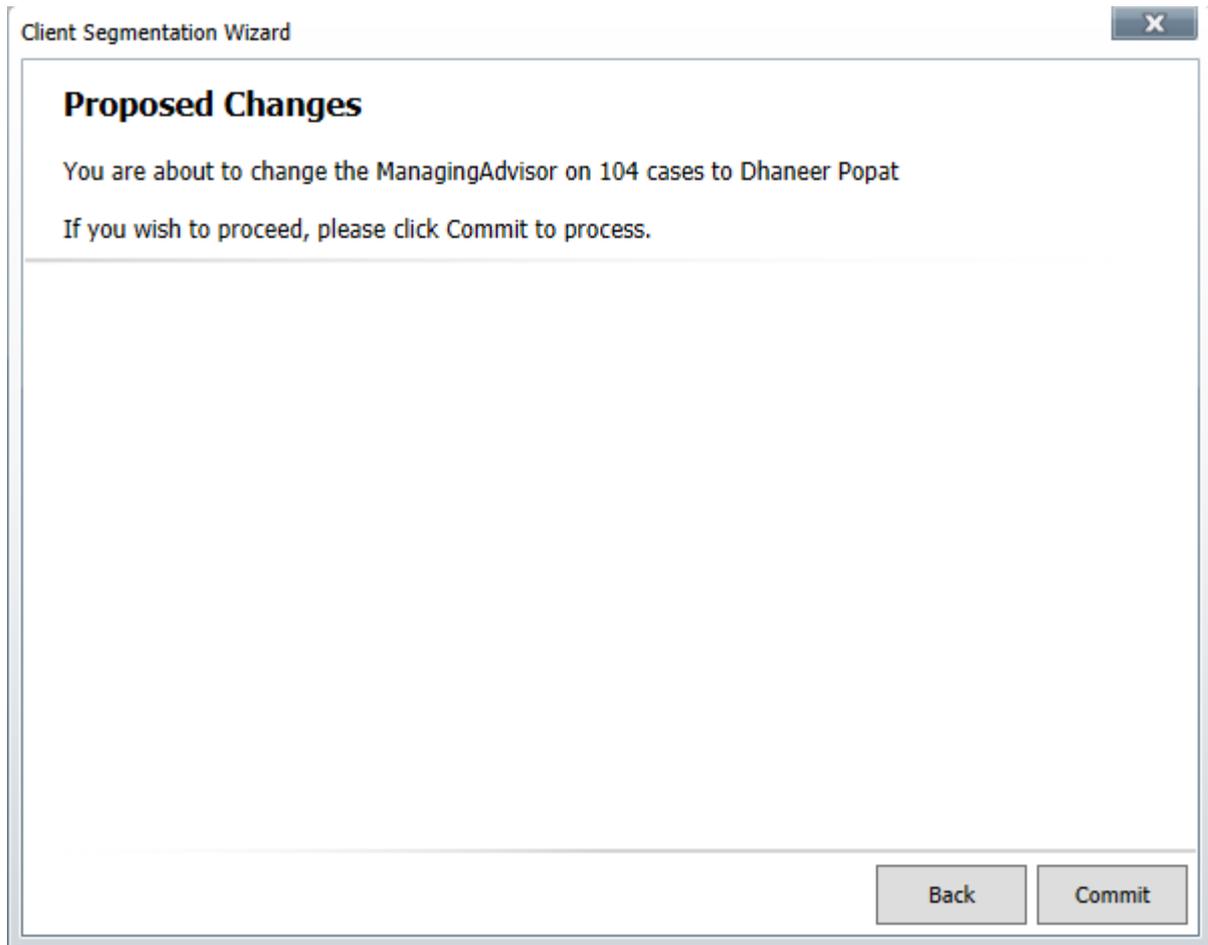
Please make your selection

Dhaneer Popat
▼

Back
Next

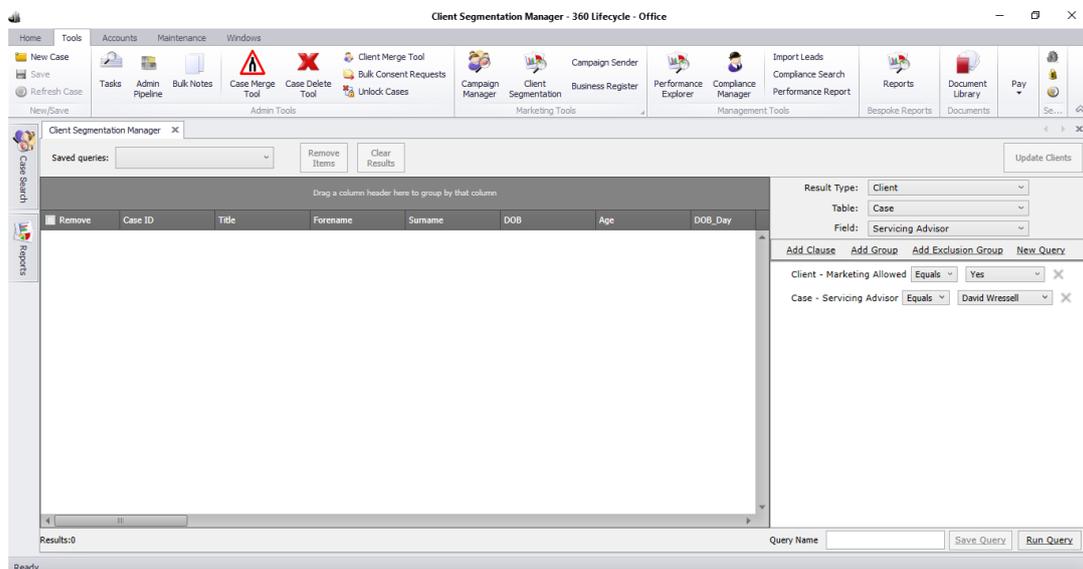
From here you can choose your selection from the drop-down menu as regards to which advisor you would like to make the transfer to. Once done, select **Next**.

Now you will be given the option to **Commit** the proposed changes.



Once loaded your changes will have taken effect. All you now need to do is select **Finish**.

From here, you will be able to confirm that those clients have transferred across by simply re-running the same query list to display how many clients/cases are



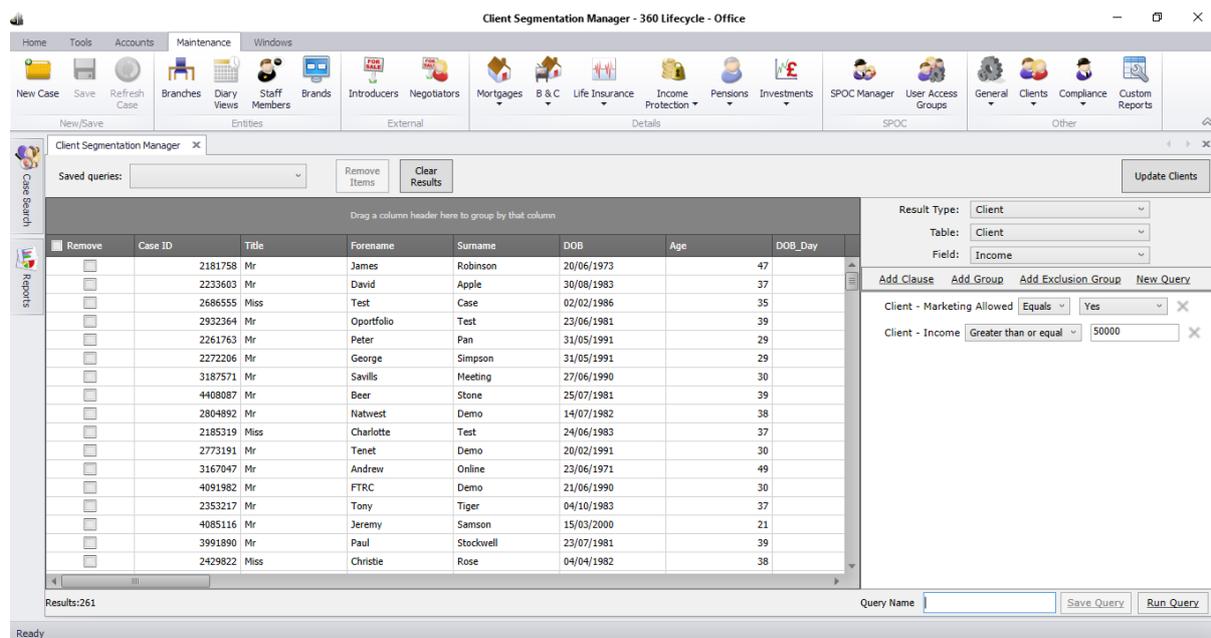
allocated to the original Servicing Advisor. You should see that the results displayed equal 0.

2.4.2 Example Query 2 – List all clients who have an income over £50,000 and then allocate a Marketing Segment of ‘High Earner Clients’

Please note that before allocating your relevant Marketing Segment in bulk you need to add your Market Segment in Office, Maintenance, General & Market Segments

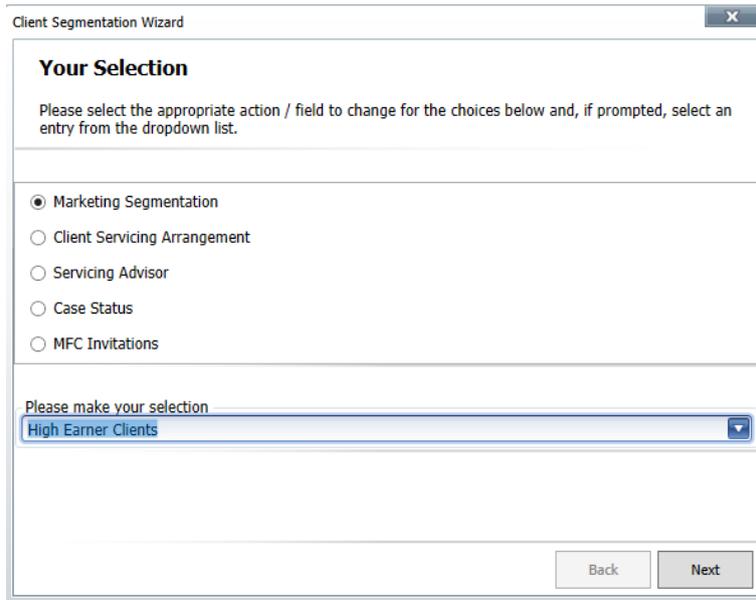
First, select **Client** under the Table column and then **Income** in the Field column.

Once you have done that you now need to select **Add Clause** ensuring that *Greater Than or Equal* appears from the drop-down menu and finally enter 50000 in the income field. If you choose **‘Run Query’** this will show you all clients with an income of £50,000 or over.



Remove	Case ID	Title	Forename	Surname	DOB	Age	DOB_Day
<input type="checkbox"/>	2181758	Mr	James	Robinson	20/06/1973		47
<input type="checkbox"/>	2233603	Mr	David	Apple	30/08/1983		37
<input type="checkbox"/>	2686555	Miss	Test	Case	02/02/1986		35
<input type="checkbox"/>	2932364	Mr	Oportfolio	Test	23/06/1981		39
<input type="checkbox"/>	2261763	Mr	Peter	Pan	31/05/1991		29
<input type="checkbox"/>	2272206	Mr	George	Simpson	31/05/1991		29
<input type="checkbox"/>	3187571	Mr	Savills	Meeting	27/06/1990		30
<input type="checkbox"/>	4408087	Mr	Beer	Stone	25/07/1981		39
<input type="checkbox"/>	2804892	Mr	Natvest	Demo	14/07/1982		38
<input type="checkbox"/>	2185319	Miss	Charlotte	Test	24/06/1983		37
<input type="checkbox"/>	2773191	Mr	Tenet	Demo	20/02/1991		30
<input type="checkbox"/>	3167047	Mr	Andrew	Online	23/06/1971		49
<input type="checkbox"/>	4091982	Mr	FTRC	Demo	21/06/1990		30
<input type="checkbox"/>	2353217	Mr	Tony	Tiger	04/10/1983		37
<input type="checkbox"/>	4085116	Mr	Jeremy	Samson	15/03/2000		21
<input type="checkbox"/>	3991890	Mr	Paul	Stockwell	23/07/1981		39
<input type="checkbox"/>	2429822	Miss	Christie	Rose	04/04/1982		38

Once the results are displayed, to allocate a Marketing Segment of ‘High Earner Clients’ to all of these clients/case records simply choose the option **Update Clients**, select **Marketing Segmentation**, and the relevant selection from the drop-down menu and choose **Next**.



Client Segmentation Wizard

Your Selection

Please select the appropriate action / field to change for the choices below and, if prompted, select an entry from the dropdown list.

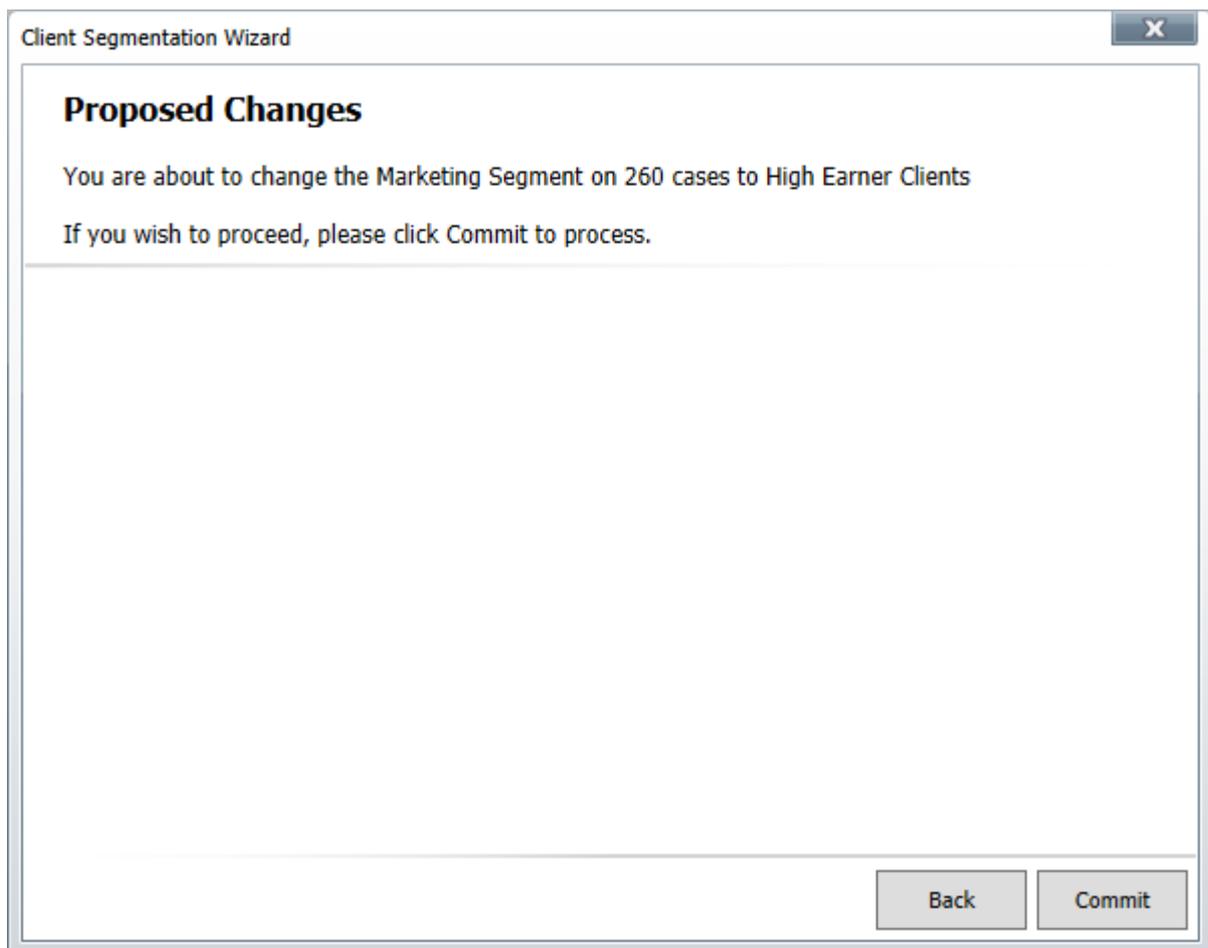
Marketing Segmentation
 Client Servicing Arrangement
 Servicing Advisor
 Case Status
 MFC Invitations

Please make your selection

High Earner Clients

Back Next

You will be given the option to **Commit** the proposed changes.



Client Segmentation Wizard

Proposed Changes

You are about to change the Marketing Segment on 260 cases to High Earner Clients

If you wish to proceed, please click Commit to process.

Back Commit

Once the changes have been made this would have applied the 'High Earner Clients' Marketing Segment to all clients/cases included within the results.

Mr Thomas Richards (24-Nov-81)		50 The Broadway Oadby Leicester Leicestershire LE2 2HE		Change Address
		Export Case		Untracked Emails
Client Details	Case Details	Contact History	Documents	Future Reviews
Client Details	Case Details	Contact History	Documents	Future Reviews
Client Details	Case Details	Contact History	Documents	Future Reviews
Mailing Name	Mr Thomas Richards	Contact Preferences		
Salutation	Thomas			
Branch	Head Office	Servicing Advisor	Tara Bird	
Case Status	Existing Customer	Marketing Segment	High Earner Clients	
Case Source		Servicing Arrangement		
Replacement		Arrangement Start Date		
View Case				