worksorted

business efficiency

Automating the review process

Simon Betchley
sbetchley@worksorted.com
www.worksorted.com

Automate your review preparation

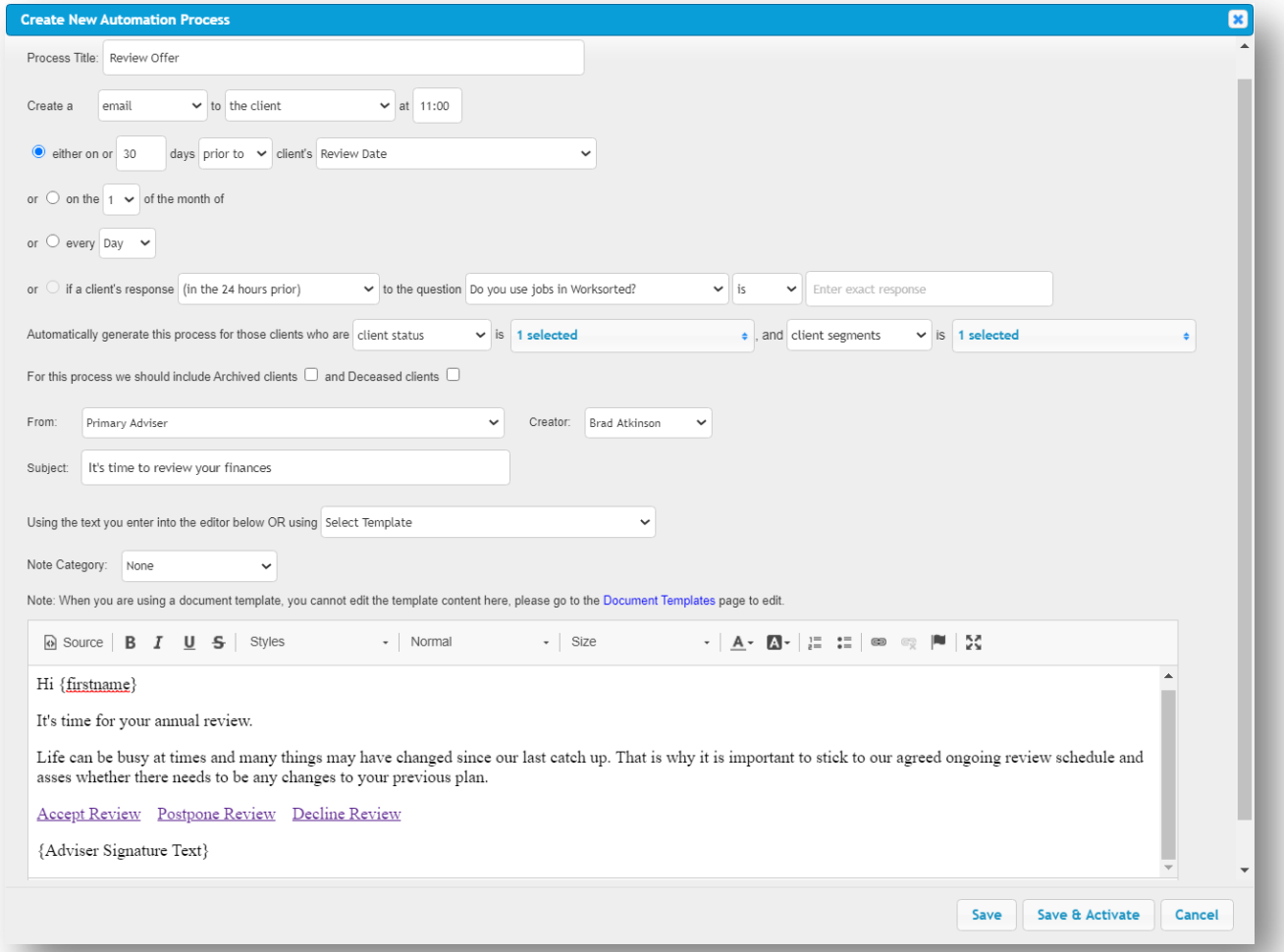
worksorted
business efficiency

- Review offer – Email
- Review documents – Letters/forms
- Review reminder – SMS
- Review job – Staff workflow

Consistent - ensure client touchpoints are actioned

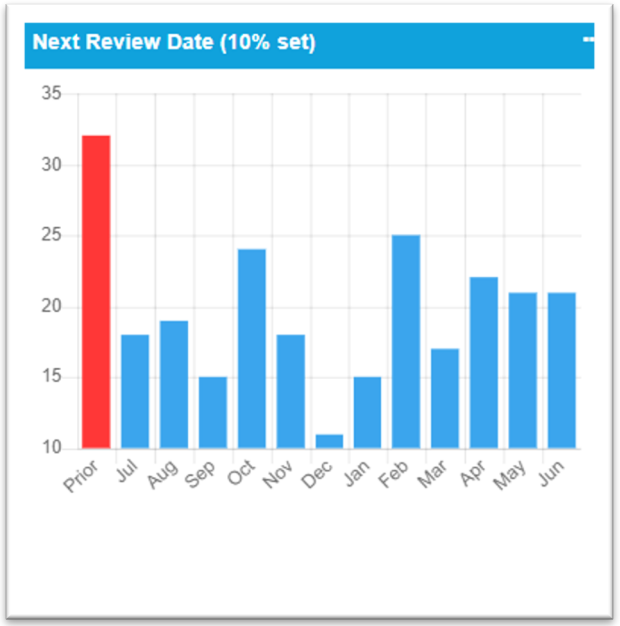
Effortless - set once, apply to all (or segments)

Compliant - client activities and file notes up-to-date



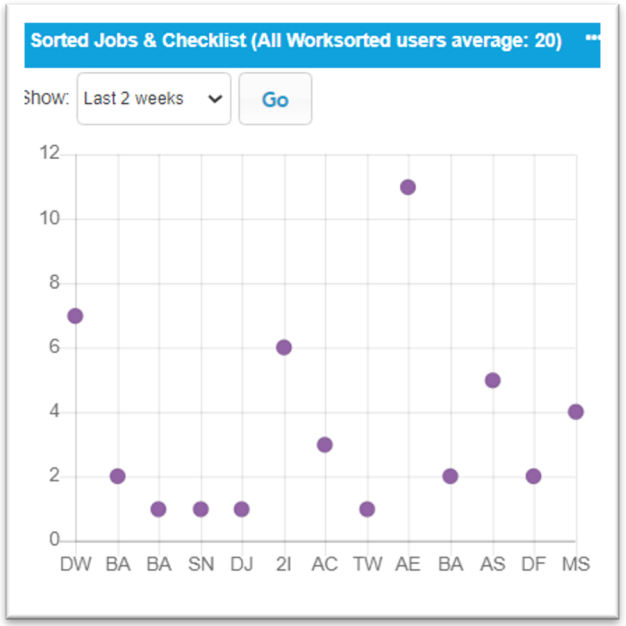
Visibility over the process

worksorted
business efficiency



Monitor upcoming reviews

Visibility over jobs in progress



Oversight over who is completing tasks.

Job Title	Client Name	Job Owner	Days Since Created	Follow-up Time	Due Time	Last Action Time	Send out appointment confirmation SMS	Contact client and schedule appointment time	Update Client Portfolio Details	Prepare documentation for Appointment	Review Meeting held	Compile required file notes summarizing discussions
Annual Review - Alana Downe	Downe, Alana	Simon Betchley	56	8 Jul 2020 19:41	5 Jun 2020 14:38	8 Jul 2020 14:41	✓	✓	✓	✓	**In Progress** Simon Betchley 6 d 0 h 48 m	**In Progress** Marlene Stopp 6 d 0 h 48 m
Annual Review	O'Brien, Claudia Ann	Marlene Stopp	7	9 Jul 2020 10:57	13 Jul 2020 10:43	7 Jul 2020 10:57	✓	✓	**In Progress** Anthea Evolution 7 d 4 h 32 m			
Annual Review	Blok, Catherine	Anthea Evolution	7	14 Jul 2020 16:22	22 Jul 2020 10:42	14 Jul 2020 14:21	✓	✓	✓	**In Progress** Demo Worksorted 0 d 1 h 6 m	**In Progress** Dan Fitzgerald 0 d 1 h 6 m	
Annual Review	Crawley, Cassandra Maire	Marlene Stopp	7	30 Jul 2020 10:43	30 Jul 2020 10:43	7 Jul 2020 10:43		**In Progress** Marlene Stopp 7 d 4 h 46 m				

Visibility over each and every step of the review process

Streamline your follow-up

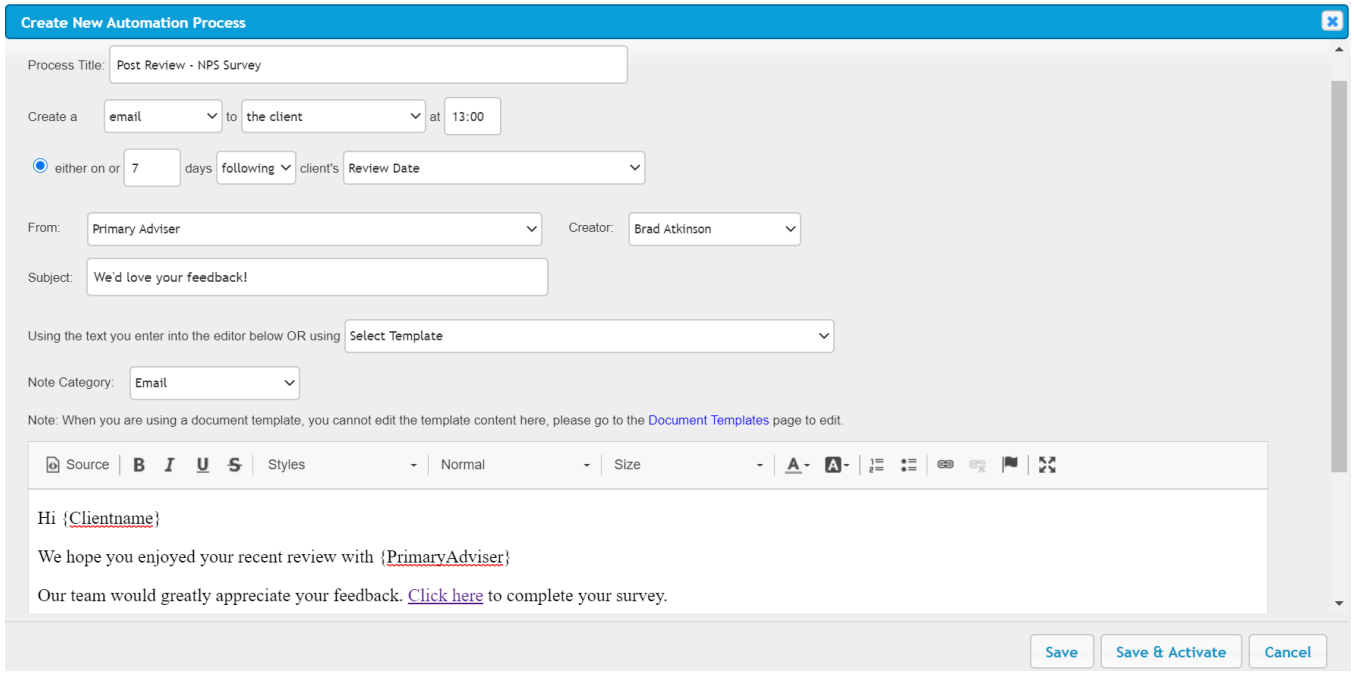
worksorted
business efficiency

- Review follow-up – Email
- Post review NPS – Email
- Review implementation – Staff workflow

Consistent - Follow-up any required actions post-review

Effortless - deliver a multitude of client touch points

Compliant - Ensure no review slips through the cracks



Feedsy worksorted business efficiency

Worksorted and Feedsy are now integrated!

Import client details into Feedsy from your Worksorted profile in bulk

Communication to clients via Feedsy are automatically saved as file notes in your Worksorted profile.

Service package obligations can be noted as ‘delivered’ when Worksorted receives notice that a client has been sent a newsletter (for example). This will flow through to your FDS.

Increase client touch points | **Have confidence in compliance**

Screenshot our solution

worksorted
business efficiency

Intuitive CRM capabilities

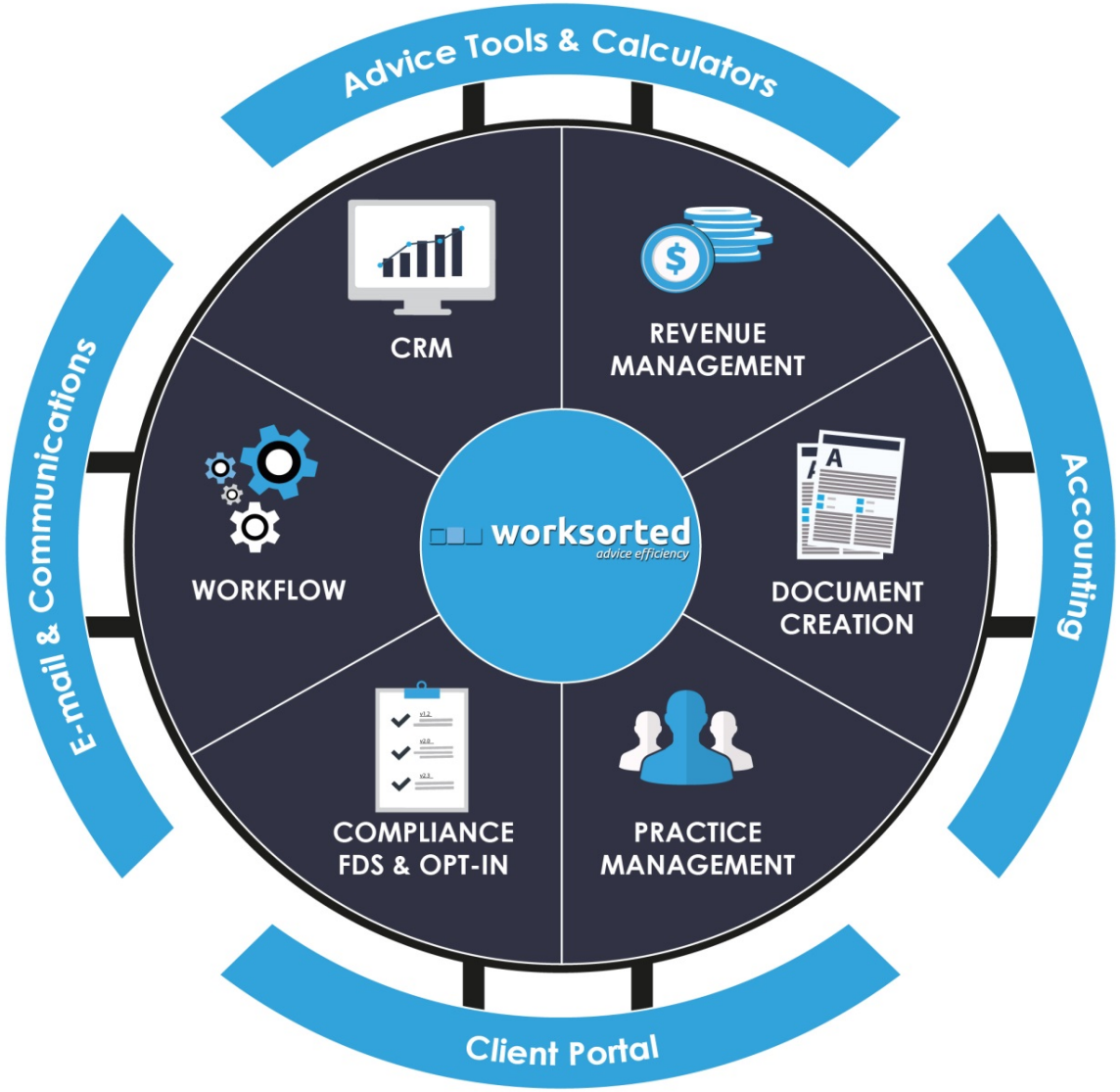
- Customisable CRM options
- Fully automated processes
- Send SMS and emails
- Communicate in bulk
- Create templated documents

Workflow

- Collaborate with internal and external users
- Customise workflow checklists
- Monitor progress

Compliance

- Full FDS & Opt-in capabilities, delivered individually or in bulk
- Client service audit tool
- Compliance checklists



Revenue management

- Payment processing, reporting and analysis
- Actual inbound vs expected revenue
- A huge range of customisable revenue reports

Document Creation

- Utilise a range of document, e-mail, SMS and filenote templates
- Customise and create your own templates

Practice Management

- Performance/KPI reporting
- Profitability reporting
- Trend analysis
- Identify opportunities
- Eliminate bottlenecks

Want to know more?

worksorted
business efficiency

Head to **worksorted.com**

Book a demo or conversation
with one of our team