

KeyStone Opportunity Tab Training

Answer Key – Practice Referrals

Referral Scenarios – Independent Work

To evaluate Opportunity Tab competency, employee homework entries in KeyStone should resemble the following entries

Scenario #1 – Independent: Lainie McCoy, Member 00006, has a car loan at BB&T for her 2016 Ford Explorer. She is wondering what PVFCU's auto loan rates are currently, and if she is eligible to refinance her vehicle loan with the credit union. How will you refer Lainie's request?

The screenshot shows the 'Opportunity Options' form in KeyStone. The form is divided into two main columns. The left column contains fields for 'Default:', 'Type:', 'Description:', 'Explanation:', 'User:', 'Resolution', and 'Explanation:'. The right column contains fields for 'Work Que:', 'Priority:', 'Effective Date:', 'Expiration Date:', 'Start Time:', 'Finish Time:', 'Campaign:', 'Product:', 'Account:', 'Savings:', and 'Loan:'. The 'Default:' field is set to 'Member Interaction'. The 'Type:' field is set to 'Referral Opportunity'. The 'Description:' field contains the text 'Lainie has a 2016 Ford Explorer that she is interested in refinancing with PVFCU. Credit Pull – 725'. The 'User:' field is set to 'Franklin Pran'. The 'Work Que:' field is set to 'Consumer Lending'. The 'Priority:' field is set to '100'. The 'Start Time:' field is set to '04/10/2018 16:52:38'. The 'Finish Time:' field is empty. The 'Campaign:', 'Product:', 'Account:', 'Savings:', and 'Loan:' fields are empty. The 'Resolution' and 'Explanation:' fields are empty. The form has a blue header bar with the text 'Opportunity Options' and a blue footer bar with the text 'Insert Cancel'.

Scenario #2 – Independent: Charles Shroden, Member 00007, started a side business giving trumpet lessons to high school students in his area. With the extra income Charles has coming in, he thinks he needs to open a Business Checking Account. He is also considering renting a larger space for lessons, as his living room is not working out well. What referral opportunity do you recommend for Charles?

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Scenario #3 – Independent: Penelope Rand's, Member 00008, father-in-law passed away recently and left a small inheritance for Penelope and her husband, Brody. Penelope handles the family finances, and doesn't know what to do with money. She is planning to just deposit it into her and Randy's Savings Account, because it seems like the safest option. Who would you refer Penelope to, using the Opportunity tab?

☒ **Opportunity Options**

Default:	<input type="text" value="Member Interaction"/>	Work Que:	<input type="text" value="Investment Advisory"/>
Type:	<input type="text" value="Referral Opportunity"/>	Priority:	<input type="text" value="100"/>
Description:	<input type="text" value="Penelope and Brody received an inheritance from Brody's late father. Seeking wise investment advice."/>	Effective Date:	<input type="text"/>
Explanation:		Expiration Date:	<input type="text"/>
User:	<input type="text" value="Marcy Canret"/>	Start Time:	<input type="text" value="04/10/2018 16:52:38"/>
Resolution	<input type="text"/>	Finish Time:	<input type="text"/>
Explanation:		Campaign:	<input type="text"/>
		Product:	<input type="text"/>
		Account:	<input type="text"/>
		Savings:	<input type="text"/>
		Loan:	<input type="text"/>

Insert Cancel