

## 3 WAY CALLS PROCESS

### STEP 1 CONFIRM TIME WITH CUSTOMER ON REFERRAL

If a qualifying customer wants to be referred to MarketFinance, **ask your customer for a time** when they are available for an introductory call with MarketFinance (30 min).

### STEP 2 REGISTER CUSTOMER & SUGGEST TIME

As you register your customer on the portal, **suggest a time for MarketFinance to call them**. It is preferred that you join on a 3 way call, but not compulsory (e.g. if you are unavailable or if the customer need is urgent).

### STEP 3 MARKETFINANCE REP ALLOCATED

Once you have completed your registration, MarketFinance will allocate a dedicated rep to your customer. You will receive an automated email with your **MarketFinance rep's contact details**.

### STEP 4 MARKETFINANCE REP CONFIRMS & SETS UP CALL

The MarketFinance rep will confirm the call by **sending an invitation to you and the customer**. In rare cases, the MarketFinance rep may need to propose a different time for the call.

### STEP 5 HOLD CALL

The MarketFinance rep will call you and then conference in the customer.

Should the MarketFinance rep not confirm the call on the same day, or should the customer's need be urgent, please call or email the MarketFinance rep directly.

**Got questions? We're here to help.**

barclayspartner@marketfinance.com // 020 3699 5022