

**Customer Visitation Form for:**

**Hyosung GSC, Miamisburg, OH Center**

**Or Hyosung, Irving, TX Center**

**Please check location above and Provide Minimum of 30 days Advanced Notice of Customer Visit**

|  |  |
| --- | --- |
| Sales Person for Channel Partner: Todd van Uitert or Jory Burton | Date:  |
| NHA Representative: Eric Bowie |  |
| VAR/Channel Partner: Tetralink  | Channel Partner Name Requesting visit:  |

|  |
| --- |
| Financial Institution:  |
| Address: |
| City/State/Zip |
| Web Site and Logo: |

|  |  |  |
| --- | --- | --- |
| Date Requested for Visit | Arrival Time  | Departure Time  |

**Please provide list of names and titles of all guests, FI or company affiliation, and Hyosung attendees**

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| --- | --- | --- |
| **Name** | **Title** | **Position in organization**(i.e. Decision Maker, Gate Keeper, Influencer, End User) |
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**VAR/Hyosung Attendees:**

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| **Name** | **Title** | **Functional Area** |
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**What is current opportunity?**

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| What is customer currently considering –  |

**How many branches does the Financial Institution have?**

**What are the assets?**

**How many ATMs does Financial Institution have?**

**How many TCRs does the Financial Institution have?**

**What is FI’s Branch Transformation Strategy?**

**Breakdown of ATMs by Vendor (include Qty and Model)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Hyosung | Diebold | NCR | Wincor |
| Cash Dispense |  |  |  |  |
| Full Function |  |  |  |  |

**Who drives the customer’s ATMs? ATM Switch?**

**TCR** \_\_\_\_\_\_\_ Hyosung \_\_\_\_ Glory \_\_\_\_ ARCA \_\_\_\_ NCR \_\_\_\_\_Other

**TCR Middleware Application:**

**Conference Call Prior to Visit (Please select one)**

1. **NHA/VAR/Customer**
2. **VAR/Customer**

**Sales Team Objective for Visit:**

A. Gain more information on the MX-series to jumpstart sales.

B. Improved knowledge of the marketplace trends.

C. Improved knowledge on the TCR

**Customer Objectives for Visit:**

A. SEE FIRST HAND ALL THE FUNCTIONALITY OF THE 7800/8800

B. SEE N.H. COMMITMENT TO THE BTM’S

C. SEE N.H. SUPPORT AND SUPPORT TO VAR

**Any topic to stay away from?**

A.

B.

C.

**What is the customer’s ATM network Processor/Switch -**

**Core System –**

**Who services the ATMs? TCRs?**

**What software do they currently run? ATM \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ TCR \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Is the customer doing Deposit Imaging?**

**If so, how are the images moved from the ATM to Item Processing (which Image Agent or System)?**

**Do they do Imaging at the Teller Line?**

**Internal (NHA) Housekeeping Items (Notes for Channel Manager):**

1. For Dallas office-contact Ginger Dearing, Alan Russell, and Linda Carter to add visitors names to welcome signs (Must provide at a minimum 3 days advance notice)
2. For Dallas office-contact Tech Support and Sales Support to ensure ATMs, TCR, and MX8800 in showroom are ready and operational
3. For Dayton office visit – contact your Channel Manager and they will coordinate with Bob Raterman and others at GSC for the visit

**Sample Agenda (please update with your actual agenda items, dates, times):**

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| --- | --- | --- |
| **Timing** | **Topic** |  |
| 9:00 | Welcome and Introductions | NHA rep |
|  | Goals and objectives |  |
|  | Hyosung Branch Evolution | NHA |
|  | Lab Demos – mx8800 tablet, mx7800 video, and ms500 | NHA Team |
| 11:30 | Lunch catered in |  |
| 12:30 | Discussion on transaction set, workflow, Interface, getting started, Project Management, etc….. | NHA Team |
| 2:00 | Wrap Up / Next Steps |  |
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