

Best Practice Tip

OOPS! We Made a Mistake!

or

How to Turn a Customer Problem into a Memorable Service Experience

Overview of this Best Practice Tip

What is the objective of this Best Practice Tip?

Problems occur every day in the normal course of business. Your customer service reps (CSRs) are probably very adept at solving customer problems and providing the high-quality service your customers expect. But occasionally, even the most skilled reps encounter a very difficult customer or a problem that is outside of their ability to solve. While typically dreaded, these difficult situations provide a great opportunity for your organization to shine. One of the key principles of CRM involves making the most of every customer “touch point”—even the negative ones. Acknowledging a mistake and sending a small token of apology can transform a customer’s negative experience into a positive one. Following up with a customer to check on their satisfaction shortly after a problem occurs sends a very strong message that your customer is important, that you are making time to listen, and that you are committed to continuous improvement.

This Best Practice Tip will help you set up an “OOPS” product in Vision and use Vision’s Customer Relationship Management (CRM) module to trigger a “customer care” follow-up call when an order containing the OOPS product is detected. This CRM event helps you change a customer frown into a smile, and raise visibility of significant customer problems to higher management or sales executives who might otherwise be unaware. *CRM Events* in Vision enable you to implement “best business practices” that help you maintain long, happy, and productive customer relationships.

What is a *CRM Event*?

CRM Events in Vision can be thought of as “handles” on routine activities that occur every day in the normal course of business. They create points of visibility that give savvy dealers a better grip on key customer activities that are targets of opportunity from a customer-care or sales perspective. CRM Events allow Vision users to maintain high awareness of the state of their customer relationships and to trigger best business practices and/or marketing activities that keep customers satisfied and productive.

Which CRM events in the Vision Graphical User Interface (GUI) are discussed, and what types of customers are targeted?

- The **Oops** event watches for orders processed that contain an “OOPS” product ID and triggers a follow-up activity to a key individual in your organization.
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Introduction

An “Oops-worthy” scenario: Mr. Smith is VERY angry. His large order was not shipped as promised and now he’s run out of supplies in the middle of the day. Instead of getting 12 palettes of paper, he was shipped 12 reams. It’s not a happy day in Smithville.

Marie, your veteran customer service rep, has calmed him down and is able to quick-ship over his paper later this afternoon. His immediate problem is solved, but Mr. Smith is still disappointed and questioning why he should continue to do business with your company. Marie lets him get out his frustration, patiently listening. She agrees with his observation that this shouldn’t have happened and makes a commitment to see if she can determine where and why the problem occurred. She can’t guarantee that no mistake will ever occur in the future, but she can commit to taking his concerns seriously. She apologizes for his inconvenience and, though she can’t undo the bad that has just occurred, she can assure him that his satisfaction is most important to her.

As a token to recognize Mr. Smith’s inconvenience, she will be sending along with the paper a box of cookies and an apology. It is an acknowledgment of a small wrong, and that acknowledgment gives Mr. Smith the satisfaction that he needs to move on.

A day or two later, Mr. Smith receives a follow-up call from Judy, Marie’s CSR Manager. Judy is calling to make sure that Mr. Smith is “whole” and to provide some additional information about what went amiss and what will be done to prevent the problem in the future. Mr. Smith is now quite impressed. He feels important and cared for and is left knowing that your company will take care of him through thick and thin.

The table on the following page presents an overview of the implementation steps for this Oops scenario described above.

Implementation Steps	
Action Step	Who Does This?
1. Purchase cookies or some other small gift item that will be used as your OOPS product.	CSR Manager, Executive Management, and Purchasing
2. Set up a product called OOPS in Vision and set the cost and price to \$0.00. Add a light apology message as the product description. –or– If you already have a product with a price and cost of \$0.00, you can set up an OOPS alpha product record and tie it to that product.	Purchasing Manager and CSR Manager
3. Establish criteria for your CSRs to use to determine if they have an Oops situation. Determine who should receive the follow-up activity after an Oops occurs, what should be communicated in the call, and what remedial actions are generally appropriate.	CSR Manager or Operations Manager
4. Set up and launch the Oops event via the Event screen of the CRM Management tab	CSR Manager or Operations Manager
5. Train CSRs on how to identify an Oops situation and how to add the OOPS product to an order on the Customer Service tab in Vision GUI order processing.	CSR Manager and CSR Staff
6. Train the Account Executive on what an Oops follow-up activity in their queue means and how to make the follow-up call.	CRM Program Manager
7. Using the Status screen of the CRM Management tab, periodically check the status of follow-up activities generated by the CRM event. Use the Follow-up Overrides screen to redistribute or close any stale follow-up activities.	Sales, CSR, or Operations Manager

Step 2: Set up the OOPS product

There are two ways to set up the OOPS product:

- Set up a product called OOPS in Vision and set the cost and price to \$0.00. Add a light apology message as the product description.
- or–
- If you already have a product with a price and cost of \$0.00, you can set up an OOPS alpha product record and tie it to that product.

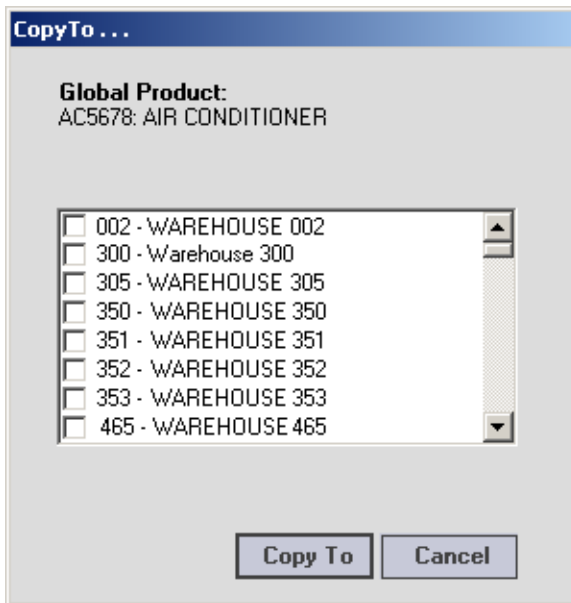
How to Set up a New OOPS Product

1. On the **Product Management** tab, click the **Product Lookup** button. The **Product Lookup** screen appears.
2. In the **Warehouses** drop-down list, select **<Global>**.
3. Click the **New** button. The screen being displayed switches from the **Product Lookup** screen to the **Main** screen.
4. Fill in the fields on the various screens of the **Product Management** tab as necessary. On the **Main** screen, type light apology message in the **Description** field. On the **Costs/Prices** screen, be sure to set the list price and the new PO cost to \$0.00.

Note that in the sample screen shot below, the internal product number of the OOPS product, which is 443313, is included in the Active Data Bar.

The screenshot shows the 'Product Management' window for a new product. The title bar reads 'Vision Enterprise 6.0.5 - for: Preferred TSH Customers'. The navigation tabs include Customer Service, CRM Management, Product Management (active), Accounts Payable, Pricing, Purchasing, and Vision Configuration. The sub-navigation bar shows Product Lookup, Main (active), UOM, Costs / Prices, Locations, Vendors, Contracts, Usage, Wholesaler, and Machines. The product name is '(OOPS) Oops! We made a mistake. (443313)'. The 'Product Number' field contains '00PS'. The 'Description' field contains 'Oops! We made a mistake. Please accept our sincere apologies. Your satisfaction is our greatest concern.' The 'Manufacturer Code' is set to '<None>'. The 'Create Date' is 10/16/2002. The 'Warehouse Product Updates' button is visible at the bottom right.

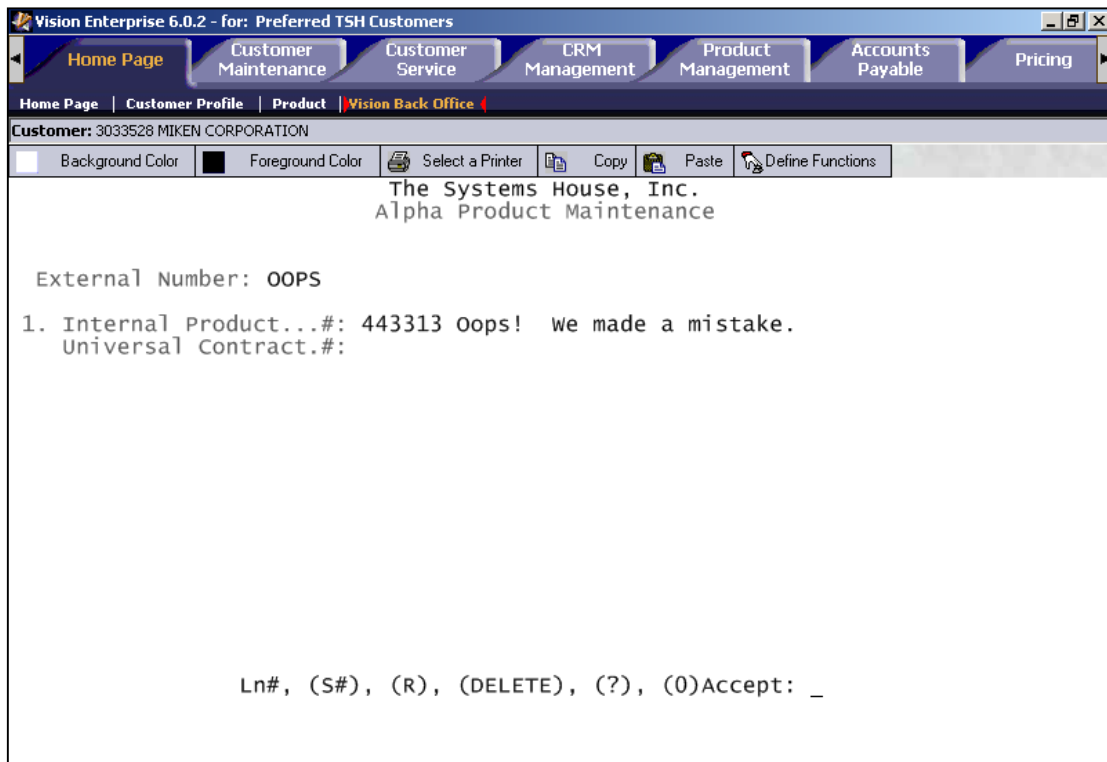
5. Click the **Accept** button to save your new product information. The **Copy To** dialog box appears.



6. In the list, select the warehouse or warehouses that should have this OOPS product.
7. Click the **Accept** button. The **Copy To** dialog box closes, and the system copies the OOPS product records to each selected warehouse.

How to Set up an OOPS Alpha Product Record for an Existing Product

1. On the **Home Page** tab, click the **Vision Back Office** button. The **Vision Back Office** screen appears.
2. If you have not already logged on, you'll need to do so first. Press **Enter** for the login prompt. Once you have logged on with your user name and password, the main menu is displayed.
3. On the main menu, select the **File Maintenance** option.
4. On the **File Maintenance** menu, select the **Product Related Files** option.
5. Select the **Alpha Product Maint** option. The system prompts you for your operator password.
6. Enter your password at the prompt. The **Alpha Product Maintenance** screen appears.
7. The **External Number** field is where you type your user-defined cross-reference for the product. In this field, type **OOPS**.
8. The **Internal Product #** field is where you type the computer-assigned internal product number. In this field, type the internal product number of the existing product.
9. At the command line, type **0** to accept your new alpha product cross-reference.



Step 3: Establish Policy and Handling Protocol for Oops Situations

This is a good time to make sure you are familiar with the follow-up queue on the Vision Home Page. Clicking a follow-up activity in the queue displays the Follow-up area and presents the script to the CSR. The filtering options (available when the Display Options button is clicked) can be used to change the sort sequence and hide or reveal the activities that appear in each CSR's queue. These filter options can be very useful to CSRs who may need to bounce back and forth between handling routine order processing activities and handling their queue of sales-oriented follow-up calls during any downtime. It is a good idea to become familiar with how these filtering options can be used so that you can demonstrate them and train your CSRs.

Step 4: Manager Activates the Oops CRM Event

Note: To view and make changes to the Event screen, you must have the proper security privileges. The CRM job function needs to be assigned to one of your roles. Roles are assigned to users in the User Maintenance on the Security Maintenance screen of the Vision Configuration tab.

How to Launch an Event

1. On the **CRM Management** tab, click the **Event** button.
2. The **Event** screen appears.
3. In the Event listing at the bottom of the screen, click the **Oops** event.
4. Complete the fields as appropriate for the selected Oops event. The table on the next page lists suggested parameter settings.
5. Select the **Active** check box.
6. Click the **Accept** button to save your changes and launch the event.

The screenshot shows the 'Event' configuration screen for the 'Oops' event. The 'Description' field contains 'Follow-up after order placed with "DOPS" product on it.' The 'Active' checkbox is checked. The 'Message Script' field contains a template message: 'Hello [Customer Contact]. I received a customer-care alert that you had a problem recently with an order. I am calling to follow up to make sure that everything was resolved to your satisfaction and to listen to any suggestions'. The 'Trigger' section is set to 'Order' with start and stop dates of 6/25/2003. The 'Route To' list includes 'Account Executive' (checked), 'Angel Anderson', 'Barry A. Johnson', and 'Barry Johnson'. The 'Response Status' list includes 'Closed' (checked), 'FutureOrd', 'Invoiced', 'NewOrder', and 'NoContact'. The 'Accept' button is located at the bottom right of the configuration area.

Event	Description	Active	Trigger	Update Cust	Priority	Source	Media	Start Date	Stop Date
NoOrder60Days	Customers who placed no order in the last...	Yes	NO/W		Low	Customer	Follo...		
Oops	Follow-up after order placed with "DOPS"...	Yes	Order	Yes	High	Order	Follo...		
OpenQuote	Follow-up on open Quotes	Yes	Vision		High	Order	Follo...		
OpenQuote050	Follow-up on open Quotes	Yes	Vision		High	Order	Follo...		
OpenHold	Event Parameters to release Credit Holds	Yes	Vision		Medium	Order	Follo...		
OpenHold050	Event Parameters to release Credit Holds	Yes	Vision		Medium	Order	Follo...		
OrderIcons	This event updates customer profile icons ...	Yes	Order		Low	Order	Follo...		
Practice	This is a practice CRM Activity. Check th...	Yes	NO/W	Yes	High	Order	Follo...		
PriceHold	Follow-up to release price holds	Yes	Vision		Medium	Order	Follo...		
PriceHold001	Follow-up to release price holds	Yes	Vision		Medium	Order	Follo...		

Parameters for Oops Event

The following table is provided as a guideline to help you when you are establishing the parameters for the Oops event.

Parameters for the Oops Event	
Field	What to Type or Select in This Field
Promotional ID field	[Leave this blank.]
Measure Response list	Daily
Priority list	High
Media list	Follow-up Queue
Update Customer check box	The first time you run an event, you may want to leave this unchecked. After you are comfortable that your CSRs have learned how to work with the Home Page, you can check this box to record the follow-up interaction in each customer's Recent Transactions activity log.
Route To list	Account Executive—to alert the Account Executive that an oops situation has occurred in customer service.
Response Status list	Open and Closed
Message Script box	Oops—Use the sample script provided in the event as a starting point, and customize the message as best fits your business culture.
Type list in the Triggers area	Order—to create the follow-up activities immediately after an order containing the OOPS product is accepted on the Current Order screen of the Customer Service tab.
Source list in the Contacts area	Order

Step 5: Train Your Customer Service Reps

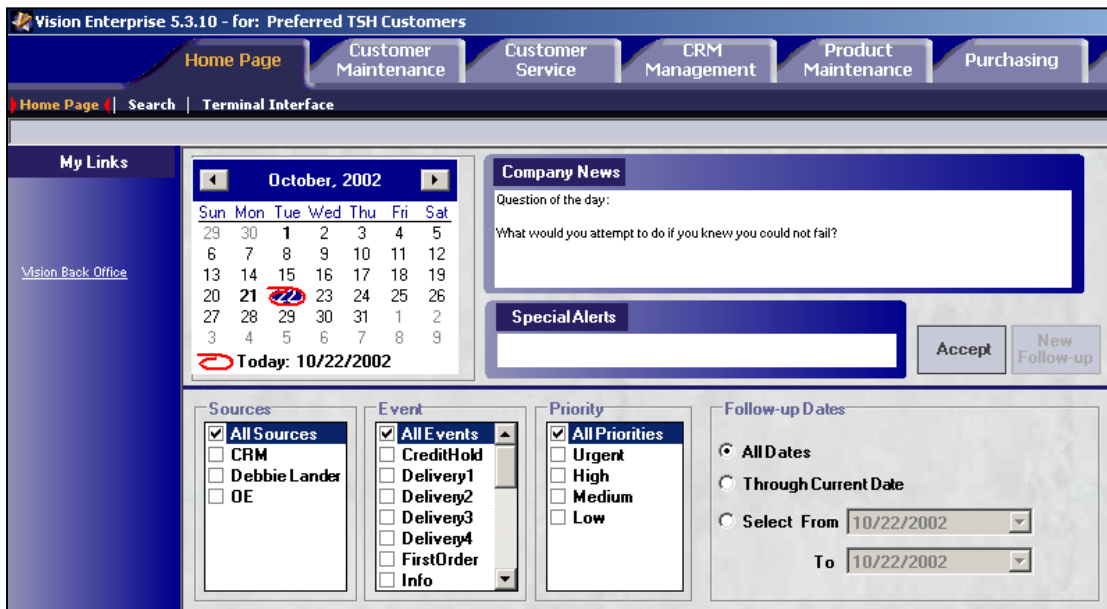
Describe the goals and objectives you are trying to achieve. Demonstrate the process of retrieving an open follow-up activity from the user's follow-up queue on the Home Page. Go through a sample call and describe how the user will be expected to record the outcome of the call. Role-play various scenarios that they might encounter. Demonstrate how a follow-up message may be routed to another user (perhaps a sales opportunity is identified, or perhaps the call surfaces a billing problem). Demonstrate how to change the date of an open call so that it shows up on the calendar in the future. Demonstrate how to manage the follow-up queue by filtering the types of activities. Describe how you will be measuring performance and monitoring the open follow-up calls. Describe the process that users should follow if they need help.

Step 6: Train Your Account Executives

It is a good idea to coach everyone to regularly check their Home Page screen in Vision for follow-up activities that appear in the follow-up queue. Vision generates some of the follow-up activities automatically. Others are generated when CRM events are processed. The following guidelines are presented to help you take care of a follow-up activity generated by the launch of an Oops event.

How to Handle a Follow-up Activity

1. On the **Home Page** tab, click the **Home Page** button.
2. The **Home Page** screen appears.
3. You can adjust viewing options so that only follow-up activities that meet certain criteria are listed in **My Follow-up** queue. This allows you to focus your attention on activities associated with a particular event and hide other follow-up activities while you are focused on making outbound calls. To set viewing options for **My Follow-up** queue:
 - Click the **Display Options** button.
 - In the **Event** drop-down list, select the event you would like to focus on.
 - Click the **Accept** button. The follow-up activities that meet the criteria you selected are displayed in **My Follow-up** queue.



Note: When the filtering options are shown as they are in the sample screen shot above, the Accept button is shown. When the filtering options are *not* displayed, this button becomes a Display Options button.

4. In **My Follow-up** queue, double-click the activity that you would like to work on first. The **Follow-up** area for this activity is shown on the **Home Page** screen. Several fields in this area help you follow up with the customer:
 - The **Contact** field contains the name of the person you should call.
 - The **p** field contains the phone number of that Contact.
 - To read the script that tells you what to say to the customer when you make the follow-up call, click the **View Script** button. The **Message Script** window is shown. This window shows either a brief script or the file name/network location for a document that contains a more detailed message script.
5. In the **Follow-up Details** box, type a brief message explaining how the follow-up call went.
6. If any of the items in the **Service Quality Checklist** are applicable, select them.
7. If you would like to route the follow-up activity to other users, select one or more users in the **Route To** list.
8. If it is appropriate, update the **Status** field.
9. When you are done with the follow-up activity, click the **Accept** button. The follow-up activity is removed from **My Follow-up** queue if you were able to change the status to **Closed**. Otherwise, the follow-up remains in **My Follow-up** queue.

Note: If the follow-up activity is routed to several users and one user closes it, the follow-up activity is removed from that user's follow-up queue only. It remains in other users' follow-up queues until they review and accept the activity.

The screenshot displays the Vision Enterprise 6.0.2 interface for a customer follow-up. The main window title is "Vision Enterprise 6.0.2 - for: Preferred TSH Customers". The navigation menu includes Home Page, Customer Maintenance, Customer Service, CRM Management, Product Management, Accounts Payable, and Pricing. The current view is "Home Page | Customer Profile | Product | Vision Back Office".

The customer information is for "Customer: 3033528 MIKEN CORPORATION". The "Follow-up" section shows the following details:

- Customer:** 3033528 MIKEN CORPORATION
- Contact:** Kramer, (p field)
- Email:** (f field)
- Start:** 6/25/2003
- Stop:** 6/25/2003
- Time:** 12:51:00 PM
- Priority:** High
- Route To:**
 - Debbie Landers
 - Angel Anderson
 - Barry Johnson
 - Bill Bixby
- Service Quality Checklist:**
 - Satisfied with products
 - Driver was courteous
 - Contact has changed
 - Immediate Sales Opp - pls call
- Status:** Open

The "Event Oups" section shows: "01AA2413 OOPS! Service alert on this order. Total Order Amount: 118.49".

The "Sales Hist" section shows a bar chart for "Prior Sales Dollars - 12 Months" with values: 0, 0, 0, 1,709, 12, 122, 561, 165, 123, 124, 0, (1,161).

The "Account Activity" section shows: "Customer Since 12/10/1999", "Open AR Bal \$8,668,837.03", "Open Ord Bal \$151,289.07", "Last Order 01AA2413 6/25/2003 \$118.49".

The "Monthly Order Pattern" section shows: "Avg Sales/Month \$82.22", "Avg GP 99.5", "Avg Ords/Month 3".

Step 7: CRM Manager Checks the Status of the Follow-up Activities

It is a good idea to periodically check the status of follow-up activities generated by the CRM event that you launched. The Status screen on the CRM Management tab serves as a CRM event dashboard, allowing you to review the status of users' open and closed follow-up activities. It also provides a summary of how many open and closed follow-up activities exist for each type of CRM event. If there are a lot of open follow-up activities, you may want to hold off before activating another CRM event so that the CSRs have some time to make the follow-up calls.

The Follow-up Override screen is also useful to help you manage open activities, in the case of a change in staff, or if you detect too many stale activities in a user's follow-up queue. This screen allows you to close open activities in another user's follow-up queue and/or to route follow-up activities from one user's queue to another.

Note: To view and make changes to the Status and Follow-up Override screens, you must have the proper security privileges. The CRM job function needs to be assigned to one of your roles. Roles are assigned to users in the User Maintenance on the Security Maintenance screen of the Vision Configuration tab

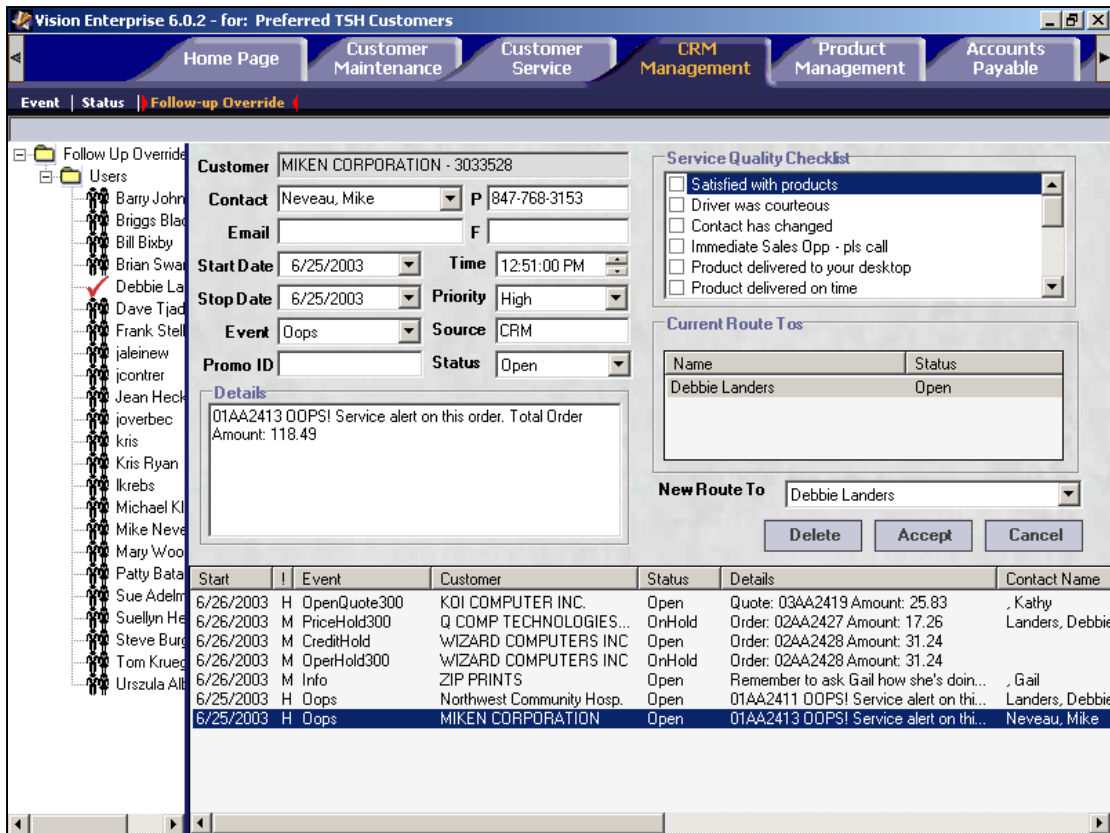
How to Check the Status of Follow-up Activities

1. On the **CRM Management** tab, click the **Status** button.
2. The **Status** screen appears. It is split into two panes. The left pane contains the list of folders, subfolders, and items. The right pane shows details for the item selected in the left pane. Click the **Follow Ups** folder in the left pane to expand its contents.
 - To see follow-up activity data about each of the CRM events, click the **Events** subfolder to expand its contents, and then click one of the events in the subfolder to view data about it in the right pane.
 - To see follow-up activity data about each of the users, click the **Users** subfolder to expand its contents, and then click one of the user names in the subfolder to view data about the user's follow-up activities in the right pane.
3. By evaluating at the numbers of open and closed follow-up activities for a particular event and for various CSRs, you can determine whether or not to activate additional CRM events.

User	Event	Measured	Total Activities	Open Activities	Closed Activities	% Closed	Open To...	Closed Today
Debbie L...	Oops	Daily	3	3	0	0.0	3	0
Kris Ryan	Oops	Daily	1	1	0	0.0	1	0
Sue Adel...	Oops	Daily	1	1	0	0.0	1	0

How to Override One or More Follow-up Activities of a User

1. On the CRM Management tab, click the **Follow-up Override** button.
2. The **Follow-up Override** screen appears. It is split into two panes. The left pane contains the list of folders, subfolders, and items. The right pane shows details for the item selected in the left pane.



3. Click the **Follow Ups** folder in the left pane to expand its contents. The **Follow Ups** folder consists of users who have follow-up activities in their queue.
4. Click a user. The **Follow-up Override** screen appears in the right pane. The Follow-up queue at the bottom of the screen shows all of the follow-up activities for the selected user.
5. Click a follow-up activity in the queue, and the corresponding information will be shown for that follow-up activity, allowing you to override fields as necessary.

You can override more than one follow-up activity at a time (for example, to route many of the follow-up activities of a user to someone else). To do so, select the appropriate follow-up activities in the Follow-up queue at the bottom of the screen.

- To select consecutive follow-up activities in the Follow-up listing, click the first one, press and hold down SHIFT, and then click the last one.

- To select follow-up activities in the Follow-up listing that are not consecutive, press and hold down CTRL, and then click each one.

When multiple follow-up activities are selected, you can override some of their settings all at once. For example:

- You might want to reroute all of the selected follow-up activities, so you could select a user in the **New Route To** list, and then click the **Accept** button.
- You could delete all of the selected follow-up activities by clicking the **Delete** button.

Notice that many of the fields are not available when multiple follow-up activities are selected, since those settings could be different for various types of follow-up activities.