Best Practice Tip
Make the Most of Customer Service Rep Downtime

Overview of this Best Practice Tip

What is the objective of this Best Practice Tip?

Instead of supporting a cost center, why not turn your customer service center into a profit center? This Best Practice Tip will help you use Vision's Customer Relationship Management (CRM) module to create customer-focused follow-up activities, boosting the productivity and order yield of your customer service reps (CSRs). *CRM Events* in Vision guide your CSRs to make outbound follow-up calls to selected segments of customers, using downtime when the phones are quiet to increase sales and strengthen 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 **NoOrder60Days** event targets customers who have not placed an order in the last 60 days but have placed an order in the previous 60 days.

- The **FirstOrder** event targets new customers who have just placed their first order and will likely welcome a quick follow-up check on their satisfaction.

Introduction

The phones are quiet. Your customer service reps are poised and ready, waiting for incoming orders. During the downtime between taking incoming customer calls, what if your CSRs were guided to make outbound calls themselves, targeting those customers that are most likely to buy? What if their downtime was used to ensure satisfaction and raise visibility among your newest customers? More contact = more satisfied customers = more orders!

The table on the following page presents an overview of the implementation steps for the CRM Events described in this Best Practice Tip.

Implementation Steps	
Action Step	**Who Does This?**
1. Plan procedures and outline a telemarketing script that you would like CSRs to follow. Determine personnel that will participate in the distribution of outbound telemarketing calls.	Sales, CSR, or Operations Manager
2. Set up and launch a CRM Event via the Event screen of the CRM Management tab.	Sales, CSR, or Operations Manager
3. Train CSRs on how to handle messages in their Home Page follow-up queue.	Sales, CSR, Operations Manager & CSR staff
4. Make follow-up phone calls for the activities listed in the queue on the Home Page screen.	CSRs or Account Executive, or users on the distribution list for outbound calls
5. 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. Repeat the implementation steps with another event, as appropriate.	Sales, CSR, or Operations Manager

Step 1: Manager Plans Procedures and Writes Call Script

Planning Events to Launch

It is recommended that you start slowly when implementing CRM. Activate one event at a time and assess the results. This will give you an idea of how many follow-up activities are generated when these types of events are active and how well your staff is able to manage the new activity. Creating too many follow-ups at a time when CSRs are already very busy makes for unhappy CSRs with a lot of follow-up activities growing stale in their follow-up queues.

After determining the event you want to launch, write a brief script that your CSRs can follow as they make their calls. Not everyone is comfortable making an outbound sales call, but a follow-up call after an order has been placed or to an existing customer to check on how they are doing is relatively low-sell and comfortable for most people. Emphasizing "Customer Care" and "Quality Service" versus sales objectives can help you get staff buy-in to the new process. Your script can go a long way to help inexperienced CSRs deliver the right message and feel more comfortable as they pick up the phone.

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 2: Manager Sets up and Launches the CRM Events

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 one of the following events: **NoOrder60Days** or **FirstOrder**.

4. Complete the fields as appropriate for the selected CRM event. The following two pages have tables that list suggested parameter settings.

5. Select the **Active** check box.

6. Click the **Accept** button to save your changes and launch the event.

Parameters for NoOrder60Days Event

The following table is provided as a guideline to help you when you are establishing the parameters for the NoOrder60Days event.

Parameters for NoOrder60Days	
Field	**What to Type or Select in This Field**
Promotional ID field	[Leave this blank.]
Measure Response list	Daily
Priority list	Low
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 CSR—to route follow-up activities to the customer service reps assigned to a customer (or Account Executive, if you want salespeople to make the follow-up calls, or a distinct user or group of users, if you want to distribute the calls among a specific group of people).
Response Status list	Open and Closed
Message Script box	NoOrder60Days—Use the example 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	Now—to create the follow-up activities one time, immediately upon clicking the Accept button.
Source list in the Contacts area	Customer

Parameters for FirstOrder Event

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

Parameters for FirstOrder Event	
Field	What to Type or Select in This Field
Promotional ID field	[Leave this blank.]
Measure Response list	Daily
Priority list	Medium
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 CSR—to route follow-up activities to the customer service reps assigned to a customer (or Account Executive, if you want salespeople to make the follow-up calls, or a distinct user or group of users, if you want to distribute the calls among a specific group of people).
Response Status list	Open and Closed
Message Script box	FirstOrder: Use the example 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	Now—to create the event activities one time on the fly.
Source list in the Contacts area	Order

Step 3: 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 4: Customer Service Reps Place Follow-up Calls

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 the follow-up activities generated by the launch of the NoOrder60Days and FirstOrder events.

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.
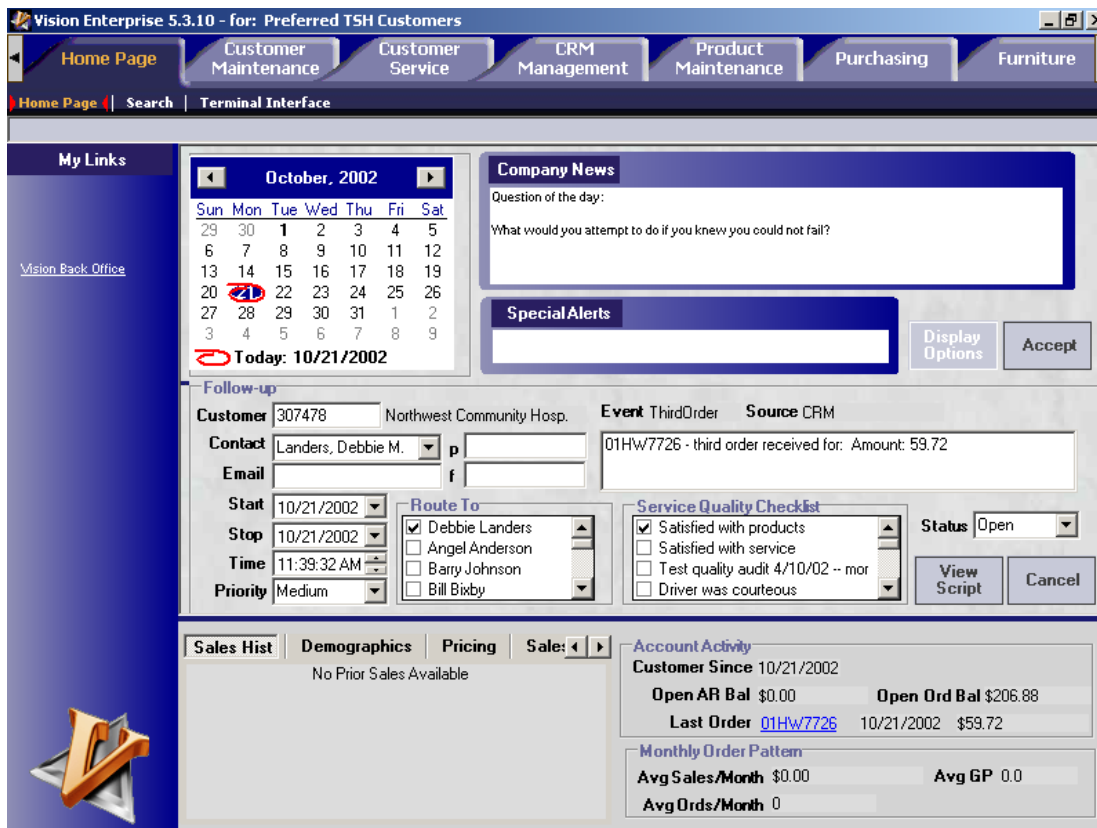

Note: When the filtering options are shown as they are in the sample screen shot above, the Accept button is shown. When the filtering options are *not* displayed, this button becomes a Display Options button.

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.

Step 5: 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.