Customer Retention Management (CRM)

Standard User Quick Start Guide

1 Open Customer Retention Management

The Customer Retention Management module can be accessed from the *Prospects* page. Use the down arrow in the list box to display the modules available, then click the name of the module to open.

On the *Prospects* screen select *Customer Management* from the drop downlist of AVV modules .

2 Respond to Unread CRM Email

Respond to the customer's email by clicking the *Respond* button. An email template will display with the customer's message .

The *Work Plans* page will display when the CRM module is opened. The list of *Unread CRM Email* will display in the window. The customer's name is linked to the *Customer Detail* window. Click the link to open the detail window, the *Unread Email* will display in the *Notes* section of the window.

3 Complete Work Plans

Customer contact is administered through processes created and assigned by CRM managers. Each step in a process generates a *Work Plan*. The left frame of the *Work Plans* page displays links to the different types of *Work Plans*. Click a link to view the list of *Work Plans*. View the *Work Plans* due on other dates by using the calendar to change the date displayed. The process for completing phone call, automated email, manual email, and letter *Work Plans* is very similar. Click the *Work Plan* links to display the lists of the plans to be completed.

Click the *Template* link to open the Work Plan's scheduled action.

Click the customer's name link to open the *Customer Details* window.

Click the CRM Process link to view the steps of the process.

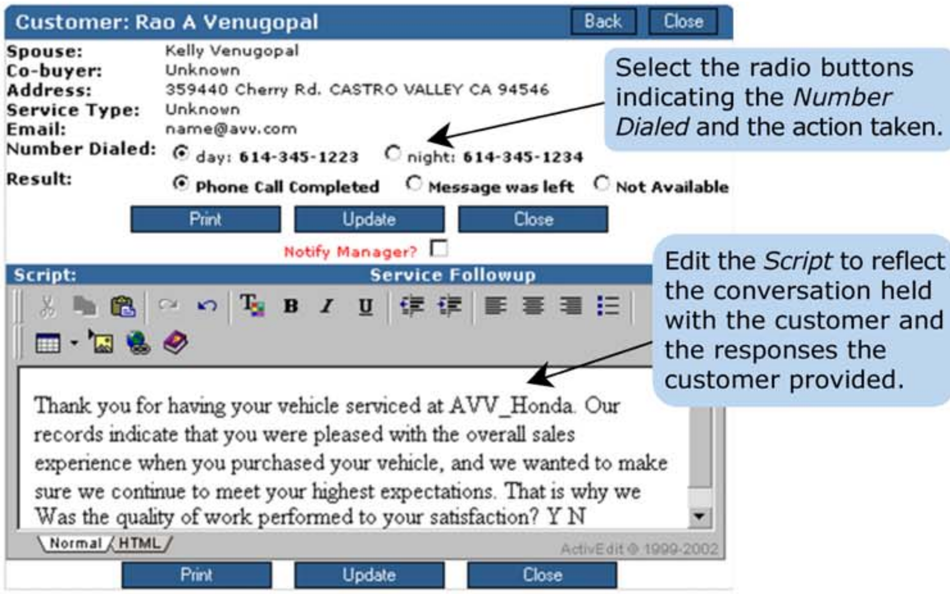
Completed Work Plans will display a checkmark in this box.

Click the *Name*, *CRM Process*, or *Template* columns to display additional information in pop-up windows. The *Name* link opens the customer's detail window; the *CRM Process* link opens the CRM process displaying the steps in the process with the current *Work Plan* bolded. The *Template* link opens the action to be completed for the selected *Work Plan*.

The contact information, *Rep*, *Due Date*, Status checkbox, and *Warranty* columns display static information that cannot be altered from the *Work Plan* screen. The *Due Date* will display in red, when the *Work Plan* action is past due. The check box indicating the completion status of the *Work Plan* can only be updated by completing the action required by the *Work Plan*. (email > clicking *Send Email*, phone > clicking *Update*, letter > clicking *Print*)

Phone Calls

Phone Call templates include personal and contact information regarding the customer. To complete the *Work Plan*, record the *Number Dialed* and *Result* by selecting the radio buttons corresponding to the phone number called and the call action taken. The *Script* text box will contain the scripted conversation to be completed with the customer. Edit the text to record the customer's responses. If the responses provided by the customer require a manager's attention, click the *Notify Manager?* check box. The main manager on the system will receive the customer's record in their Unmatched Email.



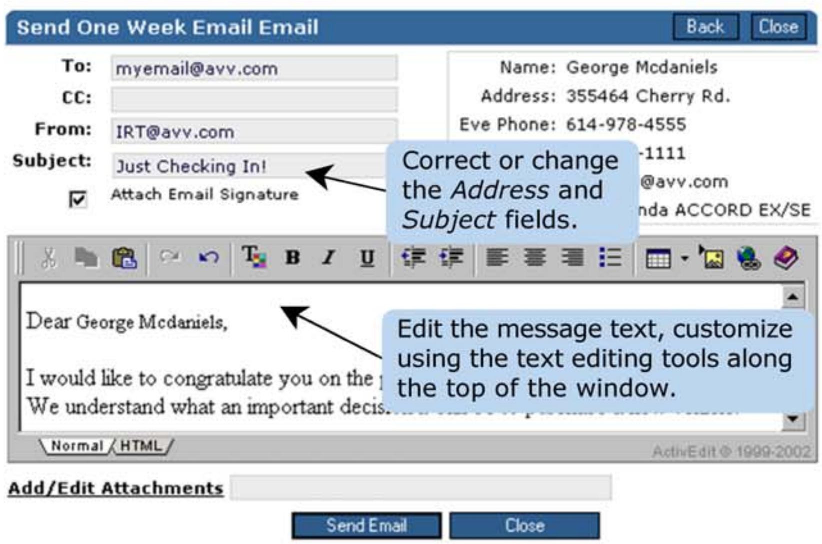
Manual Email

Manual Email *Work Plans* must be completed by clicking the *Send Email* button from within the Work Plan template. The *To*, *From*, *CC*, *Subject*, message text, and *Attachments* can all be modified before sending the email. To modify an address or text field, select the text to delete or change, then type the modification. Use the text editing tools along the top of the text box to customize the appearance of the text.

Automated Email

Automated Email templates display the same as the manual templates, however, the automated templates are sent automatically. The process which sends automated email begins at 7 AM and continues until the process is complete. When the email has been sent a check will display in the status check box on the Automated Email *Work Plan* page.

In the case that an email fails for any reason, the record will display on the *Failed Email* screen where it can be corrected and resent. If a failed email record is not corrected and sent it will roll off the list of failed email after 7 days.



Letters

Letter *Work Plans* display a letter template that can be modified before printing. Click the *Print* button to print the letter and complete the *Work Plan*. After the letter template has been printed the system will prompt the selection of an envelope from the list box. Make any necessary modifications to the envelope then click the *Print* button to print the envelope.

The *Print All* button at the top left of the *Letters* screen will print all of the Work Plan letters. If all letters are printed the system will display prompts to print an envelope for each of the letters. A Letter Work Plan will be marked completed on the on the *Letters* page when the letter has been printed.