Online Customer Support

with

CRMdesk

Copyright © 2004
SkyeyTech, Inc.

Contents

Executive Summary

As the competition in the globalized economy intensifies and customers become international and more demanding than ever, selling a quality product for the right price no longer ensures long-term revenue growth. Prompt and consistent advice in the pre-sale and support in the post-sale customer lifecycle phases become important components of most product mixes, especially in IT industry. Moreover, competing successfully in the innovative areas means using the most precise and timely information on the customers' demands and expectations by marketing and R&D departments.

Although modern communication technology provides many ways for customers to learn about what a product is and how to use it, every one of them makes buying and operating decisions based on their knowledge of the product's ability to serve their specific needs. When surfing through tons of descriptive information and technical data yields no answers to particular questions about your product, the risk of losing a potential or current customer increases. On the other hand, phone assistance may be perceived as unprofessional when your support or presale staff is unable to provide adequate online advice. In the meantime, your product or service may perfectly suit customers' requirements and such embarrassing situations are caused by a mere lack of communication with your customers.

Despite the seemingly narrow scope of the issue, filling this gap can provide substantial benefits to businesses apart from an overall enhancement of communication with customers. By employing modern CRM technology companies can increase their competitiveness and boost revenues by constantly acquiring new customers and retaining existing ones in the most cost-efficient way.

To achieve these objectives, CRMdesk software possesses a number of powerful features that enable you to:

- provide your leads and customers with fast professional advice and support on demand;
- better understand customers' needs and expectations and thus be ahead of your competitors;
- react immediately to customers' feedback on product defects;
- better organize and manage your support staff resources to reduce costs;
- work with international customers and support teams;
- collect and efficiently reuse accumulated technical and business knowledge;
- avoid engaging in a costly and risky CRM system implementation project.

CRMdesk offers a ready-to-use framework for support communication, which can be fully customized according to your special needs.

Overview

The variety of CRM software today is astonishing, and the range of available CRM commodities spans from sophisticated all-inclusive solutions to straightforward email spamming services. However, the results of the current sales force automation hype have proven that knowing and analyzing marketing figures mean very little if businesses fail to communicate the value of their products to their customers and help them use these products most efficiently.

Essentially, creating and wisely using a good two-way support link between an enterprise and its customers involves several steps:

- determining the objectives of such communication;
- evaluating available tools and resources;
- creating a methodological frame of reference for support processes;
- technically designing the solution;
- implementing the solution, including staff training;
- engaging the customers in communication by means of the solution;
- constantly improving this element of your service infrastructure to anticipate customer requirements for support communication;
- analyzing customer feedback to fix existing product problems and develop new, inventive features to make it more competitive.

There is no doubt that it is up to the management to decide on whether a company should employ a third-party solution or develop one on its own. Nevertheless, when support over the Internet is in question, recent tendencies show that in-house project costs and risks can be completely outweighed by a professional ASP solution, such as CRMdesk.

CRMdesk is a software package that embraces both latest Internet technology and advanced support process logic to relieve you of technical issues and to allow concentrating on your customers, because

- CRMdesk is completely web-based and well-secured to provide reliable operation and content protection without any investments on your part;
- CRMdesk supports the entire customer communication cycle;
- CRMdesk seamlessly integrates into your website and is customizable in terms of processing logic and appearance;
- CRMdesk is easy to use and it requires no staff training, so it can be quickly deployed;
- CRMdesk is being constantly improved and keeps up with the latest technology advances;
- CRMdesk is multilingual to support your customers across the world;
- CRMdesk is covered by 24x7 support.

The CRMdesk Strategy

The CRMdesk solution strategy is based on four cornerstones to maximize the return on your support and service resources expenditure:

- **Quality:** all existing functions and new improvements are inspired by real customer needs and released 100% bug-free.
- **Security and reliability**: all customer content is always protected against unauthorized use and system breakdowns by physical and electronic means.
- **Flexibility:** CRMdesk does not impose its rules on your business; it is flexible to be easily adapted to your way of fulfilling your needs.
- **Support:** the CRMdesk team is always ready to provide professional assistance when you need it.

In fact, each CRMdesk account consists of two integrated web-based applications:

- **Customer Desk** – the “front office” system which can be seamlessly integrated into your website to provide interface for your customers.
- **Support Desk** – the “back office” system used by customer service representatives to handle customer requests.

To ensure maximum cost efficiency for our customers, CRMdesk is offered in two versions: Standard Edition and Professional Edition, and there is no fee for upgrading or downgrading from one edition to the other. **Both editions support unlimited Customer Desk accounts.**

Standard Edition is a fully functional, low-cost solution for small businesses with relatively simple support service processes, in which customer service reps do not have to handle many customer accounts/product areas simultaneously.

Professional Edition is the best option for medium-size and large companies with complex customer service and support processes. In addition to the Standard Edition functionality, it possesses a number of powerful interfaces, integration and processing automation features to improve your support staff performance and speed up reaction and processing times for customer inquiries.

Although it may seem that CRMdesk is only suitable for IT companies, further sections will make it clear that this solution perfectly fits online support functions in virtually any industry.

Features and Functions

This section of the whitepaper provides a description of the CRMdesk functionality, which you can test at any time by ordering a free trial account.

Customer/Staff/Product Management

Organizing the primary entities of CRMdesk creates the operating structure of your customer support system.

One of the ways to register your customers is to delegate this function to your support staff. In addition to standard fields, you can add unlimited custom fields and make them optional or required to classify your customers as much as you want. This information can later be used for search and analytical functions.

Roles make it possible to classify support team members by their content management rights. Each staff member is assigned a role that defines the range of actions this person is able to perform, e.g. create, change, move record etc. CRMdesk account administrators can create unlimited staff roles to reflect all combinations of functional duties and privileges.

To ensure fast and error-free processing of each issue, when a record is created, the product in question and one of its areas must be referenced. Therefore, the system allows maintaining unlimited products and areas within each product. This data can also be used for analysis.

Question Escalation and Routing

CRMdesk provides special tools for automatic processing of questions – fully customizable sets of rules to automatically route and classify entries:

- Assign rules – to assign new entries submitted via the website;
- Mail rules – to move new issues submitted via email to the right product areas of the database;
- Escalation rules – to automatically reassign "idle" open questions and notify support staff and/or customers after certain time passes since the record was created or updated by a customer or staff.

These automation functions substantially reduce routine workload on your staff to allow more time and effort be spent on better service and support.

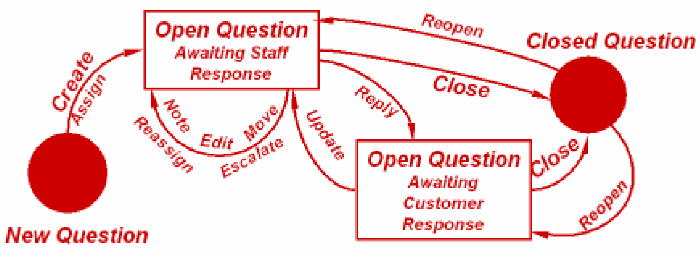
The purpose of assign and mail rules is to speed up the preliminary processing of new records, whereas the escalation rules ensure that all customer inquiries are duly processed. For example, it is possible to set that a question received via email interface from a VIP customer should be forwarded to the team leader whenever it has not been processed for more than 2 hours. At the same time, a question submitted via the website can be automatically assigned within seconds, and be processed based on the FIFO principle but not later than, say, in 24 hours. Thus, even when a support employee is missing or the question queue is too long, the customer is always sure to be taken care of.

Workflow Logic

When a new **question** is posted via the Customer Desk, the system records the following information (fields marked with “*” cannot be changed by customers):

- Product – required listbox field to identify the product the question pertains to;
- Area – optional listbox field to particularize the subject;
- Customer email* – required field used to identify the customer;
- Status* – field used to track the status of a question; status values are defined by each CRMdesk account holder individually in two groups: “awaiting staff response” and “awaiting customer response”.
- Assignee* – the person currently responsible for the question. This field can be used to explicitly assign a question to a staff member (when it is entered by another staff member) or to direct the system to process it using automatic assignment rules.
- Question summary – a brief header to allow quick identification of the question in a list.
- Main Text – the question itself. In addition to usual text, it is possible to reference Knowledge Base records by their IDs put between two pound signs. When the question is displayed later, such references appear as hyperlinks to provide quick navigation to related Knowledge Base records.
- Attachment – a file of any type to support a question or an answer. Attachment storage space is unlimited
- Custom fields – any additional fields for the data you need.
- Question ID – a unique numerical identifier of the question, which is assigned automatically when the record is first saved.
- Creation and Update date and time – the system automatically records this data for every action performed on the record to provide a time reference.

After a record is created, it is assigned either manually or automatically to a customer service representative who can reply to the customer via email, add an open-access or staff-only note to the record, reassign, close and delete it, or move it to another product/area. All the necessary controls can be immediately accessed below the record log, and their range is defined by the user role.



In the Customer desk application, Customers only have access to their records and can also update and close them. However, customers are not allowed to perform any other actions to prevent content inconsistencies.

When a record is created or updated, an email notification is automatically sent to the assignee or the customer, depending on who changed the record.

Visually, each record contains a complete discussion thread and has convenient buttons and tabs to give instance access to other records, functions or areas in the system.

A customer or a staff member can find questions through the search option or in the quick-access “My Stuff” list. In addition, support staff can use custom-filtered lists of open and closed records.

The **Knowledge Base** area of CRMdesk is intended for storing and retrieving FAQ and other issues that you want to make accessible to public or restricted groups of customers. This allows customers to find answers to their questions without waiting for your support response and thus relieve your team of redundant activities.

The Knowledge Base logic is close to that of the Questions area logic but does not imply assignment and escalation. Knowledge Base records are rather static, and customers have read-only access to them.

At the same time, the Knowledge Base supports the same powerful search capabilities and allows customers to submit their instant feedback on the usefulness of the records.

It is also possible for support staff to delete entries from the Questions and Knowledge bases. However, this practice is not advisable since every record’s discussion thread and attachments may become useful anytime, and your storage space is unlimited.

Security and Reliability

SkyeyTech is committed to maintaining high security and reliability standards. It is our policy to keep your information confidential and ensure CRMdesk’s fast and error-free operability 24 hours a day, 365 days a year.

When CRMdesk setup data or content is updated and the information reaches our servers, it becomes heavily guarded both physically and electronically.

To guarantee physical security, CRMdesk is hosted on highly reliable, secure and redundant DELL PowerEdge servers located in the Equinix colocation facility in Chicago (the Equinix security description can be found at http://www.equinix.com).

On the application level, all servers are running Windows 2003 Server operating system and are protected by electronic firewall. All drives use NTFS partitions.

All Microsoft patches, hot fixes and updates are installed on weekly basis, and the most critical are installed immediately upon release. Our system is always using the latest security techniques available from Microsoft.

Cookies are only used to identify user - there is no other information stored in cookies. Cookies are encrypted.

Multilingual Support

Currently, CRMdesk supports English, Swedish, and Japanese interface languages, and more will be available soon. Moreover, CRMdesk supports Unicode encoding, so that its power can be used by large international teams across the world.

Customizing

In the above sections, many CRMdesk customizing options have been described. However, there are more possibilities to make your support system look and work your way.

Tabs and screen area styles can be easily adjusted for both CRMdesk applications:

- **Customer Desk appearance** customization is implemented via HTML formatting to provide seamless integration with your website. Here, you can attach your logo and adjust screen area layouts to your general website style.
- **Support Desk appearance** customization allows to select the necessary quick access tabs, which then appear on every Support Desk page and change background colors and styles of different text elements, such as menus, page body, and tables.

From the **workflow** viewpoint, the following customizing options exist in addition to the assign and escalation rules:

- **Notification and response**: for each type of record create/update action, a notification procedure is maintained, which states who the system should notify when an event occurs, and what email text template should be used. These settings are maintained separately for Customer Desk events, Support Desk events and email question submission. CRMdesk supports placeholders (specially marked character string) in templates, so that when a template is applied, variable data, such as customer name or product/area, are inserted automatically. Each CRMdesk account may contain unlimited templates.
- Custom **question statuses** are maintained in two separate groups: “Awaiting user response” and “Awaiting staff response”. In each group, one status can be set as default and/or initial.
- **Knowledge Base access levels** allow to regulate customer access to your knowledge repository. A customer only has access to the records that belong to the same access level or the Public level. You can define your own levels to ensure maximum privacy of you customers’ information.
- **Reports Dashboard** – it is possible to make important reports appear on the screen with a single click on a page tab. When a report is marked for Dashboard, it automatically generates when you access the Reports area. All other reports can be generated on-demand in the Report Center area.

Reporting

Reporting is an important part of any management system. To support analytical management functions, CRMdesk has two powerful reporting tools: Custom Reports and Web-Query.

Unlimited **Custom Reports** allow managers to analyze question flow by selecting and aggregating (count, sum, average, min and max functions) statistics on the number of questions, their resolution time, pending time, and total life time measured in minutes, hours, weeks or months. Data grouping can be based on question statuses, products, assignees, openers, time data, or be presented ungrouped (by question). You can also choose a presentation format: both table and chart (pie, horizontal/vertical bar, or line) controls are available. After you create and save a report template, it can be used to generate a report at any time.

Web-query gives you the most advanced way to build custom reports using HTML and XML/XSL technology. Upon request, CRMdesk application automatically creates a web page with a table that can be then copied into clipboard and pasted into an Excel or Word file for further analysis. You can even choose to download all discussion threads. By using XSL stylesheets, you can transform the Web-query data into XML format for further transport and analysis with practically any modern analytical program.

Integration

Apart from seamless integration of Customer Desk into your website, CRMdesk supports other powerful integration features described below.

Mail Interface allows customers to submit new questions and update existing records via email. After your mail server receives a message from a customer, it is collected by CRMdesk via POP3 protocol and even supports attachments. The system identifies registered customers by email address in the "from" field. If the system doesn't find such customer, it automatically creates a new one with this email address. The system then creates a new question for this customer or updates an existing question if the subject contains existing question number next to the pound sign, such as "#123".

Custom registration integrates existing customers' login information from your company's website with CRMdesk login mechanism. This helps to avoid double-registration/login if your customers are already logged into your company's website. The system can also be configured to allow initial customers' self-registration at the Customer Desk if they are not yet registered on your website.

CRMdesk can also be integrated with **BUGtrack** issue tracking and project management system to allow questions regarding product quality to be transferred directly to the development team for qualified response.

Newsletters

In order to keep your customers well-informed about your products and services, CRMdesk has a built-in Newsletter Wizard. Message text may contain special placeholders for customer names and your Customer Desk URL and email address. When the user has composed a newsletter and submits it, the system automatically generates a message for each customer in your system who requested to receive it.

Success Tips

To quickly deploy and maximize the efficiency of your CRMdesk account, please consider these easy-to-follow guidelines brought to you by CRMdesk professionals and experienced users.

Organize Ahead

Good organization forms the foundation of success for any project, and CRMdesk is no exception.

Structure your team into functional groups and create respective roles for each one of them, so that everyone's duties are clearly defined in your CRMdesk workflow. On the other hand, keep in mind that excessive segregation of system privileges may lead to lower productivity.

Structure your products and create rules for automatic assignment, escalation and mail processing to ensure well-formed questions and routine automation. Do it before initial deployment and whenever a new product is introduced.

Manage Your Records

All records should be reviewed at certain stage to check the adequacy of their subject lines (summaries) and correct product/area allocation to keep the questions database easily searchable and consistent with your business strategy. Poorly titled and wrongly classified questions are hard to process themselves and they encumber processing other records.

Also, do not forget to sort out issues that could be used in the public area, and enter them into the Knowledge Base.

Send newsletters

Let your customers know of everything you think they would like to know, but do not spam. Communicating your news in an important factor to stimulate customer interest in your products and services that leads to increased revenues. However, a pushy approach will certainly have a reverse effect.

It is also important that your customers are aware of your support system and encouraged to use it, so do not hesitate to involve them using CRMdesk newsletters.

Analyze

Using the reporting capabilities will provide you with a clear picture of what your customers' concerns are with respect to your products and how your support team is performing. By analyzing reports and separate records you can gain marketing knowledge and assess your staff.

Use CRMdesk support

Whenever you or your team members need assistance with any aspect of CRMdesk, use our Knowledge Base or contact our staff for professional advice. We welcome both technical and procedural questions and highly appreciate your comments.

Conclusion

The key to improving customer loyalty in the long run is in understanding their needs and the ability to adequately address their concerns. Long-term customer relationship can only be built on the basis of reliable and transparent communication with them. To meet this requirement in the most cost-efficient way, the CRMdesk team has created a flexible, comprehensive and easy-to-use ASP solution for pre-sale and post-sale customer support, which

- promotes customer loyalty because of better service and support in terms of quality, time and individual approach
- eases product and customer management,
- improves support staff performance by means of organization and automation,
- helps analyze customer feedback on products and services, as well as determine top performers in your support crew
- helps collect information about customer needs not yet fulfilled in the market and thus provides a strong competitive advantage.

To learn more about improving your customer relationship management, visit the SkyeyTech web site at **www.skyeytech.com**

SkyeyTech, Inc.
302 Westmoreland Dr.
Vernon Hills, IL 60061
USA

Fax/Voice Mail: 1.847.362.9757
http://www.skyeytech.com
info@skyeytech.com