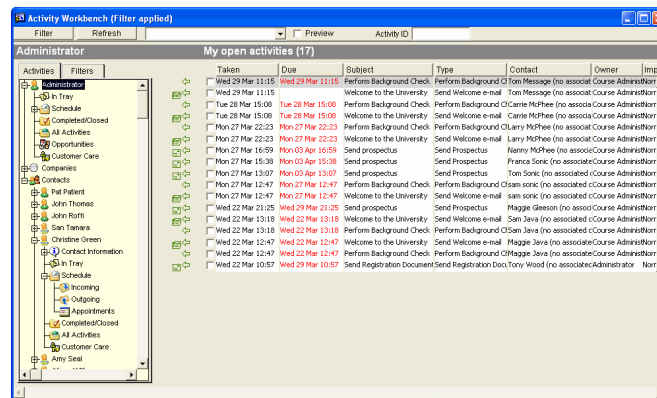


## Manage Leads and Opportunities, Customer Care Transactions and more

- ▶ Builds on data, functionality and integration of other modules
- ▶ Define unlimited number of opportunities
- ▶ Manage your Literature Centre
- ▶ Set up user defined relationships
- ▶ Manage Resources

This is the second module within the Answer CRM application and builds on the Contacts and Company information created within the base Contact Centre module.

It is complementary to the base Contact Centre module and builds on the data, functionality and integration of the Contact Centre application.



## Lead/Opportunity Management and Tracking

An opportunity is a series of steps or plan that are usually carried out to achieve an end result. This Opportunity can be many things:

- ▶ Sales Lead/Opportunity
- ▶ Customer Complaint
- ▶ Post Sales process to ensure a full Customer welcome

Plus much more. Flexible processes can be built and maintained using steps/stages, actions to be carried out, results recorded and decisions made.

Define an unlimited number of business opportunities.

For each opportunity, define what the cycle of events will be and the times associated. These events translate to Stages and Activities in Answer CRM.

Define the individual stages with their own success/failure status, reference, duration, confidence percentage, outcome codes and so on.

For each stage, define the following:

- ▶ Data to be collected
- ▶ Stage progression based on dates
- ▶ Success/fail criteria
- ▶ Activities to be generated; to do, appointments, generate email
- ▶ Notes

- ▶ Values and Reporting Revenue Factors
- ▶ Stage Progression based on rules related to data collected

For each activity, define the following:

- ▶ Owner
- ▶ Course of action
- ▶ Answer Object to be called, enquiries, maintenances etc
- ▶ Data to be recorded
- ▶ Activity content, analysis and literature requirements
- ▶ The next activity

Raise opportunities against Contacts.

Monitor the progress of each opportunity.

Opportunities can control, for example:

- ▶ Sales Leads/Opportunities
- ▶ Customer complaints
- ▶ Customer returns
- ▶ New product development
- ▶ Anything you decide

## Literature Management

Using Contact Centre Business Support, you can manage your Literature Centre.

An item of literature can be virtually anything, a sales brochure, a user guide, health and safety instructions.

A literature item also has a delivery method assigned, i.e. via email, post and so on.

Literature can also be defined as a 'kit' or 'group' so that if a prospect calls for product information you will be prompted to send a Corporate Overview, Terms and Conditions of Business, a Business Card and so on.

If items of literature are defined that can be manually and automatically included in emails sent to a particular contact or referenced if letters are produced via Microsoft Word, for example.

When suitably defined, Literature can be associated with/attached to Lead/Opportunity details.

## Customer Care

Define and manage Customer Care activities. These activities may be services that you provide as part of your overall company offering or they may be used to empathise with Contacts.

Examples of Customer Care definition could be 'Trousers Shortening Services' or 'Customer Apology – Flowers' and so on.

Each Customer Care definition can have an unlimited number of stages/business processes and each has an unlimited number of Response

Attributes that are user defined, have cost and revenue implications, instructions and so on.

For example, the Customer Care 'Trousers Shortening Service' could be defined with 3 stages, Collect, Alteration and Deliver, with costs of £15.00 and revenue of £23.50.

The Customer Care 'Customer Apology – Flowers' could have stages of Call and Write, Send Flowers, Follow Up, with costs of £25.00 and a revenue of zero.

Any monetary impacts from Customer Care activities are interfaced to the Answer General Ledger.

## User Defined Relationships

For advanced usage of the Contact Centre application, user defined relationships can be set up. These can optionally be systems enforced with necessary data collection requirements and associated activity processing.

So, if a Contact is defined as a 'Student' a typical relationship may be the course they are interested in and this can optionally be made mandatory.

Or if a Contact is defined as a 'Patient', typical relationships may be the practice they belong to, the hospital they are referred to and the trust that pays the bills.

Each Contact/Relationship defined can have an associated Activity Template defined. This determines what will happen automatically.

For instance, this could trigger the following activities when a contact of type 'Student' expresses an interest in a course of Music, send prospectus and welcome letter immediately, follow up after 7 days, send formal follow up after 28 days and so on. This is all under user control and definition.

## Resource Management

For advanced usage in Contact Centre, the Resource Management allows you to manage and control the workload (activities) assigned to Contact Centre Users.

User Calendars can be defined that determine when and how many hours a User will be working, including the ability to record absence due to holidays, illness, dentist or doctor's appointments etc.

Timings for various Activity Types can be determined, which provides the basis to monitor User or User Groups workloads. Activities can be re-assigned from overloaded to underloaded Users in order to balance workloads.

Graphical and colour coded enquiries quickly allow over and under loads to be easily identified. Historical analysis can be used to better plan Resource requirements.

For more information visit the Answer Solutions website or contact us.

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