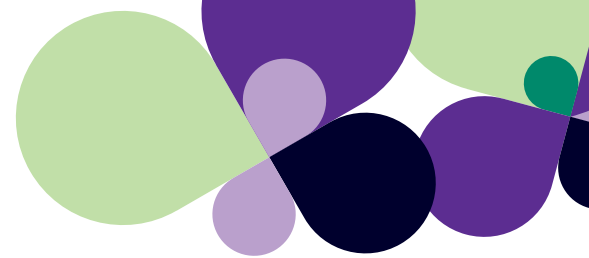


Sage CRM version 6.2



Customer Service Automation

Sage CRM Customer Service is designed to help you effectively manage and resolve issues efficiently by providing you with an easy to use user-interface and powerful feature set. This intuitive interface allows you to easily view information about your customers and resolve their issues effortlessly by employing the escalation features of Sage CRM Customer Service. Integration with leading Sage ERP systems gives customer service staff access to back and front office customer data for a complete 360 degree view of every customer, making every customer interaction more informative and effective.



Feature	Explanation	Benefits
Sage CRM enhancements/new features:		
Cases	Sage CRM defines Cases as customer incidents or requests for technical assistance. Cases include Service Level Agreements. Failure to abide by the time frame allocated to a case will result in the trigger of an escalation process, such as informing the Support Manager that there is a case past its cut-off date.	Ensures that cases are attended to in a timely manner to maximise customer satisfaction and drive customer loyalty.
Knowledge Base	Articles about cases are called Solutions in Sage CRM. This is a powerful resource providing users with technical notes and solutions to known issues or questions which can be stored centrally in the Knowledge Base.	Provides easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via Case Tracking and Communication logs.
Search	With Sage CRM, customer service representatives can search for known existing solutions to new cases in the Knowledge Base using powerful Sage CRM find technology.	Reduces resolution time as it enables users to find information quickly and easily, which ultimately results in improved customer care.
Customer Information	The company/person entities within Sage CRM contain a wealth of information related to each customer.	Profiles customers and their needs - this enables customer care organisations to work to meet their requirements faster based on the historical profile of the customer.
Workflow	The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage CRM Customer Service called Workflow.	Adhering to workflow processes results in escalation and automatic notification to a Customer Care manager if the Case remains inactive for longer than the predefined period of time. This is a powerful automatic reminder that ensures each case is followed up on.

Customer Communications	Sage CRM Customer Service enables customer care users to view communications, contacts, leads, opportunities or cases for each customer in the database.	Improves efficiency and information organisation and reduces administrative time.
Reports	Several predefined reports are available to users. Sage CRM reports can be printed to PDF or exported to CSV as well as being delivered on screen.	Allows easy analysis of case details. Graphs may be added to make the report even more presentable and easier to examine. Reporting with Sage CRM is powerful, yet simple and easy to do.
ERP Integration	Customer service staff have access to back and front office customer data for a complete 360 degree view of every customer. Greater linkage between revenues and SLAs ensure that customers get the appropriate level of service.	Empowers your organisation with critical information to build and support long-term customer satisfaction and loyalty. Maximises every customer interaction and experience.

Providing quality customer care and maintaining satisfied customers is a challenge for every business. Sage CRM allows you to take care of your new and existing customers. By defining business processes, tracking cases and solutions becomes more automated and streamlined, enabling you to focus more time on growing your business while delivering best practice customer service.

Sage CRM for the Customer Service Manager

The Customer Service has direct responsibility for managing the customer care team, resolution of customer queries and provision of feedback on customer needs. They are responsible for the delivery of world-class service to customers.

Benefits of Sage CRM to the Customer Service Manager

- Enables customer satisfaction measurement and benchmarking
- Increases productivity of customer support representatives
- Provides self service to customers around common issues
- Ensures issues never “get lost between the cracks”
- Monitors service performance against service level agreements
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or received the e-mail
- Reduces customer support costs
- Improves response times to customer service requests
- Reduces hold times for customers requiring customer support
- Reduces the average time to resolve an issue
- Increases the number of queries resolved on first contact rate
- Leads to decreased number of service escalations
- Decreases the number of customer complaints received
- Extends customer service through 24x7 self service options
- Enables benchmarking / score carding of customer service operations on an on-going basis
- Leads to increased customer retention
- Leads to decreased cost of customer retention

Here is a round-up of questions which Customer Service managers have commonly raised in our consultations:

Question: How can I ensure that all customer service agents leverage the knowledge of the entire department to maximum effect and don't spend time duplicating work which has been carried out by another agent previously?

Answer: Sage CRM's knowledge management capabilities make it easy for customer service agents to search for remedies related to specific issues which may have been encountered previously. Customer service agents have the ability to submit a solution for publication in the knowledgebase. A full workflow approval process ensures that only solutions which have been reviewed and approved by the relevant manager is published in the knowledgebase.

Question: I have to ensure that my staff deal with queries in a timely manner and ensure they follow the correct escalation procedures.

Answer: Sage CRM provides full workflow management for customer service executives. This ensures that cases are progressed in a timely manner and in accordance with service level agreement (SLA) criteria. Workflow can be fully customised in order to ensure that cases are progressed in accordance with company-specific requirements.

Question: We spend a lot of time waiting for information from other departments before we can resolve customer issues.

Answer: Sage CRM provides visibility on key customer information across the organisation to managers and colleagues. This removes over-reliance on individual members of staff for key customer information.

Key customer details are recorded and maintained in one place. If one team amends a customer's contact details, everyone will have access to the new information and no time is wasted.

Question: Managing customer service effectiveness can be a challenge; particularly when it's difficult to access underlying performance metrics.

Answer: Sage CRM makes it easy to monitor and measure customer service performance. Reports and dashboards provide overview information and detailed analysis on metrics such as: call volume, case resolution times, communications, follow-up statistics and escalations.

Question: The internet has provided companies with more ways to reach customers; can we also serve them online as well as traditional phone and email solutions?

Answer: Sage CRM offers a web self-service module that enables businesses to allow their customers, partners and suppliers to access a subset of their Sage CRM data and functionality over the web at their convenience. This capability can be fully integrated within the company's own website; ensuring that their customers benefit from an entirely seamless experience.

Sage CRM for the Customer Service Executive

Benefits of Sage CRM to the Customer Service Representative

- Enables customer satisfaction measurement and benchmarking
- Assists with performance management and motivates staff
- Captures feedback from customers on product/service issues
- Ensures issues never "get lost between the cracks"
- Reduces time spent researching issues by recording and centralising customer interactions
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or received the e-mail
- Enables staff to meet customer's expectations
- Identifies profile of most profitable customer to help with making out-bound calls
- Improves response times to customer service requests
- Able to multi-task to service customer's live call while accessing multiple resources for solutions
- Reduces hold times for customers requiring customer support
- Reduces the average time to resolve an issue
- Increases the number of queries resolved on first contact rate
- Leads to decreased number of service escalations
- Decreases the number of customer complaints received
- Extends customer service through 24x7 self service options
- Enables benchmarking / score carding of customer service operations on an on-going basis
- Leads to increased customer retention
- Leads to decreased cost of customer retention

Here is a round-up of questions which Customer Service Executives have commonly raised in our consultations:

Question: So much of my day is spent chasing departments for information to help me resolve customer issues? How can Sage CRM make better use of my time?

Answer: Sage CRM provides users with a 360 degree view of the customer across all departments. All customer interactions including, notes, marketing activities, products purchased, communications history, outstanding opportunities, quotes, orders etc. Integrated with the back-office accounting system, Sage CRM can provide users with access to information on payment history, outstanding invoices and inventory. This will provide agents with a holistic view of the customer and enable them to better serve customer needs.

Question: I need to ensure that I manage the handling of customer issues effectively.

Answer: Sage CRM captures, tracks and manages all customer services cases using its powerful workflow capabilities. Customer service workflow can be customised to ensure that company-specific escalation procedures are followed. Alerts and notifications ensure that cases are progressed on a timely basis and in accordance with service level agreements.

Question: Keeping track of customer communications can be a cumbersome and manual task.

Answer: Sage CRM provides customer service executives with 360 degree view of the customer across all departments and interaction types, and provides instant access to: notes, cases, communication history, marketing campaign information and opportunities. This enables customer service executives to service their customers more effectively and address issues at the earliest possible opportunity.

Question: It is very difficult to troubleshoot/resolve an issue that I haven't encountered before.

Answer: Sage CRM's knowledge management capabilities make it easy for customer service agents to search for remedies related to specific issues which may have been encountered previously. Customer service agents have the ability to submit a solution for publication in the knowledgebase. A full workflow approval process ensures that only solutions which have been reviewed and approved by the relevant manager is published in the knowledgebase.



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