Workbooks.com

JumpStart for CUSTOMER SERVICE

Contents

For further advice and guidance please contact Workbooks at **success-usa@workbooks.com** or call +1 860-438-6647.

The ‘JumpStart for Customer Service’ implementation program is designed for customers who are looking to get started with a Customer support centric CRM deployment. The solution consists of a Workbooks database that has been pre-configured to support the needs of a small Support Team and 6 days of implementation consultancy to help you get started.

The ‘JumpStart for Customer Service’ implementation program will help you implement Workbooks and will cover the following areas of functionality:

- Case and SLA Management
- Email2Case
- Web2Case
- Case Portal
- Dashboards and TV Stats

The ‘JumpStart for Customer Service’ implementation program is designed and suitable for customers who:

- Have small teams that are typically no larger than 8 people
- Have teams that are situated within the same office
- Are happy with adopting our pre-defined approach

The ‘JumpStart for Customer Service’ approach would not be suitable for customers who:

- Are larger than 8 members of staff i.e. large call centres
- Have teams that are based across multiple offices
- Require custom Workflows that differ from our pre-defined approach such as different Case screens and lots of custom fields
- Have significant volumes of data to migrate or have complex data migration needs

These customers would benefit from a bespoke implementation package.

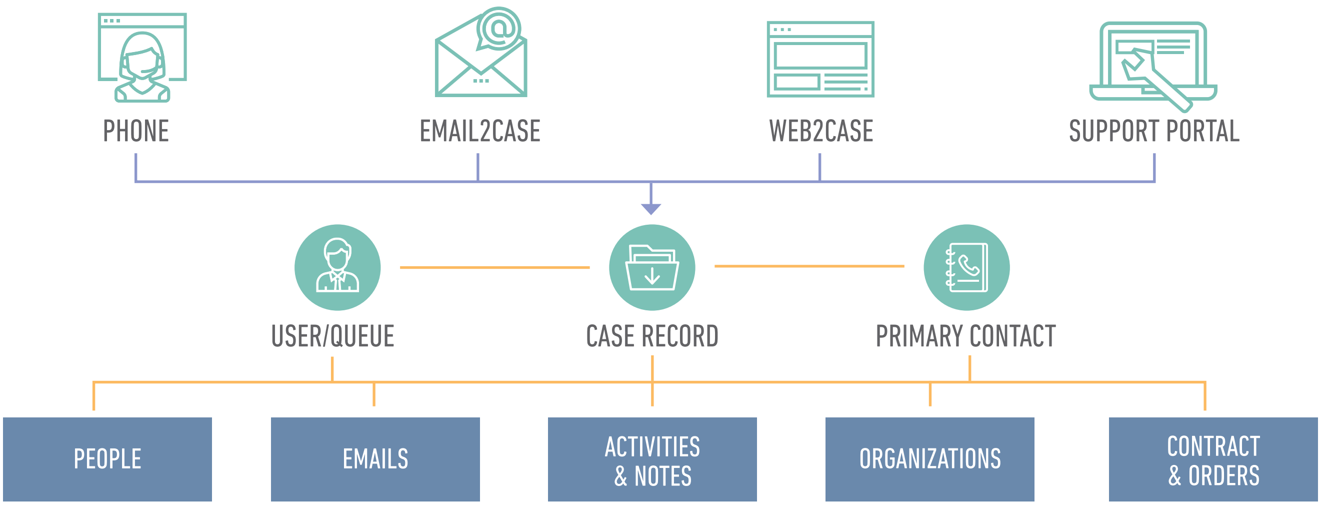
NOTE: In this document:

- Customer – means your own organization
- Client – means your customers

CASE MANAGEMENT
+ SLA Management

Workbooks will be configured to allow your team to raise Case records for tracking your client queries which will be supported with 1 Form Layout.

By default, you can create Activities, Notes and Emails from a Case record. A Case is related to a Primary Contact (Person) record and if that Person has an employer (Organization) then Cases are also related at this level, allowing you to see a full holistic view of the interaction with a client from the time of receiving a query, through to a suitable resolution.



The scope of this project includes:

- Simple configuration tweaks to standard picklist values for Product Area and Statuses
- Configuration of up to an additional 10 fields can be created by the Consultant as part of the configuration on-site day
- Configuration of up to 5 email templates to allow ease of communication with clients

Cases are also configured with SLAs which will be tweaked during the on-site session to provide response and resolution times that you would like your Customer Service Team to aim to reach. Customer Service Management Teams will have access to reports to help them understand where SLAs are being met/breached to ensure effective management of the team.

The SLA Management processes cater for different SLA target response and resolution times for 5 Case severities within 1 set of standard business hours for your organization (including Bank Holidays). Business Hours: Monday to Friday 09:00 to 17:30 excluding Bank Holidays.

For example (please note these are an example only):

Case Severity	Target Response Time Working Hours	Target Response Time Out of Hours	Target Resolution Time
Very High	Respond to all new Cases within 1 hour	Respond to all new Cases within 1 hour	As soon as possible but no later than within 1 day of the call
High	Respond to all new Cases within 2 hours	Respond to all new Cases within the next working day	As soon as practical but within 2 working days or as otherwise agreed with the Customer
Normal	Respond to all new Cases within 1 working day	Respond to all new Cases within the next working day	As soon as practical but within 5 working days or as otherwise agreed with the Customer
Low	Respond to all new Cases within 3 working days	Respond to all new Cases within 3 working days	As soon as practical but within 8 working days or as otherwise agreed with the Customer
Very Low	Respond to all new Cases within 5 working days	Respond to all new Cases within 5 working days	As soon as practical but within 10 working days or as otherwise agreed with the Customer

The Case Management solution will also support an escalation process whereby the Customer Service Agents can create Activities that are assigned to a management queue and transfer the ownership to their Line Manager. The Activities will appear within an Escalation Report on the Line Manager Dashboard so that they can be followed-up as required.

An automated process will be configured in Workbooks to monitor one mailbox that is the main point of contact for your business (e.g. support@company.com). The process will action each email that comes into the mailbox by either creating a new Case (if there is no Case reference in the subject line) or updating an existing Case if a reference is found. This avoids the need to manually manipulate the email within an email client such as Outlook.

For emails that are received for existing Cases, the Customer Service Agent will be notified of an update within Workbooks by a desktop notification (and/or an email depending on their individual preferences) and the Case will be clearly visible on a Dashboard that each agent will work from.

WEB 2Case

One of the following methods will be provided (customer to confirm preferred method):

A pre-configured Web Process that outputs a CSS styled Web Form can be provided by the Workbooks Consultant to capture basic information from the client such as Name, Email address, Telephone number and the nature of the query, plus 1 file upload per form submission. A URL to the form will be provided to you to pass to your web developer who would need to create the relevant page on the website with an iFrame using the given URL.

Alternatively, Workbooks can provide basic HTML for a web form for further flexibility such as specifying your own field mappings or adding your own styling. If this method is chosen, the customer's web developer would be solely responsible for the creation of the form including styling, field mappings and developing a file upload solution. Note this method of Case submission does not include the ability to include a file upload option.

CASE Portal

Workbooks will be setup to provide a fully functional portal whereby your clients can login to an area on your website to raise new Cases. They can also view the history of existing Cases (raised by their Organization) and update them with more information and supporting files. All Cases and associated activities are updated directly in your Workbooks database. Clients can track their Case through to resolution and see historic Cases should they wish to look back on old queries to see previous resolutions.

A Customer Service Agent will update the Case from within Workbooks and an automatic notification will be sent to the Primary Contact of the Case to notify them of the update.

This is achieved by using a Web Process configured in Workbooks. The Consultant will provide you with a URL which you can pass to your web developer who would need to create a new page on the website with an iFrame that uses the given URL.

CASE MANAGEMENT
TV Stats

In Workbooks, a Dashboard can be created from pre-existing reports and displayed on a TV screen in an office environment. This might be particularly useful to not only help motivate your team to meet targets but also to help them know what to do next i.e. show them Cases that are due for a response or resolution next so that they can focus on these first.

A Web Process can retrieve the reports on a Dashboard and generate a URL link. This URL link can be linked to a Raspberry Pi and connected to a TV by your IT Team. The Raspberry Pi can be configured to retrieve each report on the Dashboard at given intervals e.g. every 15 minutes to ensure that the latest information is always being displayed to the Customer Service Team.

The Workbooks Consultant will configure a blank Dashboard and setup the processes required to support the TV stats. The customer will be responsible for updating the Dashboard with the reports required which could be from any of the reports provided as standard or custom reports that you may wish to write yourself after the project has completed.

NOTE: The cost of a Raspberry Pi/TV (and configuration thereof) and any other required hardware is not included in the cost of this implementation project.

It would make Training/Go-Live more effective if the TV is installed and connected to a Raspberry Pi before your Workbooks Consultant arrives on-site to start the project.

CASE MANAGEMENT
& Reporting

The ‘JumpStart for Customer Service’ database is built with pre-configured Case Management, including the standard management reports you need to manage a Customer Service Desk.

The Case record is at the core of this functionality, allowing you to record details of the correspondence you might have with a client from the initial query right through to resolution, including:

- Owner (assigned to), priority, impact, product area and status
- Response and resolution targets
- Primary contact
- Description of the query or problem
- Resolution
- Activities i.e. actions the agent has completed to resolve this Case

In the ‘JumpStart for Customer Service’ database all open Cases records should have an open Activity record, describing the actions taken and the next steps with an appropriate due date, which is visible to the client in the Case Portal (if you decide to use this option). The combination of Case and Activity records is what drives a successful Case Management process to ensure all queries are being followed-up and resolved within the given SLA timescales.

The pre-built solution includes 4 main Dashboards that can be used for Case Management:

- Customer Service Agent Dashboard – to provide the Agents with a “To-do” list they can work from and prioritize their workload effectively
- Customer Service Line Manager Dashboard – for management to help the day-to-day running of the Customer Service Desk
- Customer Service Management Dashboard – for senior level management to understand how the Customer Service Desk is performing and to provide a more strategic overview of what is happening within the team
- Customer Service Desk TV Stats

CUSTOMER SERVICE AGENT DASHBOARD

The “Customer Service Agent Dashboard” provides an overview for an individual agent on their Open Cases and Activities, essentially providing their To-Do list. The Dashboard contains the following reports:

- My Open Cases: Follow-up Required
- My Open Cases: Due First Response
- My Open Cases: Due Resolution
- My Open Cases: Missed First Response
- My Open Cases: Missed Resolution
- Cases for Action: This is essentially a team-wide report that can be used by the Agents to work out what to do next if they have resolved everything on the individual “My Open Cases” reports

CUSTOMER SERVICE LINE MANAGER DASHBOARD

In addition to the Customer Service Desk Agent Dashboard, the pre-configured database includes a “Customer Service Management Dashboard” to support the day-to-day running of a Customer Service Team. This Dashboard includes the following reports:

- Cases by Agent with no response (due in the next hour)
- Cases by Agent with no resolution (due in the next hour)
- Escalated Cases i.e. require management intervention
- Cases by Agent with missed response
- Cases by Agent with missed resolution
- Closed Cases with no resolution (exception report)

CUSTOMER SERVICE MANAGEMENT DASHBOARD

This Dashboard is designed to help a Senior Management Team understand at a high level how the Customer Service Desk Team are performing and includes the following key reports:

- Cases by Week i.e. number of Cases raised vs number of Cases with no response/resolution, number of closed Cases
- Cases by Month i.e. number of Cases raised vs number of Cases with no response/resolution, number of closed Cases
- Cases by Week – the same as above, split by Agent
- Cases by Month – the same as above, split by Agent

CUSTOMER SERVICE DESK TV STATS DASHBOARD

This Dashboard is purely used for automation purposes and is used to drive a set of reports that might appear on a TV screen within an office environment using a Raspberry Pi. See the Case Management TV Stats section for further information. This Dashboard will initially be blank but can include any of the reports defined in the following sections: Agent Dashboard, Line Manager Dashboard and Customer Service Management Dashboard.

DATA *Migration*

You may already have client data stored within an existing system such as Organizations and their important contact details with relevant People. This data can be migrated into Workbooks Organizations and People records so that Cases can be created and related against them. Going forwards, new People and Organizations can be created manually as new clients come on board. Our solution will automatically create new People records if they are not found when a client sends in an email (when using Email2Case) or submits a form via your website (when using our pre-defined Web Process mechanism, not when using Web2Case).

It is unlikely that you would want to migrate existing Cases as this information may be currently stored in a spreadsheet and is probably not going to be particularly useful going forwards as it is often not looked back on once the ticket is resolved, thus the migration of this data is excluded from this project.

This project does not include the migration of Customer Contracts (or the equivalent such as warranty or entitlement). If you are a large organization and have complex requirements around customer entitlement then unfortunately a JumpStart project is not the right approach for your business and we would encourage you to look at our other implementation options, see **here**.

IMPLEMENTATION *approach*

The 'JumpStart for Customer Service' implementation is designed to get your organization using the platform within 1 week. The implementation consists of 5 days of consultancy delivered over a 1 week period, followed by a 6th day delivered several weeks later, to provide additional support once the system has been in use for a few weeks.

Prior to the time on-site you will be provided with the Organization and People Data Import Templates to be populated with your data. This must be returned with data populated to Workbooks at least 5 days before the on-site session.

Your nominated System Administrator needs to have attended the Workbooks Level-1 System Administrator Training course (2 days at our Reading office), prior to the on-site session (ideally no more than 2-3 weeks before).

The initial 1 week period allows time for you to review the system and for you/your Project Manager to familiarize themselves with the setup of Workbooks between the Configuration/Build and Training/Go-Live dates. A typical timetable will be as follows:

Week 1	Overview	Description
Days 1 & 2	Configuration & Build	Typically delivered on-site, the objective in the 1st day of the project is to review the 'JumpStart for Customer Service' configuration with the client, agree any customization such as picklist values and any additional custom fields that are required and build the configuration. At the end of the day we will have a fully configured Workbooks database ready for training the following day. The system setup will include the following as detailed in sections above: • Case & SLA Management • Email2Case • 1 of the Web2Case options • Case Portal • TV Stats • Agent, Manager, Management and TV stats Dashboards
Days 2 & 3	Data Migration	Workbooks will carry out the import of client data for People & Organizations provided by the customer from all existing data sources providing they are supplied by the customer in up to 2x CSV files (1 x for People, 1 x for Organizations). NOTE: The customer is responsible for providing the data extract from existing systems and for cleansing the data. Workbooks can provide advisory services on how to do this but ultimately the preparation work is carried out by the customer.
Day 4	Training	Workbooks will deliver 1 x ½ day of on-site training for 1 x Support Team of up to 8 members where the training will cover best practice Case management. A further 1 x ½ day session for the Support Management Team (up to 4 people) as per above at a high level but also to understand how the solution works end-to-end and how they can manage their team using the various tools available in the solution. NB this is delivered on the same day as the team training.
Day 5	Go-Live & Support	On the final day, the Support Team will Go-Live with the Workbooks solution and a Consultant will walk the floor answering any questions from the team as they arise.

Based on the above your Workbooks Consultant will be on-site with you for a full working week.

The 6th day of consultancy will be delivered 2 to 3 weeks after the Go-Live date to meet with you, review progress and address any feedback that may have arisen with the implementation.

PROJECT *scope & cost*

PROJECT SCOPE

The scope of the 'JumpStart for Customer Service' implementation is defined in this document. The project is solely related to the configuration of Case records and the setup of a Case Portal (if required) - all other record types are excluded from the scope, but may be included if the customer purchases additional consultancy days.

For clarity, the following elements are specifically excluded from the scope of 'JumpStart for Customer Service':

- Configuration of any record type other than Cases
- Creation or modification of PDF Templates
- Email Marketing & Marketing Automation
- Workbooks Web Insights
- Any automated Workflows or Web Processes beyond what is mentioned in this document

PROGRAMME COSTS

The 'JumpStart for Customer Service' program includes:

- 6 x days of implementation consultancy at $1,400 per day
- 1 x Workbooks Level-1 System Admin Training Course (2 days)

The total cost for the 'JumpStart for Customer Service' program is $9,800 + VAT + Expenses. Expenses will be charged in line with our standard policy, set out in our **terms of service**.

FUTURE PHASES
and Add-ons

The scope of the 'JumpStart for Customer Service' implementation project allows for any business to quickly set-up and run their Customer Service operations, leveraging best practises. Once this has been implemented, there are many areas within the solution that you may wish to consider enhancing further. This section identifies a few of the areas that you may like to implement in the future or in addition to what is mentioned in this document. A Workbooks Consultant can help with any of the above items and advise on the best solution for achieving these requirements. Please contact us if you are interested in hearing more about any of the following solutions.

CASE SURVEYS

When a Case is closed, Workbooks can automatically send a link to a pre-defined survey to capture client feedback on the service that your Team provide. This survey can include the relevant Case number and client contact details to personalize the survey. A survey can capture useful stats such as the NPS score, so that it is possible to benchmark your business against similar businesses in the same industry.

Each survey response can be brought back into Workbooks as an Online Activity and related to the original Case and Person record so that you can have a full holistic view of your client interactions.

CONTRACTS + ENTITLEMENT

In Workbooks, you can track a client's entitlement and the service level they have purchased on a Contract. A Contract can be related directly to a Case record in Workbooks which can then be used operationally to help your Customer Service Agents offer the correct level of service to your clients. For instance, you may wish to enforce stricter SLAs for clients that have purchased the "Gold" service level compared to the "Bronze" level or you may wish to track whether a product is under warranty and entitled to support from your team.

CTI INTEGRATION

Workbooks can integrate with VOIP services such as Natterbox or Mondago. When a customer calls in to your service desk, Mondago can search your Workbooks database for the relevant record and pop up within the desktop who is calling, allowing you to create a Case record quickly and easily which is related to the correct contact. If you opt for using Natterbox, call recordings can be setup and Activity records can be created against the Person/Organization to whom the call was received from or made to with details of the call.