



Customer Call Scheduling



The Need

Managing customer calls, whether it be as part of regular telesales schedules or responding to a one-off request for technical information, is at the heart of good customer relationship management.

The Solution

The m-hance Customer Call Scheduling module offers sophisticated call management facilities, via simple implementation and set up routines, that radically improve customer contact management giving immediate benefits for sales and service.

Key Features:

- Call schedule management

Schedules for customers and prospects can be generated and attached to a specific user or multiple users. These may be for a one-off event or could automatically generate a next call date and time, based upon a recurring pattern, e.g. daily, weekly, and monthly.

Debtor / Prospect ID	Name	Address	Call Date	Time	Phone No.
NE01236	A G Machining Services	MAIN	19/01/2009	00:00:00	01207 291800
NE01108	Howarth Sheet Packaging & Fabricati	MAIN	19/01/2009	17:38:00	0191 4566000
NE01180	Sanovo Egg Products UK Ltd	MAIN	26/01/2009	00:00:00	01670 594848
NE02238	Three Blind Mice Ltd.	MAIN	26/01/2009	00:00:00	0161 7861729
NE01424	A and P Group	MAIN	02/02/2009	00:00:00	0191 4153111
NE01668	Cabis Solutions Ltd	MAIN	02/02/2009	00:00:00	01434 325244
NE02031	Crosby Signs	MAIN	02/02/2009	00:00:00	0161 7898131
NE01402	Hygienic Equipment Ltd.	MAIN	10/02/2009	00:00:00	01642 225799

Call Schedule ID	Reason Code	Description	Time	Action Taken	SDP Type	SDP Number	User ID
HOUSE	A/C MGMT	Account Management Call	11:01:14				kayleighm
HOUSE	A/C MGMT	Account Management Call	11:00:53	Other			kayleighm
HOUSE	A/C MGMT	Account Management Call	10:50:00				kayleighm
HOUSE	A/C MGMT	Account Management Call	10:49:33	Other			kayleighm
HOUSE	A/C MGMT	Account Management Call	10:49:33	Other			kayleighm
HOUSE	A/C MGMT	Account Management Call	16:53:21	Create Order	Order	ORD0049076	bishopc

- Call control

Permits the user to 'select' a customer from a schedule so that even where multiple users are working to a schedule there is no possibility of doubling up on calls.

- Action linking

Once contact is made (or not), the user can go straight to a series of pre-defined activities, including creating an order, quote or generating a request for later call-back.

- User-defined results

Users may set up unlimited response categories for later analysis.

- Follow-up calls

Users in one schedule can generate a call in another schedule with the call itself linked to a document such as an order or quote.

- Detailed history

Each contact (or failure to contact) can be supported by a date and text. Users may scroll through such text either for a specific schedule or show all contact with the customer.

- Call schedule import

Having generate an identified list of customers or prospects, perhaps using Crystal or Explorer, this simple tool allows the user to import the customer data into a named call schedule to generate a one-off campaign.

What It Means For You

The flexible design of this software demonstrates that it has the ability to meet a wide variety of user needs.

- Telesales schedules

Contact customers at the correct times to tie in with their requirements and the organization's delivery capabilities. Manage exceptions, call-backs, post follow up calls to reps, technical assistance and customer service etc. In addition, you can also measure the effectiveness of call-outs.

- Marketing campaigns

Use the reporting power of m-hance to pinpoint the target audience. Generate one-off marketing campaigns that can be actioned by a team of representatives if necessary.

- Delivery optimization

Even when customers call in with their orders the system can be set up to recognize that there is a call schedule to be updated. At the chosen review time, those who have not called in as expected may be easily identified. Calls may then be made to selected customers in order to make up economic loads, or the facility may simply be used as an early warning of possible customer problems.



m-hance provides m-hancements (formerly known as Trinity Myridas) to maximize the value customers realize from their Microsoft Dynamics GP investment. m-hance provides business software solutions which enable Microsoft Dynamics users to save time, cut costs and increase efficiency. m-hance is one of the largest Microsoft Dynamics partners in the world and is recognized as a successful and accredited solutions developer. m-hance provides Microsoft partners across 20 different countries with integrated software modules. These solutions extend the functionality of their clients' core Dynamics GP application with m-hancements covering Distribution, Telesales, Inventory, Procurement, Bank Management, and Document Management.

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