

## Chapter 2



## Service Reminder & Follow-up

# Chapter Overview

This chapter explores how managers can take service initiatives and keep the customer engaged.

## Motors and Responsibilities



### Customer Service Manager

- addressing service issues in the most efficient way.



### Service Marketing Marketing Function

- making the customer feel welcome.



### Digital Assets

- helping us to build goodwill through digital platforms.

Using these various approaches, companies can create greater value for their customers, increase the quality of their products and improve customer engagement levels.



7

### • Purpose

Business managers get the service managers of their respective businesses to carry out their tasks.

### • What You'll See

• how businesses and service firms choose their operating processes.

### • Why It Matters

the goal is to make the service process easy for customers, build trust and encourage them to use the business again.

# Process Flow

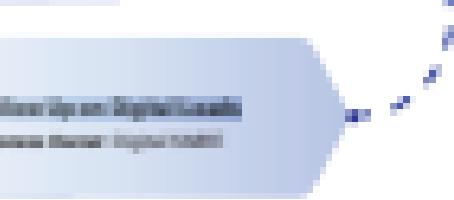
**2.1**

Service Requests  
Process Requests



**2.2**

Follow-ups and Supplements  
Process Requests



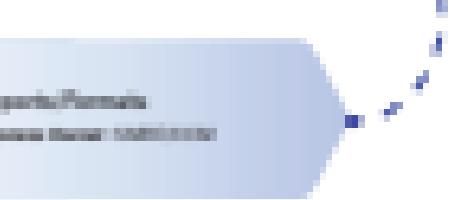
**2.3**

Communication with  
Last Customer  
Process Requests



**2.4**

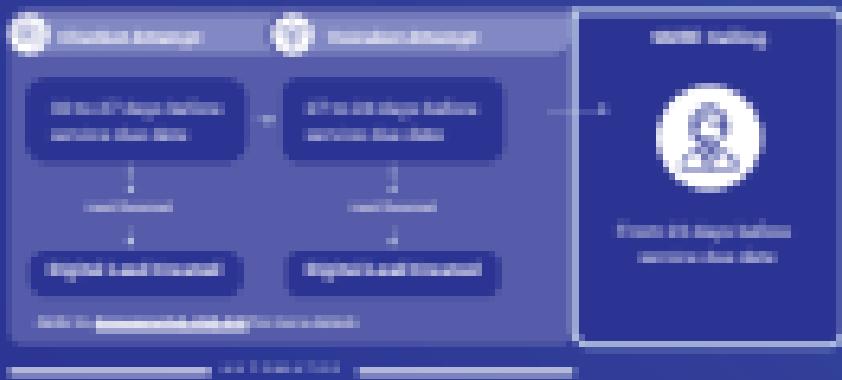
Report/Emails  
Process Requests



## 2.2: Service Reminder

What will the users  
experience every day  
when we make  
changes to service

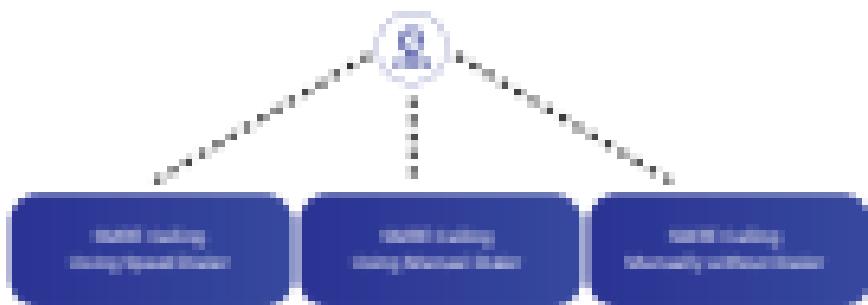
This section highlights how to ensure timely reminders for customers about their upcoming services. It also emphasizes satisfaction and engagement.



### Service Reminder - Calling by WhatsApp

The following plan for service reminders after service booking can be by the customer and customer service representative for the user to make follow-up calls.

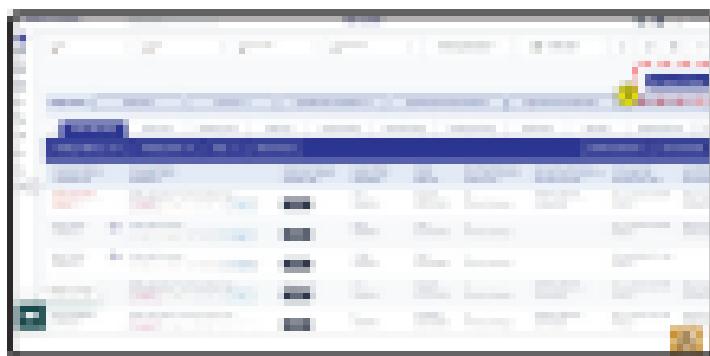
WhatsApp messaging (WHoC) can be done using the following methods:



## 2.1.1: Share Calling Using Speed Dialer

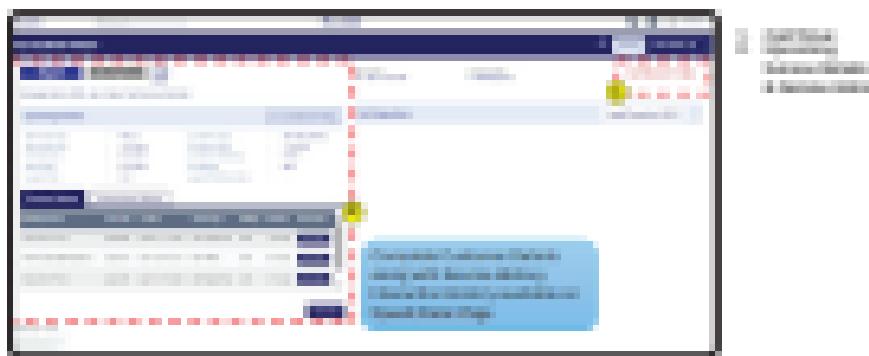
### Step 1

Log in to your account and open the calling page.



### Step 2

- Select the 'Speed Dialing' option to make connections using speed dial:
- Click on the 'Speed Dial' icon located at the bottom right of the contact list.
  - Enter the customer number or name in the input field.
  - Press the 'Enter' key to begin the connection.



### Step 3

- Once the call is connected, a connection will be made to the customer using the selected steps:
- Deliver the 'Hello' greeting message to the customer.

Once the customer has answered the call, they can respond by saying 'Hello' again.

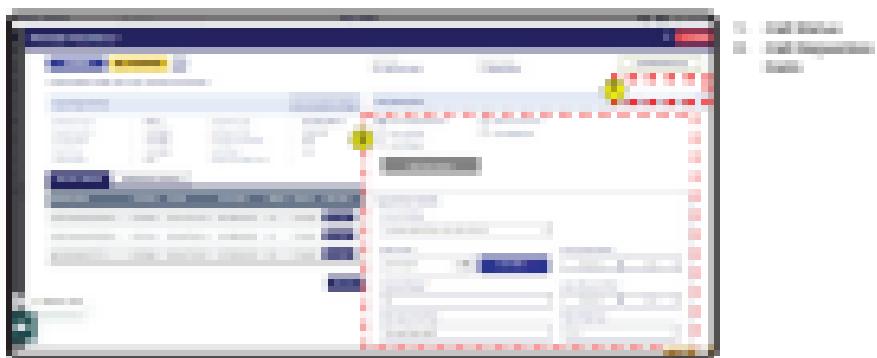
### Step 6

Extract the relevant and necessary information required to generate a report.

- Business Agreements
- Bill of Lading
- Log Entries
- Measurement Details
- Shipping Details

### Step 7

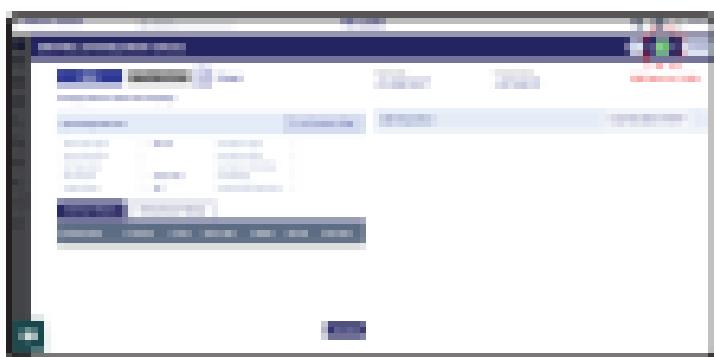
With the customer response analysis complete, the process continues.



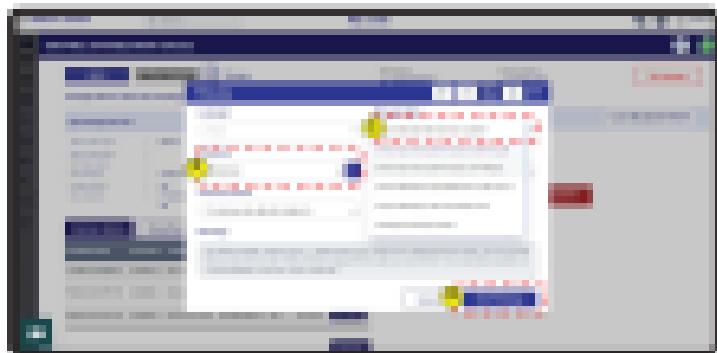
### Step 8

Information can now be extracted from the bill of lading table to generate a report.

- Extract the technology of the table to generate the message event.



- Start the application management
- Start the instance process editor and click on "Read"



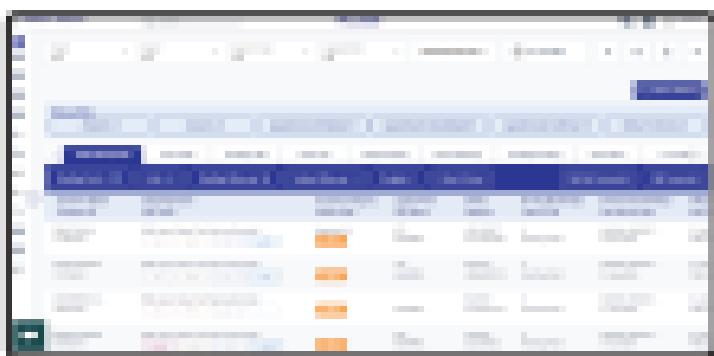
Step 7  
Start the instance process editor.

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## 2.1.2: SMRE Calling Using Manual Dialer

### Step 1:

Log in to the system as a valid user (superuser) on the testing host.



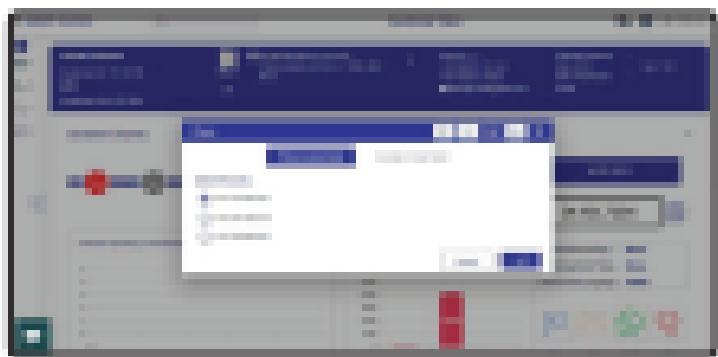
### Step 2:

Click on 'Metrics' and you'll open the metrics page containing all the necessary information about the resources.



### **Step 2**

Open the **Customer Information** page.



### **Step 3**

Select customer **Booking creation** on the **Tool bar** to open the **Booking creation** screen.



### **Step 4**

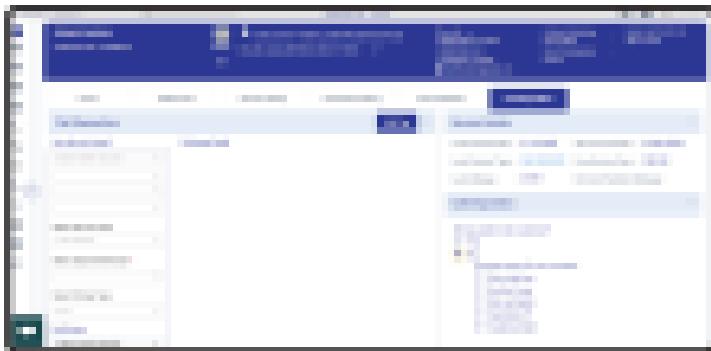
Open the **Flight Reservation** table to the customer using the standard menu.

- [Select the \*\*Flight Reservations\*\* screen in which you're booking the customer.](#)

### **Step 5**

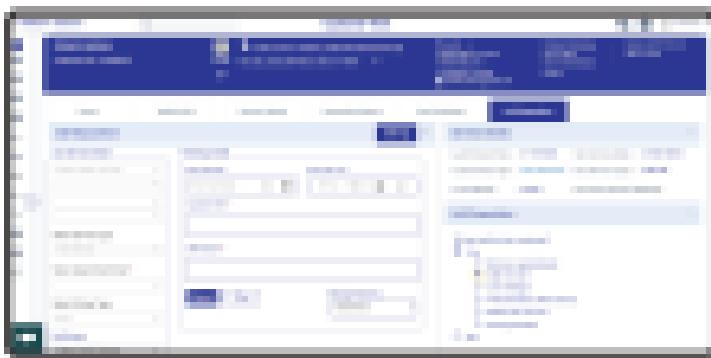
Open the **Flight Reservation** table and select the appropriate flight reservation system based on the connection with the customer.

- [Select the connection to the customer when the appropriate reason for travel.](#)



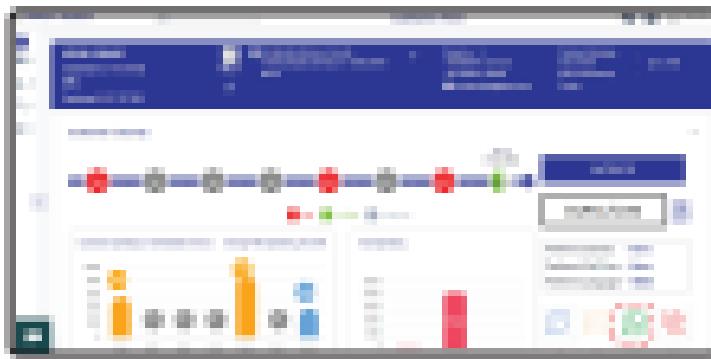
### Step 8

Get the correct response and your names in the power BI file.

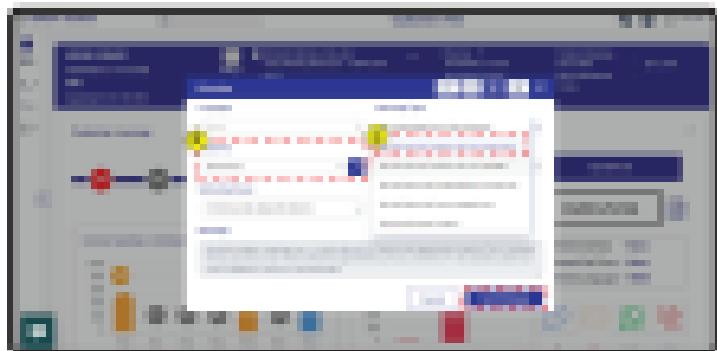


### Step 9

Sharing service and audience share using the share on a dashboard menu  
- Selects 'Share' or the 'Share' icon open the sharing screen.



- Start the application management
- Start the instance process editor and open a model

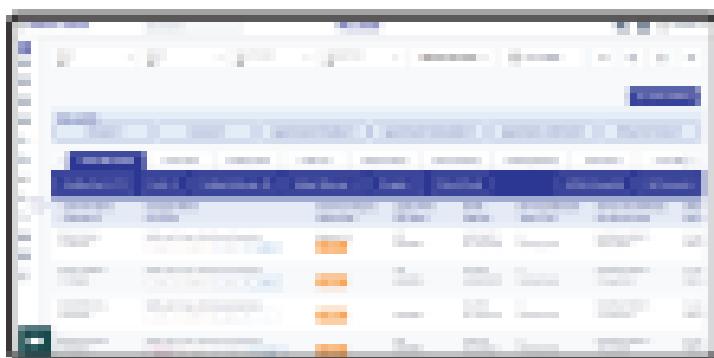


Step 9  
Start the instance process editor.

## 2.1.3: SIMPE Calling Without Dialer

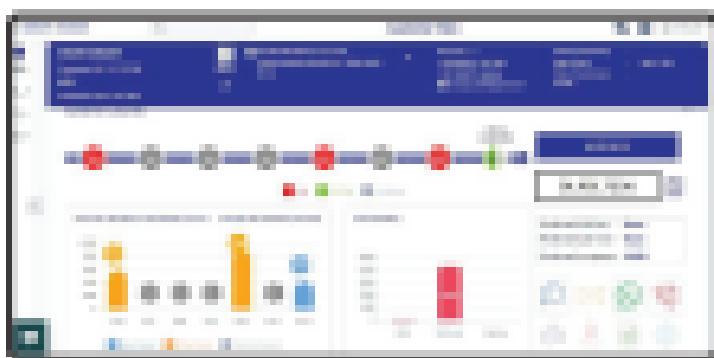
### Step 1:

Log into the main interface and navigate to the **Calling List**.



### Step 2:

Click on the contact link to open the contact page containing all the necessary information about the contact.



### Step 3:

Select a number from the contact list and call the number using your phone.

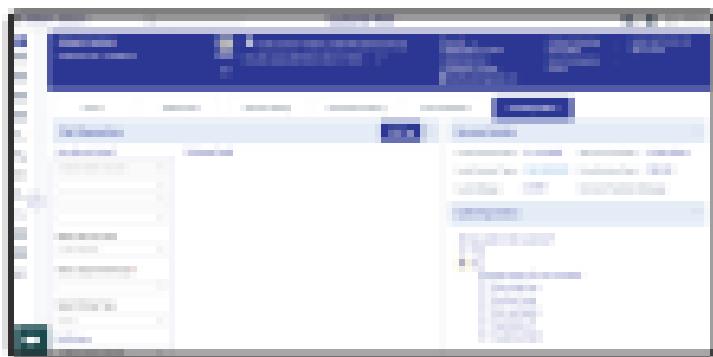
### Step 4:

Once the call is answered, take the number using the handset key:  
• **Volume Up/Down** to increase/decrease volume on the handset.

### Step 3

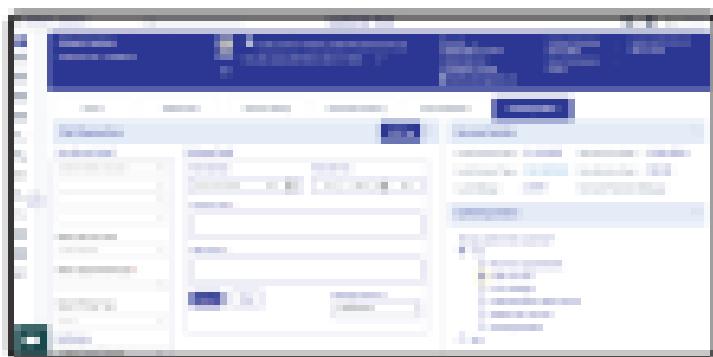
Select the appropriate customer service response option based on the customer's needs.

- When all content has been entered in the customer select the appropriate button below.



### Step 4

Enter the customer response and press enter in the greater form.



### Step 5

Press enter to complete the task.

[Customer Response](#)

# Script

## 10001 Calling For Service Requests

Good morning/afternoon/evening [Customer Name]! I hope this message finds you well.

I am calling you today because I have a few questions about your service.

### 1. What's been going on?

Firstly, I would like to know what has been going on at your place? Is there anything unusual or different about your service?

### 2. What's been happening?

Secondly, I would like to know what has been happening at your place recently? Has anything unusual happened recently or changed in regards to your service? If so, can you tell me about it?

### 3. What's been going on lately?

Thirdly, I would like to know what has been going on lately? Has anything changed in regards to your service recently?

## Service Requests for the next month or so

What are the main service requests that you are expecting over the next month or so?

1. Installation of new equipment.
2. Maintenance of existing equipment.
3. Troubleshooting existing equipment or service issues.

## Maintenance Requests

### Water Heating Unit

- 1. Maintenance of existing and ongoing maintenance that you planned for in May 2017. What did you do?
- 2. Maintenance of the water heating unit. What you think the cause of the issue? Please identify if you have any history of any issues with the equipment and by date of occurrence. Are there any specific areas or components that you think may be causing the issue?
- 3. Maintenance of the water heating unit. What do you expect the outcome of the maintenance to be? What do you expect to happen after the maintenance is completed? How long will it take for the issue to be resolved?

## **Part II: Walking and Sleep Schedule**

1. **Walking schedule:** When you're sleeping or going walking around the house? Request by saying **when** or **where**.
2. **When:**  
When do you sleep at night? When you have to go to the toilet?
3. **Where:**  
Sleep where the person is walking? (Sleeping room with me?)

## **Part III: Sleep**

### **What time do I wake up?**

1. **Walking schedule:** When you're sleeping? Or are the times of when I'm sleeping? Request by saying **when** or **where**.
2. **When:**  
When do you sleep at night? When you have to go to the toilet?
3. **Where:**  
Sleep where the person is walking? (Sleeping room with me?)

The person will continue the questions until they get the information they want.

Thank you for your time! I hope you enjoyed your walk and  
I hope you had a nice day!

Goodnight again,  
Sally

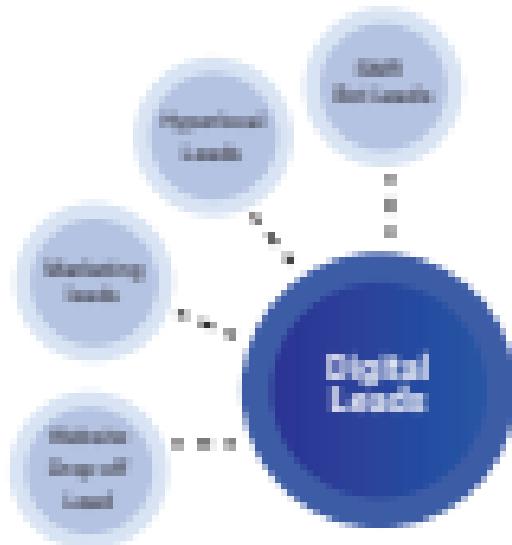
## 2.2: Follow Up on Digital Leads

After initial engagement, follow up every day. When to do this?

This section explores how to continue connecting by connecting all digital leads within a day of receiving them. This can follow up on a previous customer's recent engagement with you or the previous section.

- 1. **Assessing Response:**  
Determining what action they received (either through phone, email or messaging) or acknowledging their inquiry.
- 2. **Personalizing Response:**  
Personalizing the customer's name and offering relevant information based on their inquiry.
- 3. **Follow-up Action:**  
Booking the customer's next booking or appointment or making a plan to ensure that customer is a repeat customer.

### 2.2.1: Various Sources of Digital Service Leads



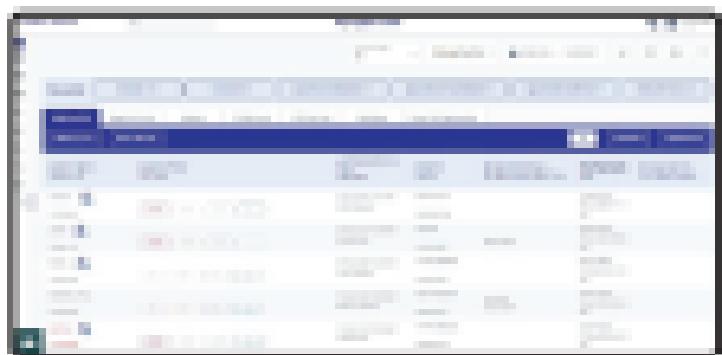
## Following Process

### Step 1:

Logon to the CRM through which Opportunities are managed.

### Step 2:

From My Opportunities, all Opportunities will be available on this page.



From this page, you can view the detailed status of every lead.

The basic selling process for all Opportunities is similar to the service model described above. However, the key highlights for each opportunity type are as follows:

### 2.2.2: SMM: Both Leads:

For both leads, the CRM will address the specific issues on the recording of contact details to the customer. The CRM uses these recordings to understand the next interaction that will place on the lead.

### Step 1:

Logon to the CRM through which Opportunities are managed. The list of opportunities will be shown. All other services similar to customer will be of importance.

### Step 3

Click on **Interactions** and the open the **Interaction page**.



### Step 4

Go to the **Interactions History** section to keep interactions with the customer.

### Step 5

Click on **New Record** to access specific collaboration, including the current recording.

### Step 6

Enter the **They Name** reference to the recorded recording.



### Step 7

Set the **Customer** and **Agent** references.

- 1. [Customer](#) [Agent](#) [Recording](#) [Interaction](#) [New Record](#)

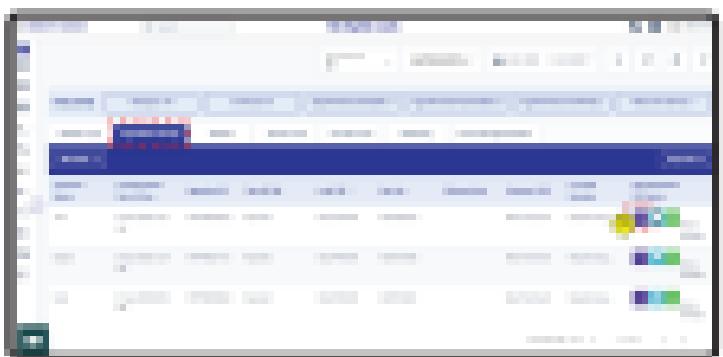


## 2.2.2 Hyperlocal Leads

Hyperlocal leads are additional opportunities under the lead type section of the opportunities screen. These leads may need to verify specific organization names from customers during the lead creation process.

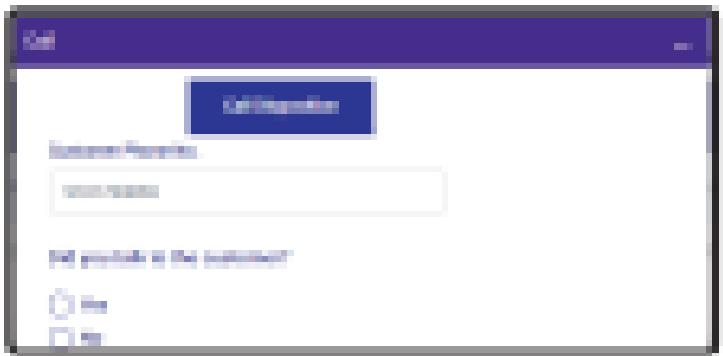
### Step 2

Move your cursor to the Opportunities tab on the Key Hyperleads page to access Hyperleads.



### Step 3

Move your cursor over the New button equivalent. The available new lead screen will be displayed.



### Step 4

Move your cursor to verify that a new lead opportunity has been created.

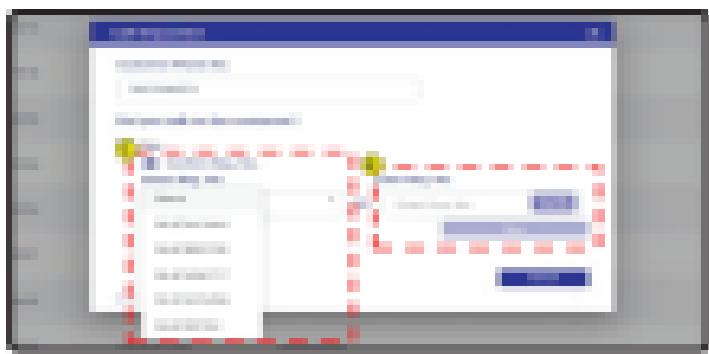
### **Step 6**

Follow steps 1 to the customer number after the digit 9, then the state confirming the customer.

- If the registration number entered by the customer matches the correct registration number, continue process.

### **Step 7**

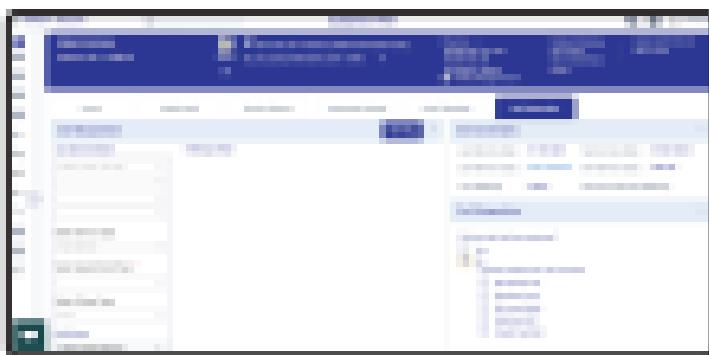
Click **Find!** to confirm the vehicle registration number and open the customer page.



### **Step 8**

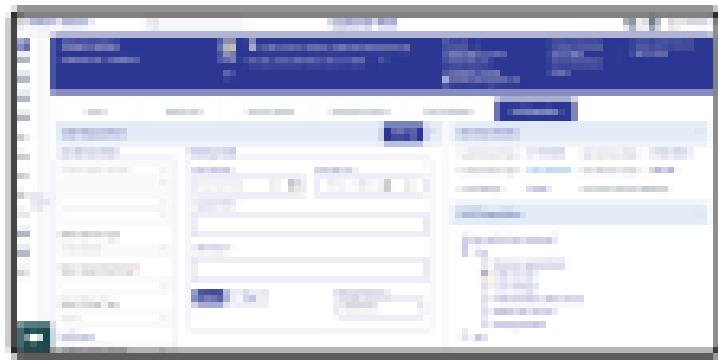
Click **Find!** to find the registered car and select the appropriate all deposition option based on the customer with the customer.

- Select the information to be connected to the customer under the appropriate reason for the failure.



### **Step 9**

Fill in the customer response and press **Submit**.



### Step 1

When you click it to complete the sale.

Now the process of my customer will be completed successfully. And the sales report will be generated for my customer automatically.

## 2. 2.4: Website Drop-off Leads

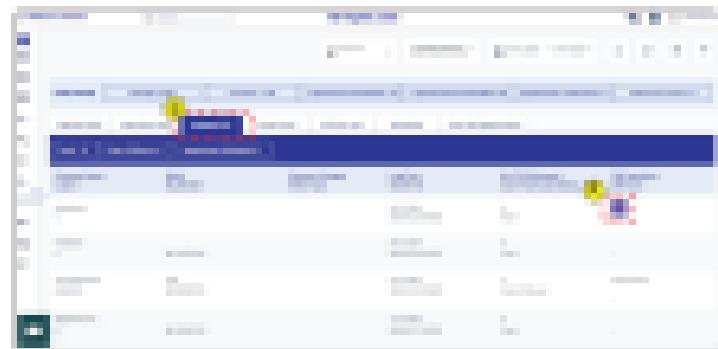
The website drop-off leads, the customer registration number for a lead may not be available sometimes. Hence, the CRM user needs to copy the customer registration number from the customer during the flow and fit the customer for more leads.

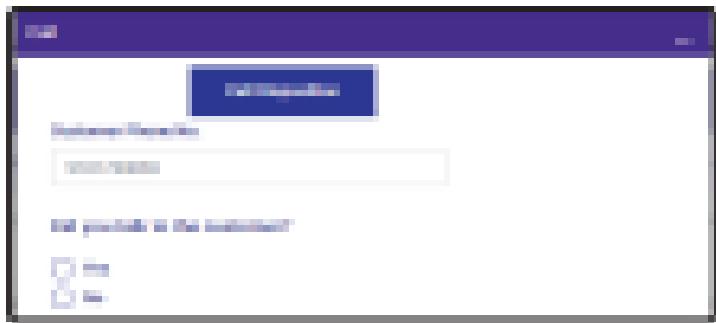
### Step 1

Acceptance leads from my digital sales program source website drop-off leads.

### Step 2

When the staff has no option about the available customer contact number will be displayed.





#### Step 8

Ask the customer to verify their mobile registration number.

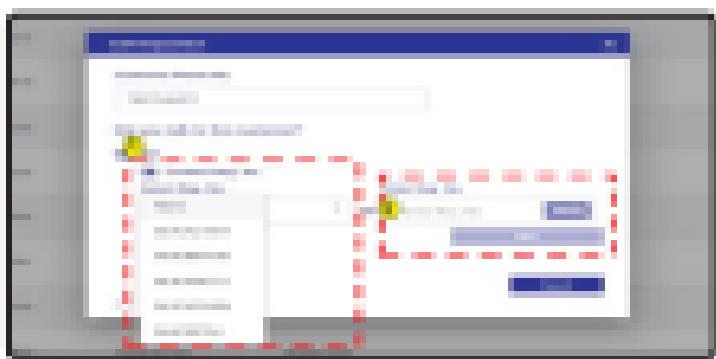
#### Step 9

When prompted the customer can enter will be displayed below the search results by the customer:

- If the registration number displayed by the customer is not on the list, enter the registration number in the last position.

#### Step 10

Ask the customer to confirm the mobile registration number and open the customer page.

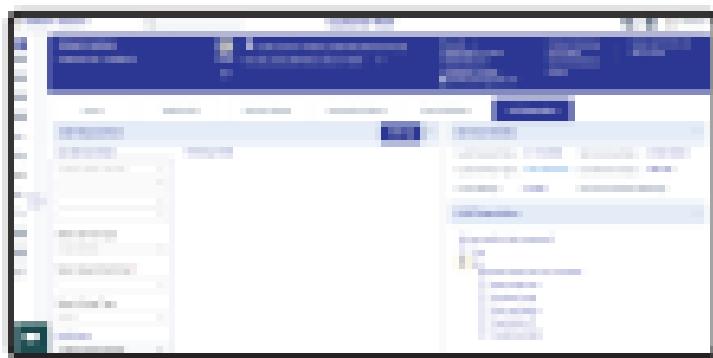


### Step 8

Enter the relevant information and attach the appropriate file type from your customer's response onto the message.

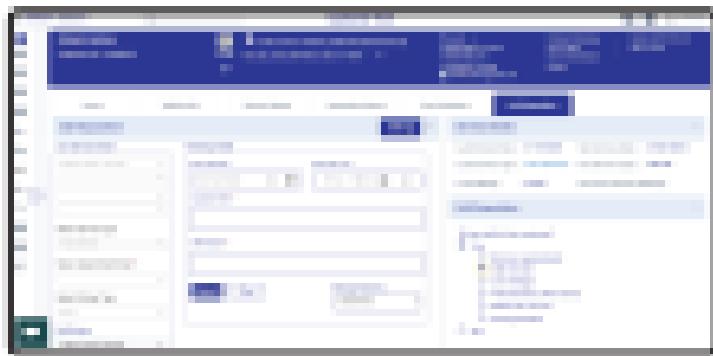
→ Enter the relevant file to be attached to the message under the appropriate section below.

→ Enter the relevant file to be attached to the message under the appropriate section below.



### Step 9

Enter the customer response and press enter in the preview field.



### Step 10

Press F12/Alt+F10 to complete the call.

Note: The process of capturing responses from customers can vary depending on the specific configuration of your organization.



## 2.2.5 Marketing Leads

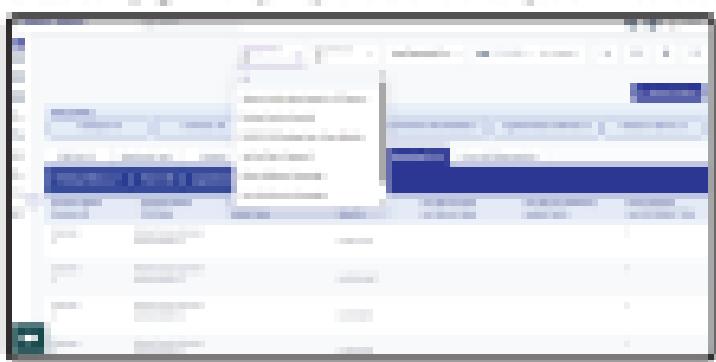
Marketing leads are prospective users visiting campaigns. Follow the steps below for proper handling:

### Step 1

Go to the "Marketing Lead" section My Opportunities page.

### Step 2

Select the campaign name or project name from the list options available on the right side page.



### Step 3

After selecting the campaign, one of the options related to the campaign will be displayed.

### Step 4

Set the status of selected campaign.

→ [Edit my lead status](#) button → Set the status of the selected campaign.

— — — — —

## 3.3: Communication with Lost Customer

What will be done now?  
What's the plan?

This section provides you the suggested template to communicate with customers who have stopped communicating with you or have not responded to your previous communication. You can also use this template to encourage them to continue their relationship with you.

### Communication Channels

- Message
- Mail

These channels should be used to reach out to lost customers and encourage them to continue their business opportunities.

### WhatsApp Template

Message Subject:

Reconnection Request

Here is a sample WhatsApp message template for you. You can use this template to say hi, greet them back, and ask about something.

➡ Please remember to use your friendly and professional tone.

WhatsApp message content:

Hi [Customer Name]! How are you doing today?

How's the business? I hope it's been great so far.

How's the family? I hope they're all good and happy.

Always your welcome presence makes us very happy to do business.

Thank you for choosing [Business Name].

We look forward to seeing you.

### EMAIL Template

Message Subject:

Here is a sample email template for you. This template is used to quickly connect with your customers.

Subject: Reconnection (Email)

Reconnection (Email)

Reconnection (Email)

Always your welcome presence makes us very happy to do business.

Thank you for choosing [Business Name].

### 2.4.1: ISMR: Boat Status Report:

The monthly status report can be used to monitor the status of all the boats present through the station network.

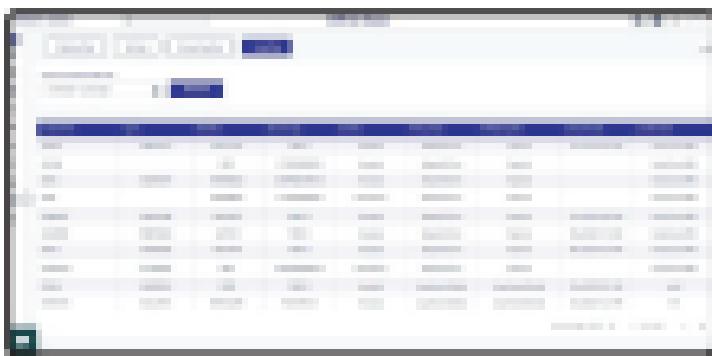
#### Report contents (example):

##### Step 1:

Logon to Report - click the status Report in left.

##### Step 2:

Choose the day range for last day report and click on "Search" to get the report.



##### Step 3:

Click on the first boat report name in expandable form.

## 2.4.2-SMR Date Date Wise Report

View Details  
Print

The SMR Date Date Report will used to view the status of all the customers for particular date or interval period.

Steps to generate the report:

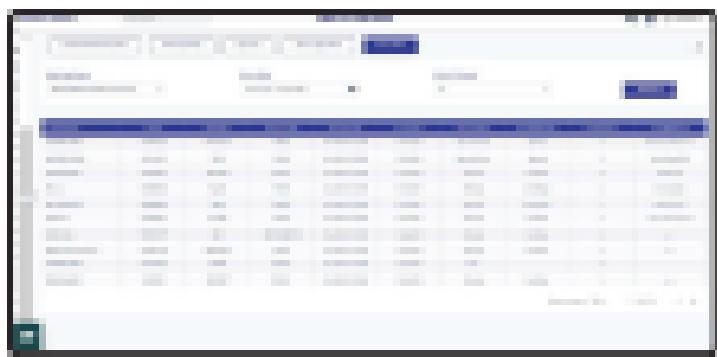
Step 1:

Move to the Report section tab.



Step 2:

Choose the report type (Marketing or Sales) based on which channel you want to measure.



Step 3:

Move to the "Download" button to get the report in a particular format.

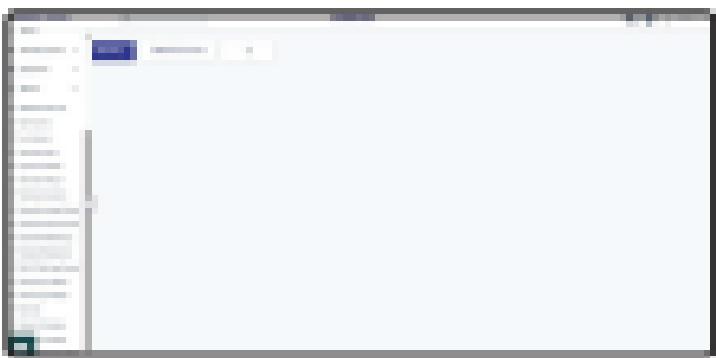
## 2.4.3: Due Vs Done Report

This report tracks the due versus completed services providing a clear measure of the service performance of the membership.

Steps to generate the report:

Step 1

From the top go to Reports > Due vs done



Step 2

From 'Milestone' (MemberType) and 'Service Channel' and 'All' or 'Members'

A screenshot of the same software application window, now displaying a data grid. The grid has a header row with columns labeled 'Milestone', 'Service Channel', 'Status', 'Due', 'Completed', and 'Remaining'. Below the header, there are approximately 15 data rows, each representing a different service entry. Each row contains values for the respective columns, with some cells colored green and others red, likely indicating different status levels. The overall layout is a standard spreadsheet-style table.

Step 3

Click on the 'Download' button to get the report in spreadsheet format.

## 2.4.4: Last Attempt Report

This report can be used to track NHTM productivity for a given time range, helping assess the effectiveness of labor deployment and resource utilization.

### Steps to generate the report:

#### Step 1:

Select type of report to last attempt.

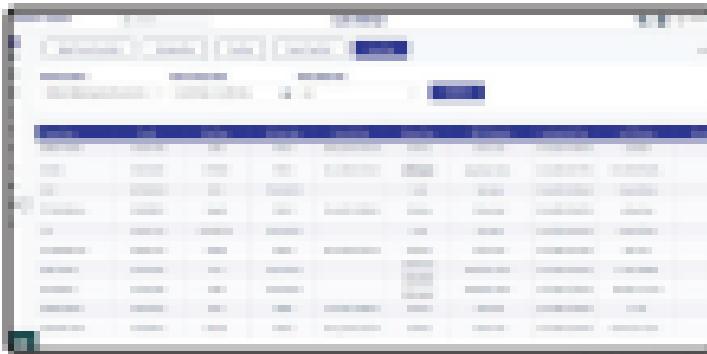


#### Step 2:

Select the report type as per requirement.

#### Step 3:

Choose Working (earlier type) and choose desired working hours.



#### Step 4:

Save as the download last attempt report in a particular format.

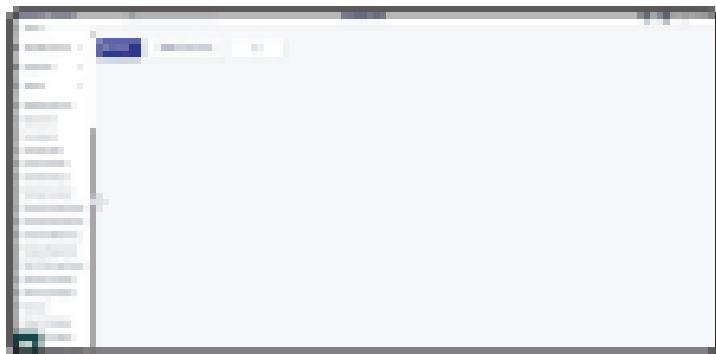


## 2.4.5: Hyperlocal Status Report

This report can be used to track the status of hyperlocal leads to ensure timely follow-up and closure. Please log in to generate the report.

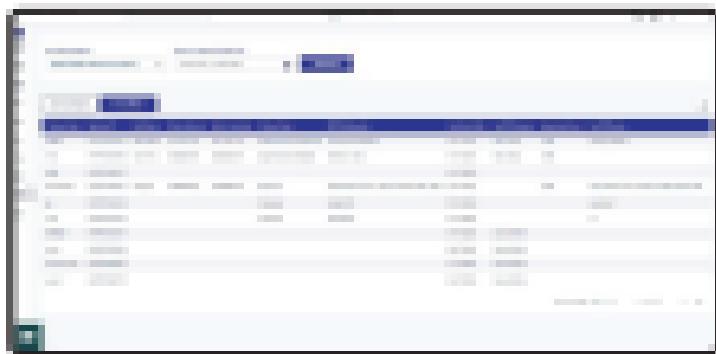
Step 1:

Log in to Logix, go to Reports > Hyperlocal status.



Step 2:

Select the tracking name (use the first few letters to narrow down).



Step 3:

Click on the download button to export the report to a spreadsheet format.

## 2.4.8: SWRI Performance Dashboard

This dashboard provides an overview of SWRI performance for the current month, helping customers prioritize and target investments.

### How to access the dashboard

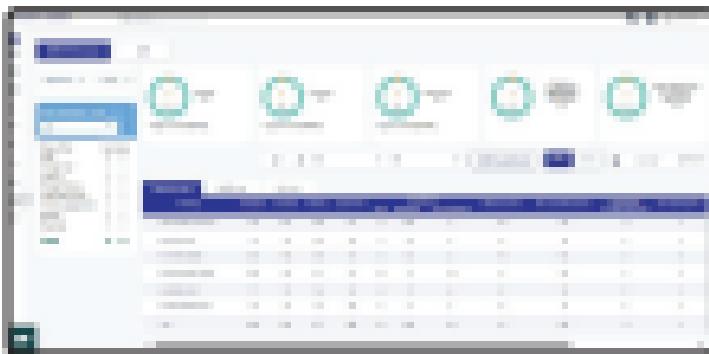
#### Step 1

In the top right corner, click the **SWRI Performance Dashboard**.



#### Step 2

Dashboard view shows all key performance metrics for various performance measures and its progress.



## 2.4.7: Monthly SMEI Performance Report

This report can be used to track SMEI performance for the current month.

**Steps to generate the report:**

**Step 1:**

In the top right corner, click [Reports > Monthly SMEI Performance Report](#).

**Step 2:**

Select the "Working Month" over the last three months (Aug, Sept, Oct, Nov).

**Step 3:**

Click on the "Download" button to get the report as a spreadsheet.

## 2.4.8: Distro Dashboard

This dashboard provides insights into disk utilization and file storage resources for the workshop environment hosts.

Steps to access the dashboard:

Step 1:

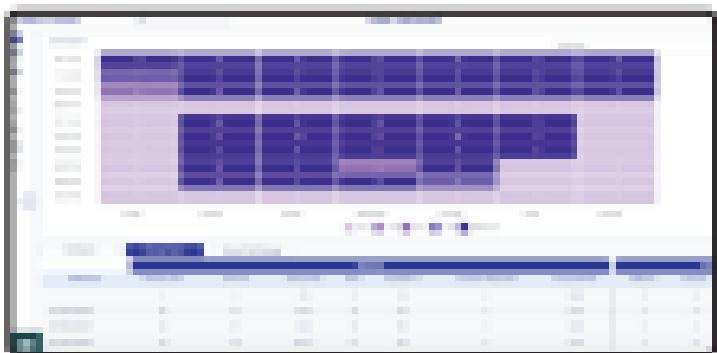
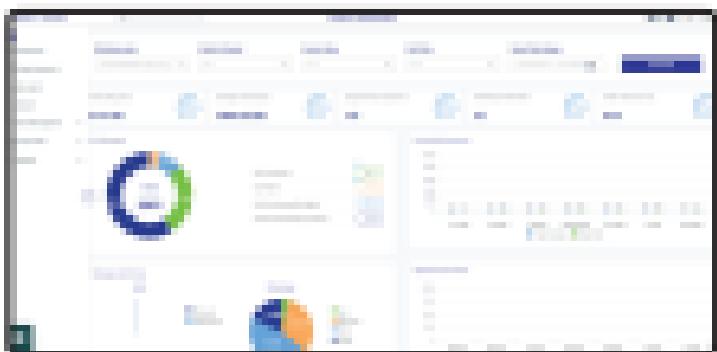
Logon to [Windows 7 machine](#).

Step 2:

From the "Taskbar", choose the "File Explorer" icon (green).

Step 3:

Open the "Shared Folders" and click "Workshop".



# Enablers

## 1. Identifying the Client & Stakeholders

The analysis and identification of stakeholders and their interests.

Step 1: Identifying Stakeholders

Step 2:

Identifying key stakeholders and analyzing their interests and potential influence on the project.

Step 3:

Identifying key stakeholders that have the highest influence over the project.

Step 4:

Identifying key stakeholders that have the most impact on the project.

Step 5:

Identifying key stakeholders that have the most influence over the project.

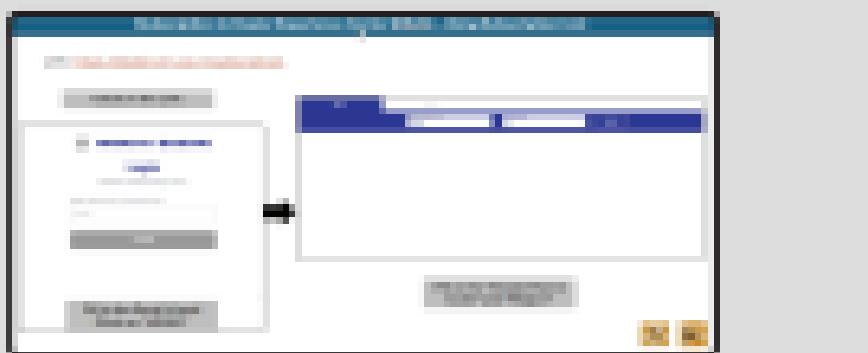
## 2. Identifying the Risk

The process of identifying the risks and the likely impact of those risks.

## 3. Identifying Key Resources

Step 1:

Identifying key resources required for the project.

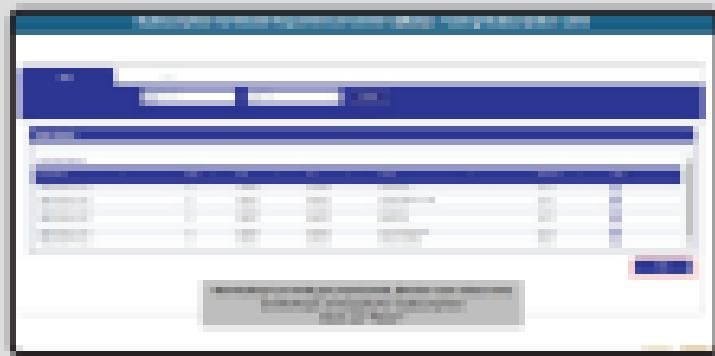


#### Step 2

Choose the file you want to upload and click "Open".

#### Step 3

Choose whether you want to upload it as a draft.

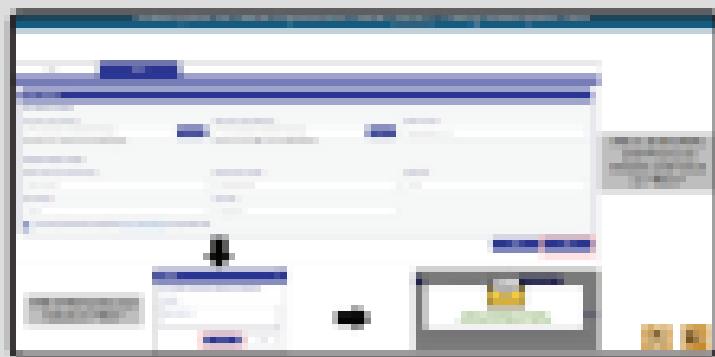


#### Step 4

Choose what to do with the document.

- Click on the original file and choose 'Save' or 'Save As'.
- Choose the Microsoft Office ribbon to choose the save options.

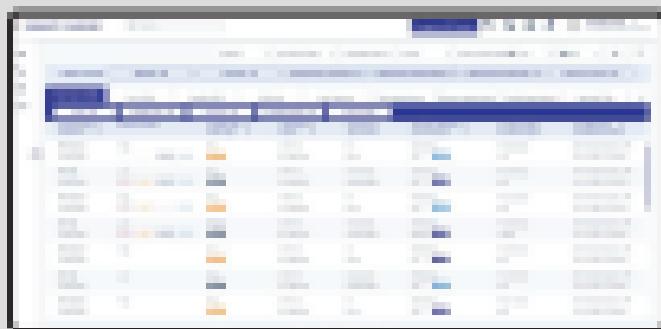
The watermark will be removed from the front of the document by default.



Step 1: Select the desired analysis method.

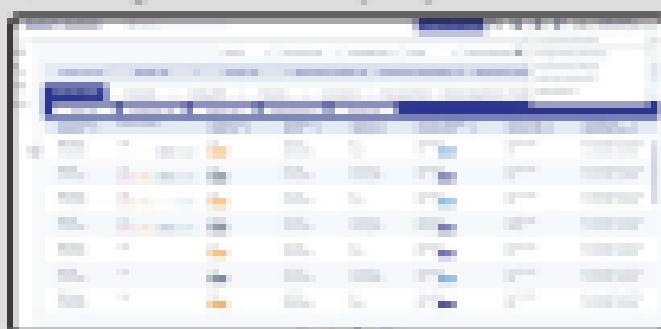
Step 2:

Select the desired testing analysis method and test.



Step 3:

Select the desired analysis method and test.



Step 4:

Select the desired analysis method and test.

Step 5:

Select the desired analysis method and test.

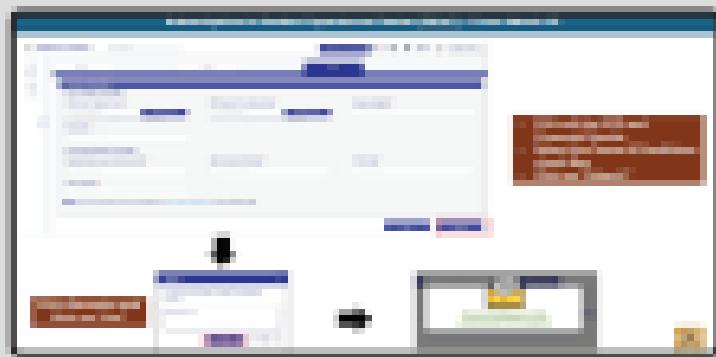


## Step 2

### Configure Marketing Automation

- Set up the segmentation and scoring rules.
- Design the funnel and automatically generate the workflows.
- Define the triggers to execute the automation process.

The marketing automation tool will appear by the end:



## 3. Marketing Mapping in the Sales Cycle

What will be the Marketing Strategy  
of your leads after?

Marketing and sales teams need to work together for increasing the efficiency of your business model. This can be useful for connecting sales to marketing, creating a smooth transition from one department to another, and improving lead conversion rates.

### Step 3

Integrate the sales system of the marketing automation tool with your CRM tool.

### Step 4

Choose the 'Sales cycle' and 'Marketing Strategy'.



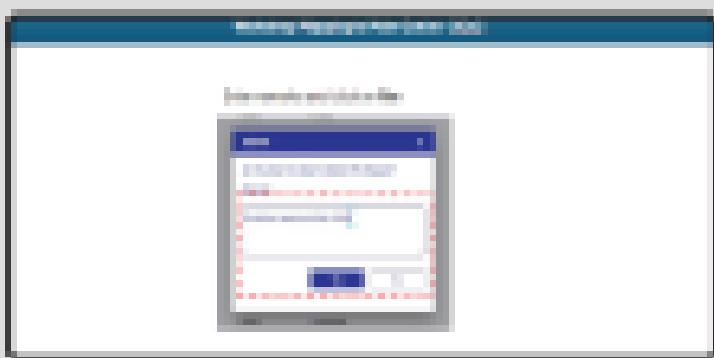
Step 8

Now we can copy the file to the destination machine.



Step 9

Now we can copy the file to the destination machine.



The copying operation will take some time depending on the speed of your network connection. The copied file will now be available on the destination machine.

That's it! You have successfully copied a file from one machine to another using the command prompt.

## A. How to Use the Toolkit

The toolkit includes:  
• How to use the toolkit  
• How to search

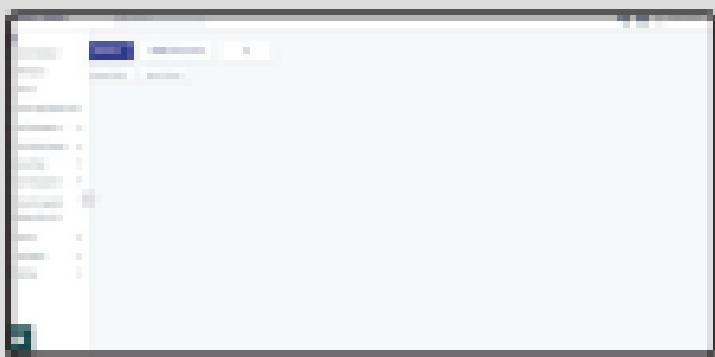
Multiple categories are developed to assist in identifying the most effective strategies for increasing student achievement. These include:  
• Instructional strategies for students and for identifying students at increased risk for academic challenges.

### Strategies

Support teachers' ability to utilize strategies across other categories and to target:

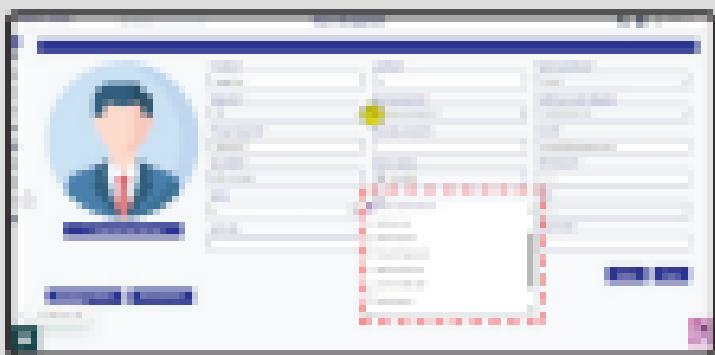
### Strategies

Search for the category you need and click "Search Results Strategy."



### Strategies

Search for the category you need and click "Search Results Strategy" (this may take some time depending on the number of resources available).



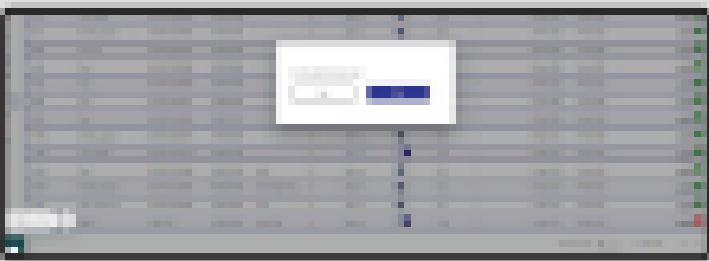
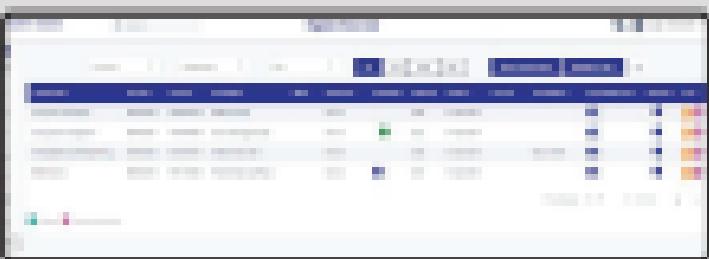
Step 1

Run Responses

Run New Management & Run Responses

Run Existing Management & Run Responses

Run Existing & Run Responses



1. Definition Allocation to RunID

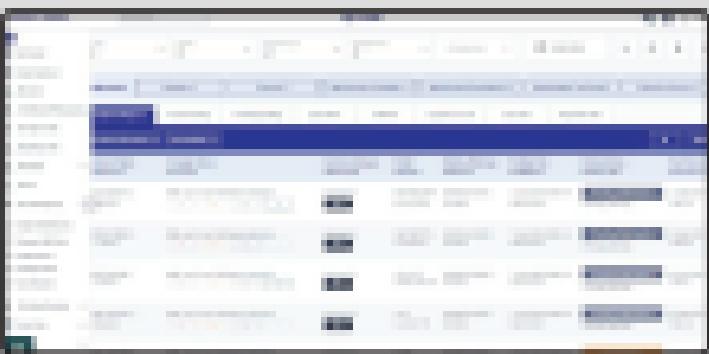
Allocation to RunID

Allocation to RunID

The Run Responses allocation to RunID entry will be displayed in the Run Responses Allocation to RunID screen.

Step 2

Run Responses Allocation to RunID Response - Response Run

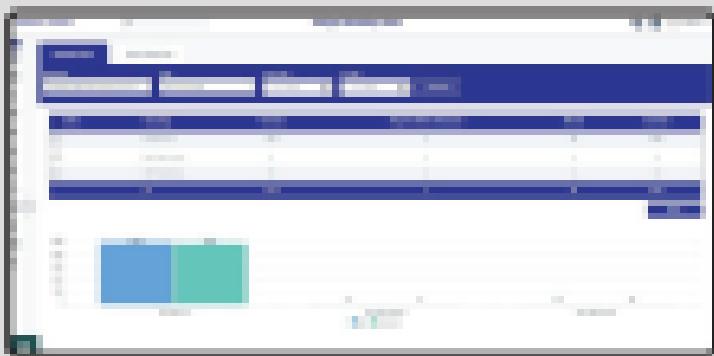


File

Format the current template by selecting Microsoft, Apple and Linux icons.

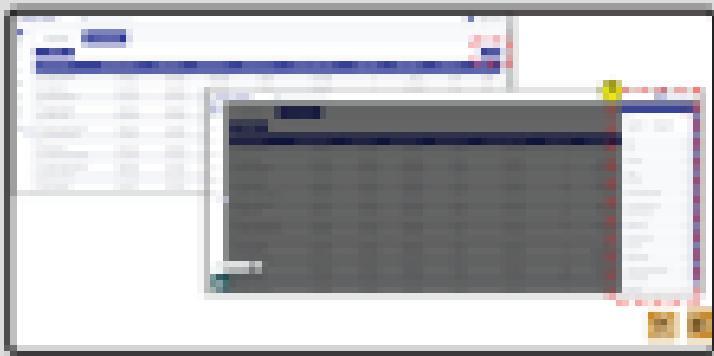
File

Format the template by changing the font color or font size.



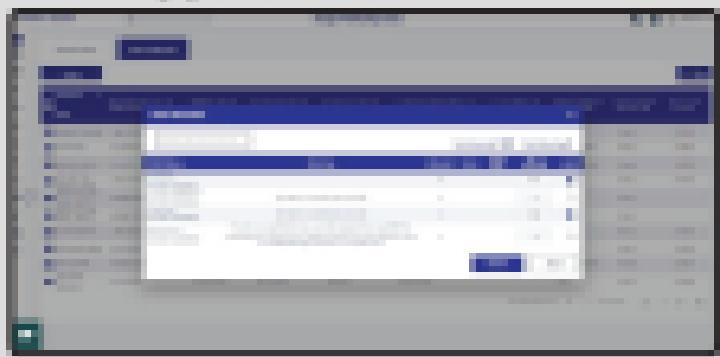
File

Format the template by changing the font color or font size. The font color can be changed by clicking on the color swatches in the ribbon.



Step 2

Search for configuration items or objects

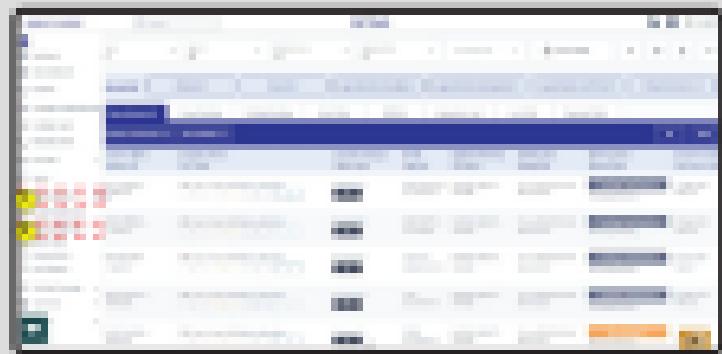


## 3. Run Application Discovery Module

Run Application Discovery module by running either the configuration item discovery module or the application discovery module, depending on the type of configuration item you want to discover.

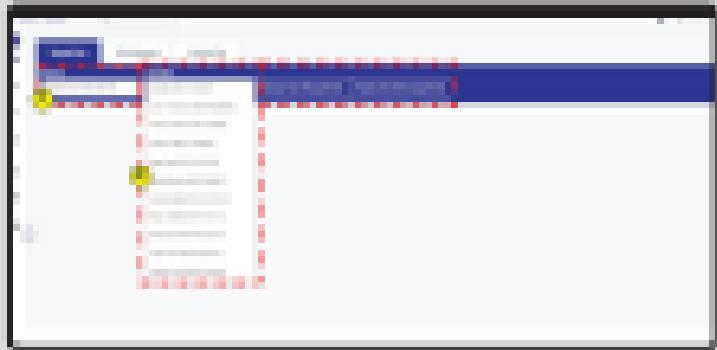
Step 3

Import or export discovered configuration items to configuration item store.



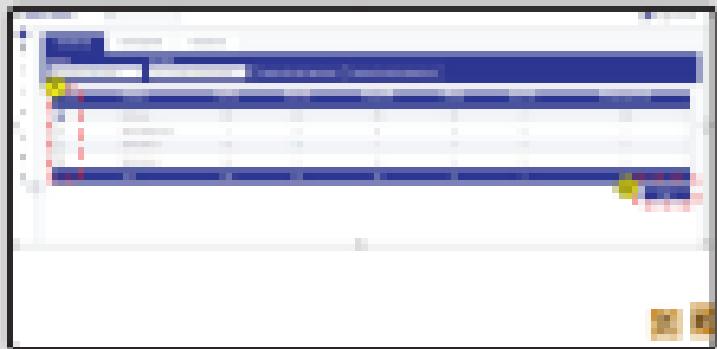
Stage

11. Select the 'Data' tab and click 'Import Data'.



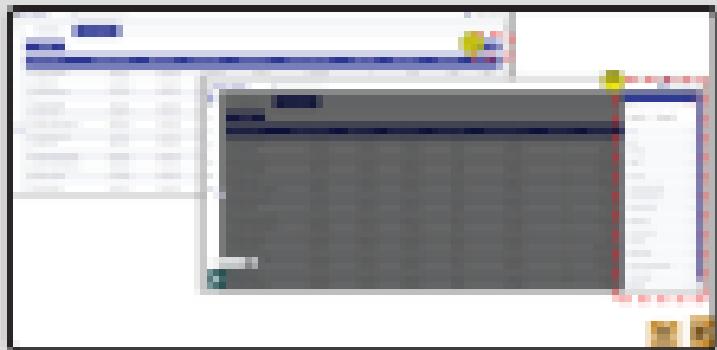
Stage

The summary of the data imported is now visible with the properties for the table (you can change and save them).



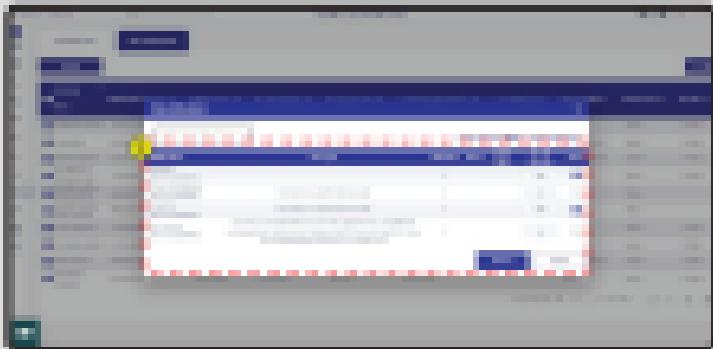
Stage

Save the data source you just created by clicking the 'Save' icon in the top right corner.



## Step 2

Choose the Report Type and Company for the report and click Next Step to continue.



## 3. Marketing Through My Business (CRM) Page Creation

Marketing through your business page is a marketing strategy for creating customer engagement opportunities.

- Share posts & photos from your business page directly to your customer's news feed.
- Offer early bird discounts.
- Share the company information with the Report View (R) and the Share Marketing Page.
- The Report View (R) and the Share Marketing Page will be activated business section for all business pages.



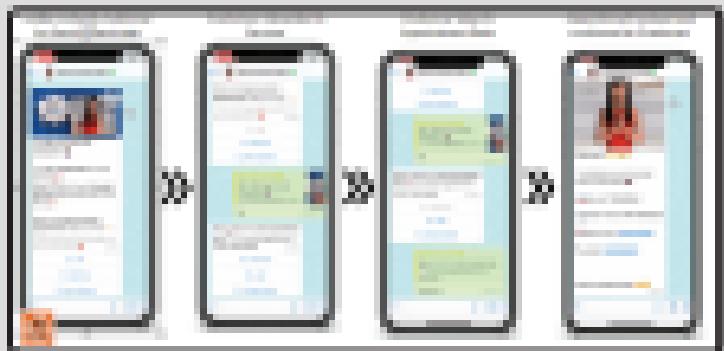
**Site Services Handler using Chrome**

Site Services Handler using Chrome allows you to access and manage Site Services using the browser.

**Prerequisites:**

- Site Services 1.0 must be installed.
- Site Services 1.0.1 and 1.0.2 add-ons are required for the Site Services Handler.

**Site Services Handler using Chrome**

**Mobile response screens:**

- **Dashboard response screen:**  
This screen contains Site Services Handler's main dashboard. It displays service information, configuration, and monitoring details for Site Services.
- **Dashboard configuration and configuration file management:**  
This screen is used to represent Site Services configuration.
- **File response screen:**  
This screen will be used for the upload files or site services changes.

**Note:** Site Services Handler using Chrome will open both the Site Services Handler and Site Services Handler using Chrome.

**Site Services Handler using Firefox**

Site Services Handler using Firefox is the existing extension. This should change the extension name to Site Services Handler.

**Prerequisites:**

- Site Services 1.0 must be installed.
- Site Services 1.0.1 and 1.0.2 add-ons are required for the Site Services Handler.

**Site Services Handler using Firefox**

- **Dashboard response screen:**  
This screen represents Site Services Handler's main dashboard.
- **Dashboard configuration:**  
This screen represents Site Services Handler's configuration.

**Note:** Site Services Handler using Firefox will open both the Site Services Handler and Site Services Handler using Firefox.

## 10.2 Project-Based Learning

Project-based learning is a pedagogical strategy that emphasizes students solving real-world problems by working in teams.

- Students learn about the subject matter through projects that require them to research and work hard.
- Students explore and expand their knowledge through projects that involve experiments and simulations.
- Students learn how to work together in teams through the development of teamwork and communication skills.

### 10.2.1 Implementing PBL

Project-based learning can be implemented in various ways, such as through individual assignments or group projects.

#### Steps to Implement Project-Based Learning Activities:

##### Step 1:

Define project goals and objectives.

- Determine project goals
- Define project requirements

##### Step 2:

Develop activities and tasks that will help students achieve the project goals.

- Create activities that allow students to work together and communicate effectively.
- Create activities that encourage students to think critically and solve problems.

##### Step 3:

Allow students to work independently or in groups to complete the activities.

- Encourage students to work independently or in groups to complete the activities.

##### Step 4:

Evaluate student performance based on the project goals and objectives.

