Prepared by: Vikki Gonzales
Approved by:
Department: 411 Winback Division
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Winback CRM Notation Guide
(How to Notate in CRM) 2019

I. Purpose and Objective

A. A guide to Properly notate relevant information in every successful or unsuccessful contact made in a Winback customer's account.

II. Definition

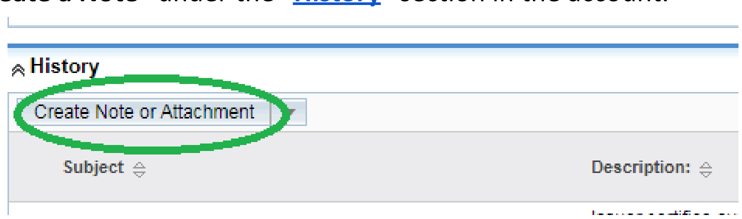
A. **Sugar CRM** - stands for Customer Relationship Management. At its simplest, a CRM system allows businesses to manage business relationships and the data and information associated with them. It stores customer and prospect contact information, accounts, leads and sales opportunities in one central location, ideally in the cloud so the information is accessible by many, in real-time.

B. **History Notes Section** - this is a section in CRM where Leaders and Agents will notate every interaction done in the customer's account.

III. How to Notate in CRM

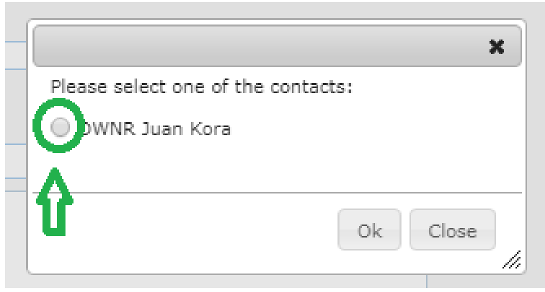
A. When notating in the customer account:

1. Go to "**Create a Note**" under the "History" section in the account.

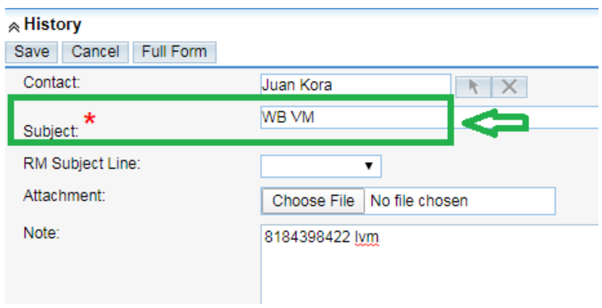


   a. If it is **multiple accounts**, create notes on all accounts that were discussed on the call.

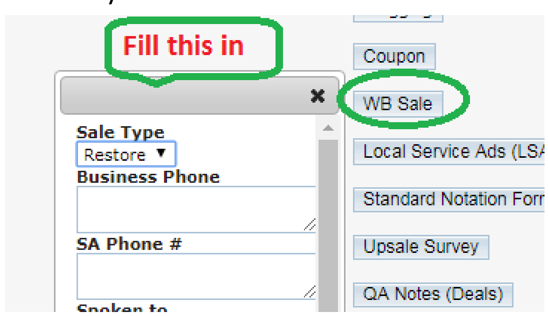
2. In the field "Contact" choose the contact of the account that you spoke with.



3. In the [**Subject**]() field, choose the correct [disposition]() for the call that took place. Below are the subject lines that needs to be followed:
    a. WB VM
    b. WB Xfer
    c. WB Attempt
    d. WB Collected
    e. WB Upsell



4. For Sold accounts, click WB Sale. A pop up will require the rep to provide the necessary information about the business.



5. In the event that there is a [**Trouble Ticket (TT)**]() submitted to any of the Winback accounts. In addition to the call notes, include in the Subject Field the Trouble Ticket (TT) number and Resolution, Trouble Ticket Status.
(example: TT9492/Save, TT56123/Restored, TT12345/Closed/Escalations)
6. **Cancel Request** - if a client requested to have the account cancelled
    a. Subject: **S2R**
    b. Description: Customer requested to cancel account
    c. **Create a Ticket** and assign it to the **retention department** with the details as to why the client requested to disconnect the service.

IV. **Recommendation**

A. Winback Templates and Subject should be set in Sugar CRM
B. Will schedule Winback training.
C. Will print out Sign Off Sheet.
D. Compliance and Control measures to be with Winback Manager.