

Exceptional customer service

Luka Klemenc, Informa Studio

**It's never too early to start
organizing customer
relationships**

Lesson 1:

**IT'S NEVER TOO EARLY TO START
THINKING ABOUT CUSTOMER
RELATIONSHIPS**

Lesson 2:

**HAVING
GOOD INTENTIONS IS NOT
ENOUGH**

3 basic principles

- Perfect product
- Caring staff
- Fast problem resolution

Lesson 3:

**DON'T THINK ABOUT ACTIONS,
THINK ABOUT REASONS AND
PURPOSE**

Customer relationship managment

- Task based
- Problem based

Basic CRM system elements

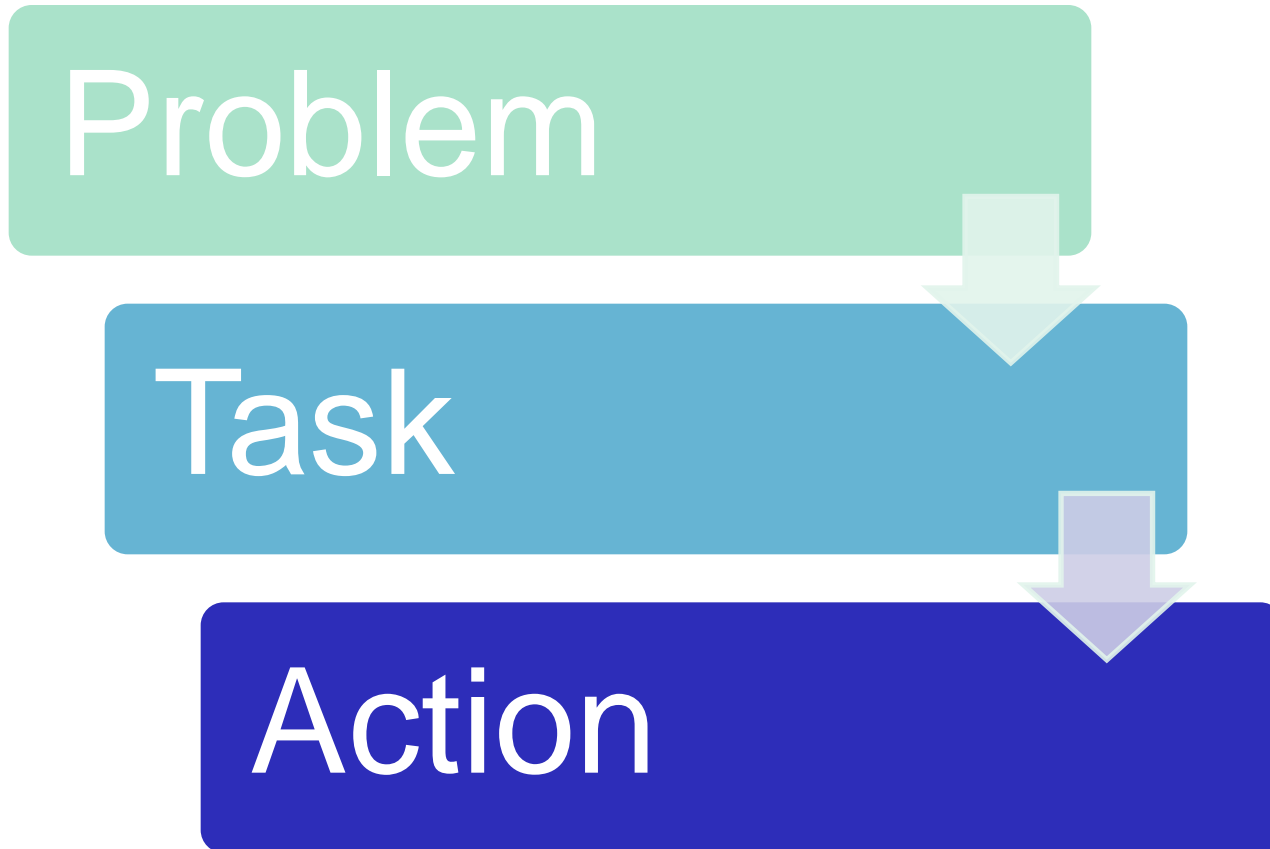
Scheduling

Customers

Comments

Stages

Task based



Task based

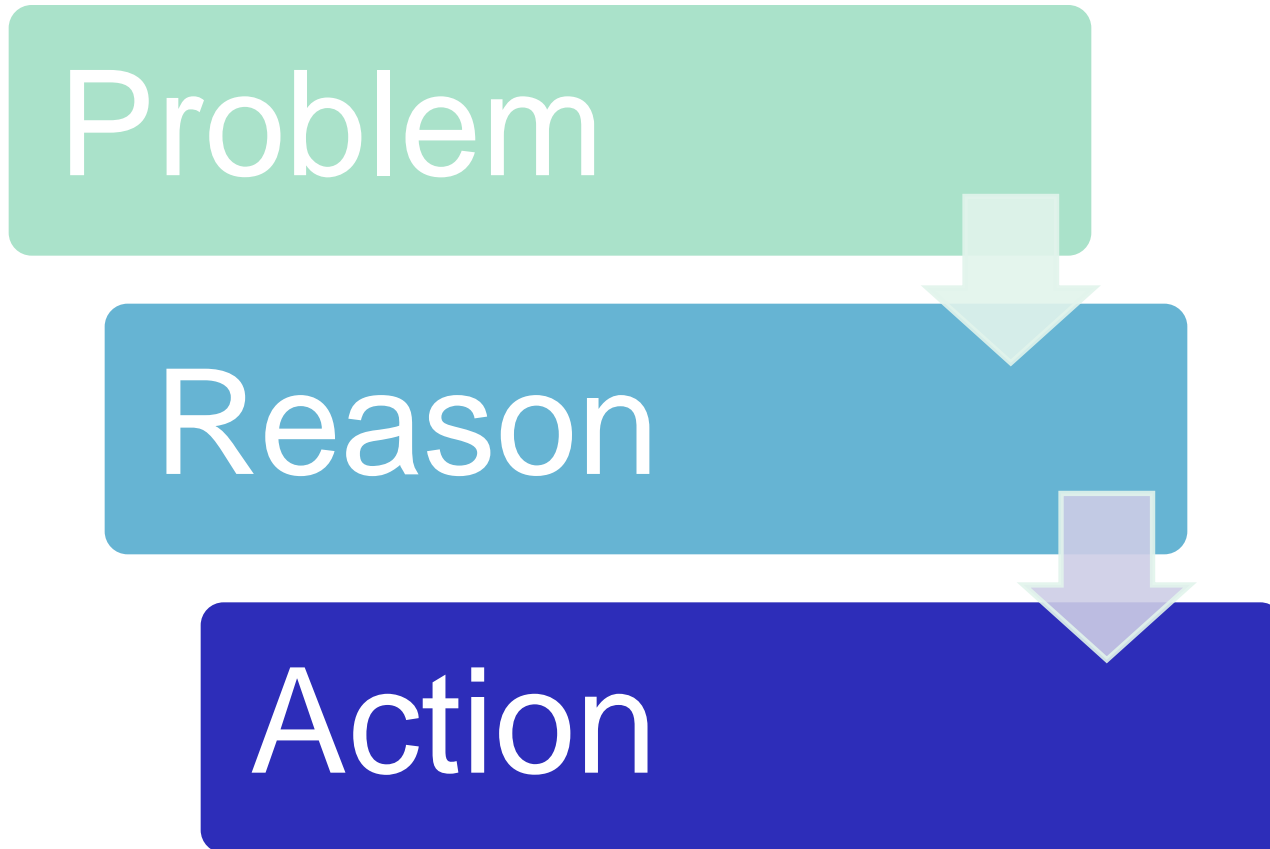
Manual

- Scheduling
- Problem tracking
- Stages

Automatic

- Reporting

Problem based



Problem based

Manual

- Problem tracking

Automatic

- Scheduling
- Stages
- Reporting


Define reasons and problems

The screenshot displays the 'SETTINGS' page of the CALL CRM application. The top navigation bar includes 'DASHBOARD', 'QUEUES', 'CONTACTS', 'SETTINGS' (highlighted), and 'ANALYSIS'. Below this, a sub-navigation bar shows 'FIELDS', 'STAGES', 'REASONS', and 'USERS'. The main content area is divided into four panels, each with an 'Add New' button:

- Fields:** Described as 'Filters that you can filter your contact by.' It contains three input fields: 'Category', 'Boniteta', and 'Owner'. A 'View All' button is at the bottom.
- Stages:** Described as 'Stages of the funnel.' It contains four input fields: 'Added', 'Contacted', 'Won', and 'Lost'. A 'View All' button is at the bottom.
- Reasons:** Described as 'Reasons for moving to next step in the sales funnel.' It contains a list of reasons: 'Wants a quote', 'Call later', 'Send email', 'Wants a presentation', 'Wants to speak to the manager', 'Wants another meeting', 'Wants a quote', 'Call later', 'Send email', 'Wants a presentation', 'Wants to speak to the manager', and 'Wants another meeting'.
- Users:** Described as 'Salespeople and managers.' It contains a list of users: 'Marko Skače', 'Milan Malan', 'John Rambo', 'Stane Nič', and 'No Body'. A 'View All' button is at the bottom.

The top of the page shows the user is logged in as 'Maja Velkavrh Koprivec' with 5 missed calls and 15 unread emails. A search bar is also present in the top right corner.

Operator interface



Logged in as:
Maja Velkavrh Koprivec

5 missed calls
15 unread emails

Logout

Enter name, phone or email... Search!

DASHBOARD

QUEUES

CONTACTS

SETTINGS

ANALYSIS

QUEUE

170 in queues
5 missed calls
20 received emails

CURRENT

Milan Zver, Avtoprevoznistvo trgovina in storitve z vilicatlji s.p.

NEXT IN QUEUE

Matej Zupanc, Slikopleskarstvo s.p.

Avtodeli jarc d.o.o.

Ivan Kolarec s.p.

Keramika Stik d.o.o.

Mercator d.d.

Avtodeli jarc d.o.o.

Ivan Kolarec s.p.

Keramika Stik d.o.o.

Mercator d.d.

MILAN ZVER, AVTOPREVOZNIŠTVO, TRGOVINA IN STORITVE S.P.

Enter text...

☐ Wrong phone number

☐ Call later

☐ Doesn't answer

☐ Send email presentation

☐ Send email reminder

☐ Send email quote

☐ Wrong email

☐ Not fit for sale

☐ Received documents

Submit

15 EVENTS (since 22.1.2012)

Amanda Kepic | 22.3.2013 14.55

Outgoing call

A wonderful serenity has taken possession of my entire soul, like these sweet mornings of spring which I enjoy with my whole heart. I am alone, and feel the charm of existence in this spot, which was created for the bliss of souls like mine.

Call later

Doesn't answer

Not interested

Scheduled a call 13.1.2013 12.00

Amanda Kepic | 22.3.2013 14.55

Outgoing call

Current status:
CONTACTED

Contact name:
Milan Zver

Phone number:
+38631123456 Call

Phone number:
+38631123456 Call

Email address:
milan.zver@brlog.com Email

Phone number:
+38631123456 Call

Email address:
milan.zver@brlog.com Email

Edit

Operator interface

viličarji s.p.

NEXT IN QUEUE

Matej Zupanc, Slikopleskarstvo s.p.

Avtodeli jarc d.o.o.

Ivan Kolarec s.p.

Keramika Stik d.o.o.

Mercator d.d.

Avtodeli jarc d.o.o.

Ivan Kolarec s.p.

Keramika Stik d.o.o.

Mercator d.d.

[VIEW MORE](#)

- | | | |
|---|---|---|
| <input type="checkbox"/> Wrong phone number | <input checked="" type="checkbox"/> Send email presentation | <input type="checkbox"/> Wrong email |
| <input type="checkbox"/> Call later | <input type="checkbox"/> Send email reminder | <input type="checkbox"/> Not fit for sale |
| <input type="checkbox"/> Doesn't answer | <input type="checkbox"/> Send email quote | <input type="checkbox"/> Received documents |

SEND EMAIL

From	<input type="text" value="maja.lunder@primerjam.si"/>
To	<input type="text" value="Email"/>
Template	<input type="text" value="Presentation"/> ▼
Subject	<input type="text" value="Subject"/>
Message	<div><div>Enter text</div><div></div></div>
<input type="button" value="Submit"/>	

Phone number:
+38631123456

Phone number:
+38631123456

Email address:
milan.zver@brlog.com

Phone number:
+38631123456

Email address:
milan.zver@brlog.com

15 EVENTS (since 22.1.2012)

Amanda Kepic | 22.3.2013 14.55

Outgoing call


A wonderful serenity has taken possession of my entire soul, like these sweet mornings of spring which I enjoy with my whole heart. I am alone, and feel the charm of existence in this spot, which was created for the bliss of souls like mine.


We don't focus on tasks and actions anymore. We focus on reasons and purpose.


Problem solving

1. Apologize to the customer
2. Go through the complaint.
3. Solve the problem.
4. Follow up. Document the problem and find a systematical solution for it.

Define reasons



 Logged in as:
Maja Velkavrh Koprivec

 5 missed calls
15 unread emails

Logout

Enter name, phone or email... Search!

DASHBOARD

QUEUES

CONTACTS

SETTINGS

ANALYSIS

FIELDS

STAGES

REASONS

USERS

SETTINGS - REASONS

MY REASONS

Send Email (Quote)

Send Email (Quote)

Send Email (Quote)

Send Email (Quote)

Send Email (Quote)

Send Email (Quote)

Add reason

Reason name

User wants a quote

What happened?

Previous stage

1

2

3

4

Where contact was before something happened?

Action

Send email

User wants a quote

Upload

What do you need to do?

Lesson 4:

**PERSONALIZED SERVICE IS
EASIER THAN YOU THINK**

Basic personalization principles

- Every customer gets the same support person whenever possible.
- We use real names and photos.
- All emails are personalized.
- We gather personal info about clients that they want to share with us.

Segmentation and personalization

CONTACTS - MASS EDIT

SEARCH INSIDE QUEUE

Phone

E-mail

Company name

Stage

Added
Contacted
Quote
Won

Group

Vulkanizerji
Avtomehaniki
Avtoprevozniki
Mizarji

Search

18 / 100 selected

Select all

Select none

Edit selected

Queue

Other actions

Schedule call

18 Contacts

INITIAL SOURCE: Website contact form

STAGE: Contacted

OWNER: Maja Lunder

☐ Wrong phone number

☐ Call later

☐ Doesn't answer

☒ Send email presentation

☐ Send email reminder

☐ Send email quote

☐ Wrong email

☐ Not fit for sale

☐ Received documents

SEND EMAIL

From maja.lunder@primerjam.si

To Email

Template Presentation

Subject Subject

Message Enter text

Lesson 5:

ANTICIPATION IS BETTER THAN PROBLEM SOLVING

Lesson 6:

KEEP IT SIMPLE