8thManage®

CRM

Service Management

Standardized Services:
A customer is set up as an external log-on user to communicate with the service representative directly.

VIP Personalized Services:
Planning, coordinating and delivering special VIP services for specially important clients to their highest satisfaction level.

Satisfied customers are your biggest asset. They provide the basis for new business, repeated business, renewed business and future business. They are also the best source for references. It bodes well to pay special attention to your customers, to make sure they are well cared for and satisfied. 8thManage provides the information management tools and best practice methodology for you to deliver the world-class customer service that they deserve.

Delivering Good Customer Service

8thManage provides 2 types of Service Support categories, namely Standardized Service Support and Personalized Service Support.

Standardized Service Support

In 8thManage's Standardized Service Support, a customer is set up as an external log-on user . He or she can log-on and do the following:

 • View a list of service requests (call service tickets in 8thManage) that the user submitted in the past. The user can click on links in the list to view responses for individual requests

 • Create and submit new service requests. The new service request will be tracked automatically by the "Automatic Alert and Escalation" process, in accordance with pre-configured escalation rules, until the service request is fully met. Concurrent with this, the service request will appear instantly on the designated service representative's "Service Ticket" list as a "new" item; and the service representative will receive an email alert warning him of the arrival of the request

 • In the event the user is not satisfied with the service, he or she has the option from inside the service ticket page to manually initiate an escalation by clicking the "Escalate this Ticket to Superior" button and an email alert will be sent to the service representative's manager with a cc email to the service representative

Service Information & Knowledge :
- Client Profile Information
- Client Operations, Interaction and Action Information
- Online Product & Service Catalogue
- Online Knowledge Base

Personalized Service Support

8thManage provides a Personalized Service Support facility for planning, coordinating and delivering premium services to your VIP clients. A Personalized Service Request is usually generated by one of your relationship managers assigned to the VIP Clients. After communicating with the client, the relationship manager will, on behalf of the client, mobilize, utilize and coordinate resources in different groups and locations, to work together and deliver the requested services to the VIP Client.

The Service Representative is well Supported

Comprehensive and easily accessible information is critical in delivering good customer service. 8thManage operates in a real-time and online on a web-based platform - which means the information served is always up-to-the-minute. There are different databases available to support the customer in different ways.

Client Profile Information

8thManage systematically records and updates client profile information such as the client organization chart, contact staff information, information about account team members, and purchase and warranty records, for example. When the customer calls for service, the service representative immediately can access and understand the context for serving the customer.
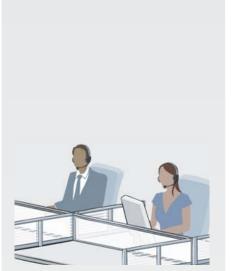
Client Operations, Interaction and Action Information

Client Business Operation information including outstanding opportunities, quotations, orders, shipment, invoicing and payment information will enable service representatives to understand current and pending subject matters relating to business transaction at hand. 8thManage's Client Interaction Historical Records and "Action Lists" allow service representatives view at-a-glance, for a specific client "planned actions" by the account team and "extended account teams" as appropriate, and what they have done and are about to do, across the enterprise, for this specific client.

Online Product and Service Catalogue

8thManage keeps in one central database the official source of product and service information, including "availability status" information, description, pricing, inventory and terms and condition of purchase.

Other information associated with "Product & Services" includes:
- Promotion packages available
- Up-selling/cross-selling information
- In the event an item is not available, what is available as a substitute is suggested
- Competitive information
- Distributors and resellers locations

Online Knowledge Base

8thManage provides for the establishment and easy maintenance of a centrally accessible Knowledge Base, which may contain information of interest to the company's intended audiences, especially customers, employees, consultants, suppliers, partners and agents. Popular topics include FAQ's, whitepapers, product descriptions, application documents, user guides and manuals.

Service representatives have access to the online, searchable Knowledge Base, and can use it to locate and retrieve information which he or she may need to respond to a service call. A directory of subject matter experts can be set up to identify resources that can respond to service questions in the event relevant information is not available in the Knowledge Base.

Real-time Service Performance Reporting

Service Ticket Reports

8thManage provides for the tracking of how well your service representatives serve your clients. The following reports are available on demand:
- Service Ticket Report by Client
- Service Ticket Report by Responsible Person
- Service Ticket Escalation Report

Additionally, One-Time or Multiple-Time service quality e-Survey can be implemented with automatic survey report generation within 8thManage. These measures can be very effective in ensuring customer satisfaction and for uncovering issues that may otherwise be missed.

Automatic Alert and Escalation

In the event a service ticket is established and the request is not closed to the satisfaction of the client within x days (and x is set globally by policy), an email alert will be sent to the responsible service representative. In the event the same service request is not satisfactorily closed within another y days, email alerts will automatically be sent by 8thManage to the responsible service representative and his or her manager.

Service Quality & Client Satisfaction Management:
- Service Performance Reports
- Client Escalation Management
- Client Satisfaction Checks

Running a Service Operation:
- Service Cost Budgeting
  & Expense Tracking
- Service Profit & Loss Budgeting
  & Tracking

Billable Service Support

8thManage offers full service support to set up a billable service business.

Service Cost Management

- Service cost budgeting and expense tracking
- Service contract/order management
- Supplier invoice and payment tracking
- Service representative expense request and report management
- Service penalty tracking

Service Return Management

- Service charging and invoicing
- Service payment tracking
- Service profit and loss tracking

Summing-up

8thManage offers a rich mix of service options that you can mix and match, and to adapt in setting up a service support business that your customers deserve. Standard service is efficient and cost effective, while the personalized service will give the extra personal attention that VIP customers will expect to receive.