CUSTOMER RELATIONSHIP MANAGEMENT: User Manual

SHUTTLE ENTERPRISE SERVER

Introduction

Customer Relationship Management, or CRM, as it is commonly called, is all about managing the Information and Events required for maintaining and promoting the best possible relations with the Customers of your Business.

Purpose of the Manual

The purpose of this User Manual is to introduce you to the use of CRM with SHUTTLE.

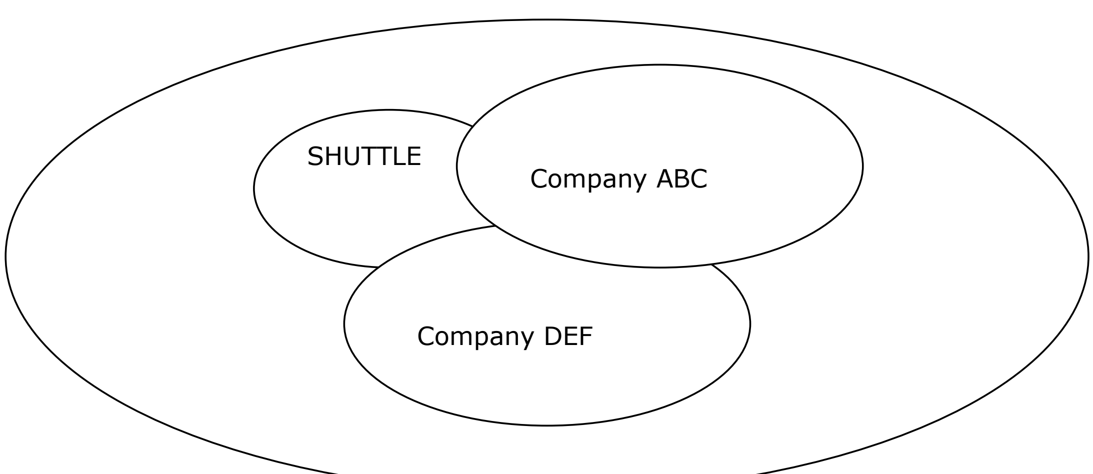
What is it? CRM

What is it? CRM, as it is commonly referred to, is a function set for Managing Information and Events relating to Customers of the Enterprise. Each Company may add additional Items that they identify as essential in Customer Relationship Management, but certainly a CRM system will usually address the following primary issues, among others :-

1) Gathering of Information relating to transactions with the Customer
2) Storing details of Customer Contact
3) Managing pending and outstanding events, e.g. Support, Goods Delivery, Meetings, etc.

CRM in SHUTTLE is designed to cater for a broad range of requirements, and is offered in a flexible format that allows the Service Provider to customize and / or add additional functionality to satisfy unique needs that may be different from one Company to the next. SHUTTLE CRM is also able to interface to Legacy Systems that are not part of SHUTTLE.

In SHUTTLE, you have a separate and independent CRM set in each Datamart. This is necessary because you may have different Customer Sets in different DataMarts, i.e. hosting Applications for different Companies with different Customer Sets on the same Server. We can represent this visually as follows.



In the visual representation above, each of SHUTTLE, Company ABC and Company DEF have it's own distinct set of CRM Data, even if it is not in use. Therefore, it is also possible to enhance the CRM for Company ABC in a different way to that of Company DEF, without the one affecting the other.

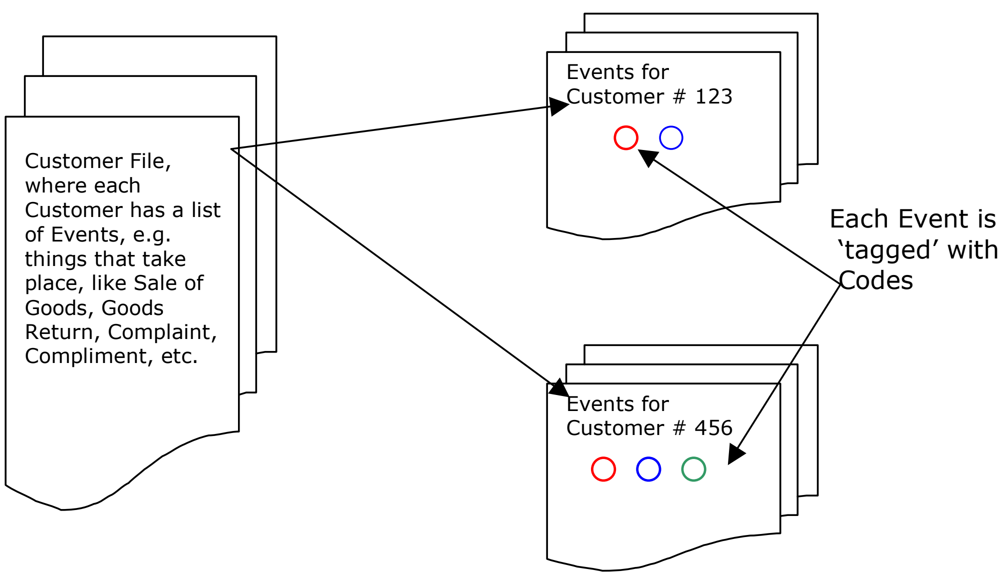
CRM options are integrated to the Application Environment, and can be reached from all Screens, from the Menu, and from the CRM Wizard.

CRM Wizard includes all the primary entry points for CRM

Before we look at the CRM Wizard, let's consider for a moment that we need ways to analyse and control our CRM Information. For this purpose, CRM in SHUTTLE uses Event (Action) Codes, Contact Codes and Analysis Codes.

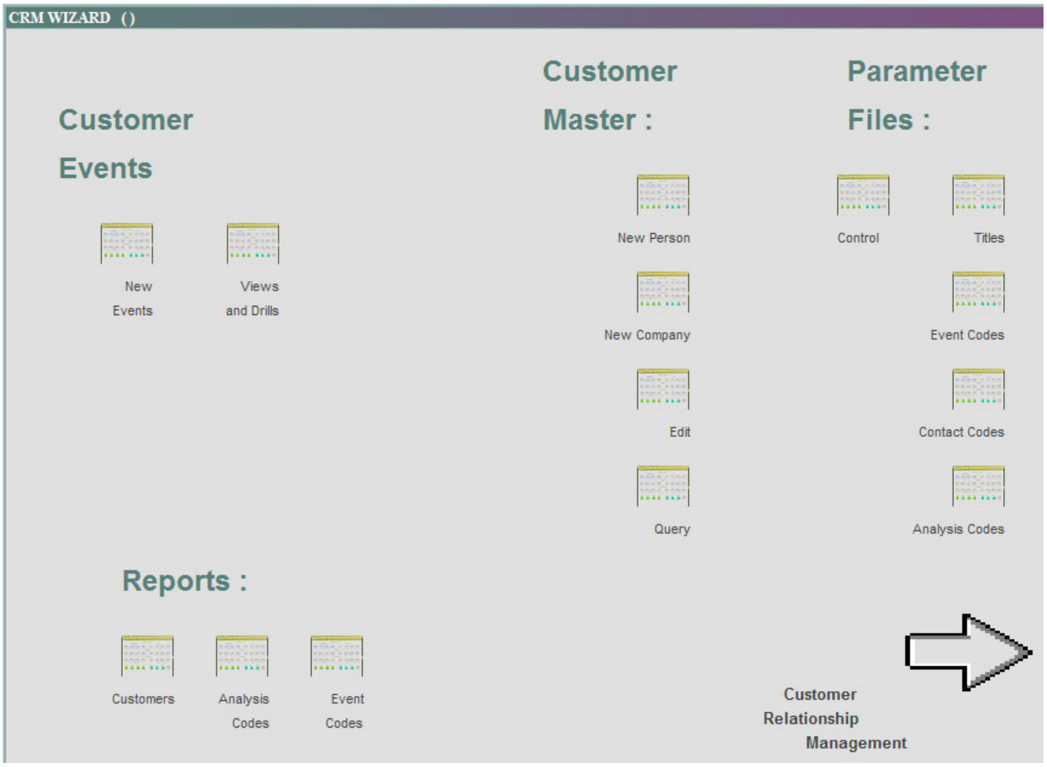
Every Event is classified with an Event Code, which always has an embedded Contact Code. Analysis Codes, on the other hand, are optional, and may be used with Events when necessary. So what are these?

1st of all, they will be different from one Company to the next, because they will be influenced directly by what kind of Business you are, but here is an example. A Services Company that does Electrical work may have Event Codes like Repair Call Out and Return Call Out, while a Retailer may have Event Codes like Direct Sale, Internet Sale, Goods Return, etc. The Contact Class Codes may be used on multiple Event Codes, and relate directly to the measure of Customer Interaction, e.g. Face-to-Face, E-Mail, Phone Call, etc. By having such Codes attached to all Customer Events, it becomes feasible to perform en masse Analysis Statistics on your Customer Relations Information Database, which is invaluable in making strategic Decisions with regards to Marketing, your Business in general, and so on. The Analysis Codes are additional and optional, and used on demand. For instance, you may have a specific Advertising Campaign, which is given an Analysis Code, and all Business that flow from this Campaign is 'marked' with this Code. Next time you have a similar Campaign, you use a different Analysis Code, and then it is easy to compare the results of the 2 Campaigns with each other.



The 'Codes' are usually defined by the CRM Administrator, not by Users. Users simply select the applicable Codes when capturing Events.

The CRM Wizard looks like this –



The 4 main Categories of options are –

Customer Events
Customer Master
Parameter Files
Reports

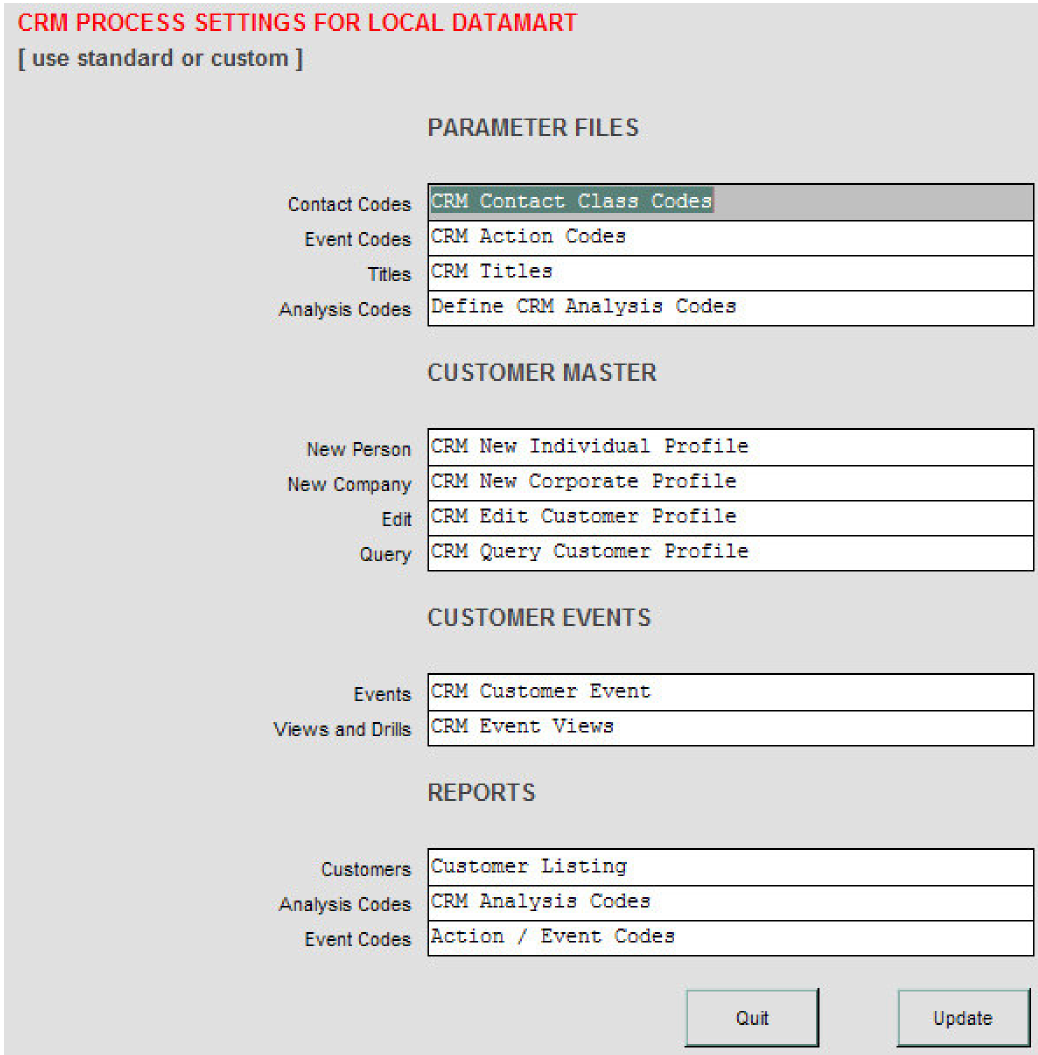
We will start by looking at the Parameter Options 1st.

PARAMETER FILES

Control

The Control Screen is not used by Users of the system, only by Developers. The Control Screen allows Developers to replace standard entry points to CRM with custom entry points, i.e. the Processes called by the CRM Wizard. Any of the options on the main CRM Wizard may be replaced by a customized Menu Process, which may be similar but extended, or may be an entirely different process. This arrangement is in place for the following reasons:

1) It enables customization of CRM to fit local requirements, i.e. additional functionality that still interfaces perfectly with SHUTTLE.
2) It enables the option to cater for different CRM functionality in different DataMarts on the same Server.
3) It preserves compatibility with future SHUTTLE upgrades.

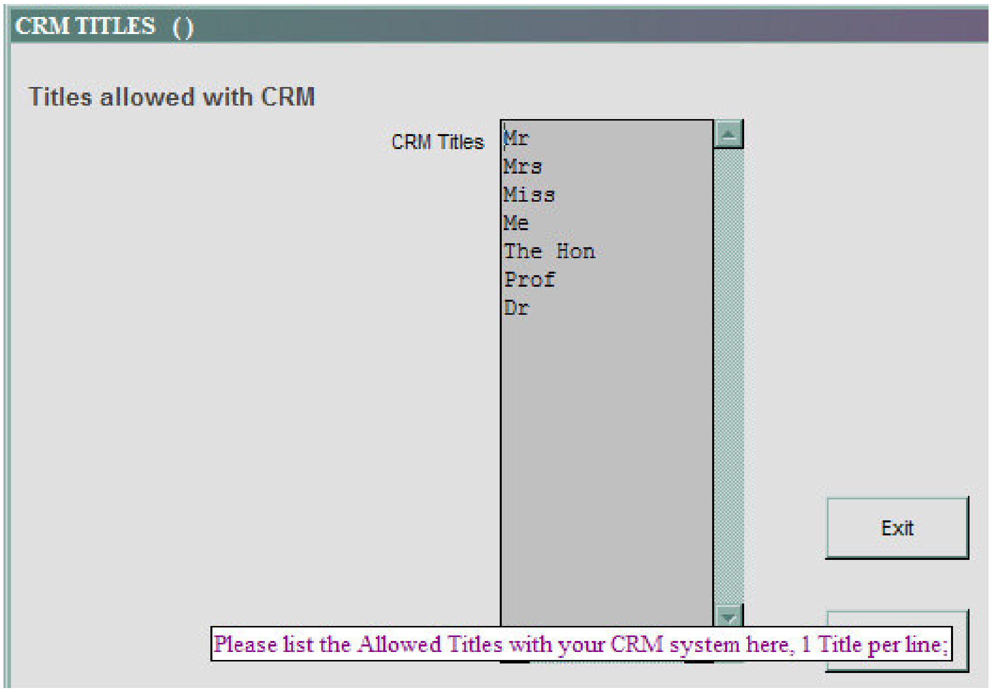


Note that the layout of the Control Screen follows the same Headings found on the CRM Wizard, so it is easy to recognize which entry points (if any), you wish to adapt by using a different Menu Process.

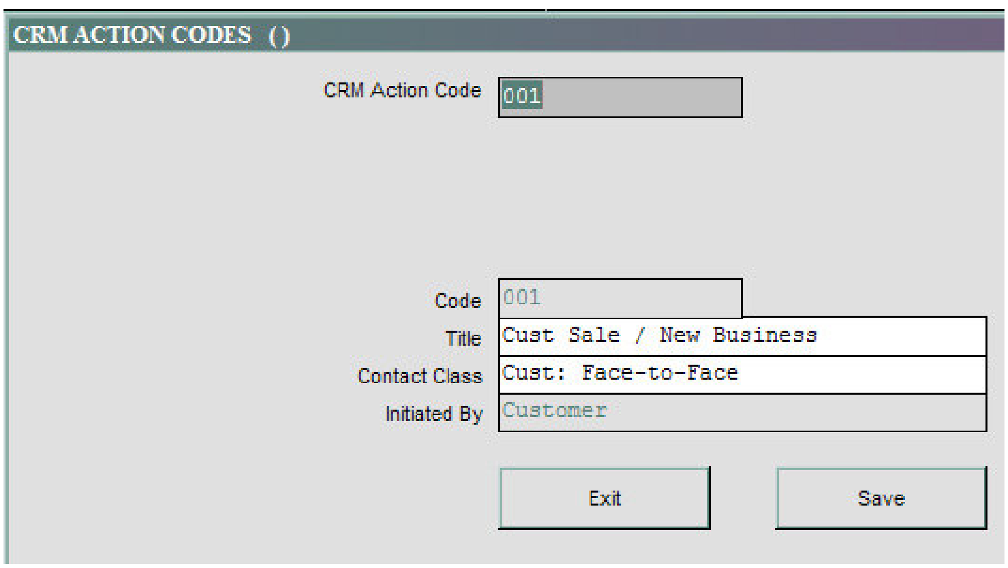
Hint: If you adapt a standard SHUTTLE Process, your version of the process will be overwritten the next time you upgrade SHUTTLE. That is why it is better to use the Developer to create a custom (new) Process, which you may initially copy from the standard Process, then adapt it, and record the Process Option here in the appropriate slot.

Titles

Titles are straight forward. Simply list the accepted Titles for your system. Hint: This prevents one User typing ‘Mister’ while another types ‘Mr’ yet they are both trying to do the same thing.

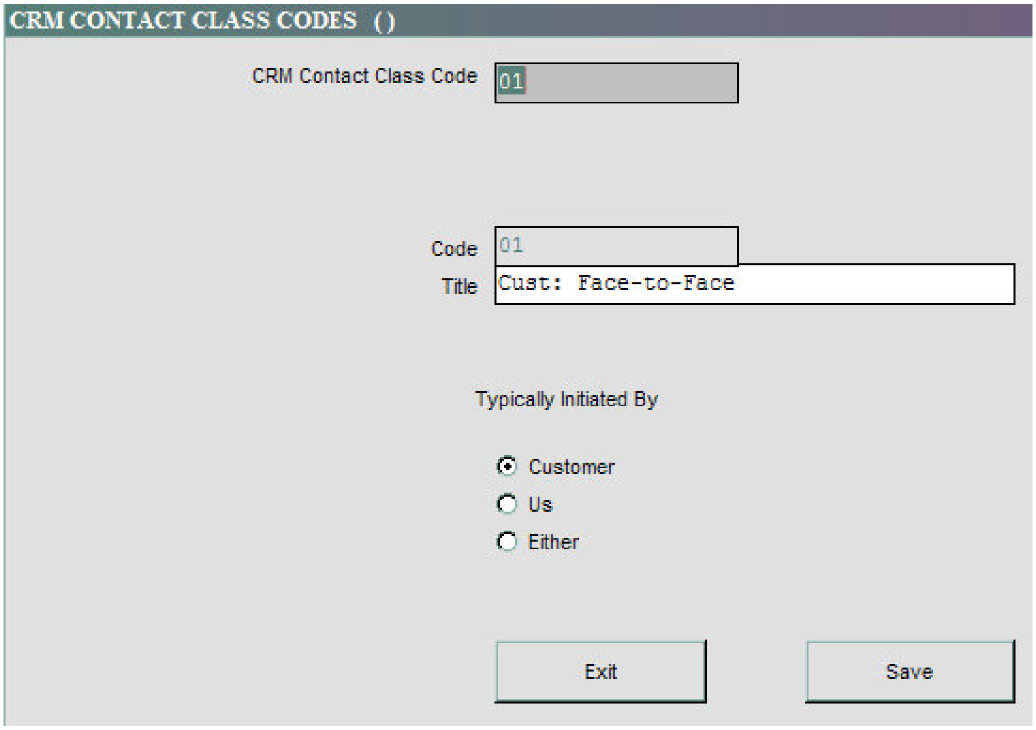


Event Codes



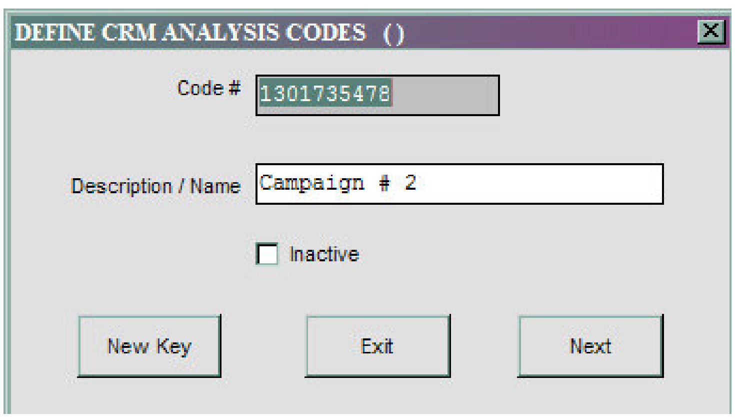
The Event Code has an embedded 'Contact Class' Code, and the same Contact Class Code will probably appear on all Event Code types where 'Face-to-Face' applies.

Contact Codes



The Contact Class Code has an indicator that signals how this Contact Type is usually initiated.

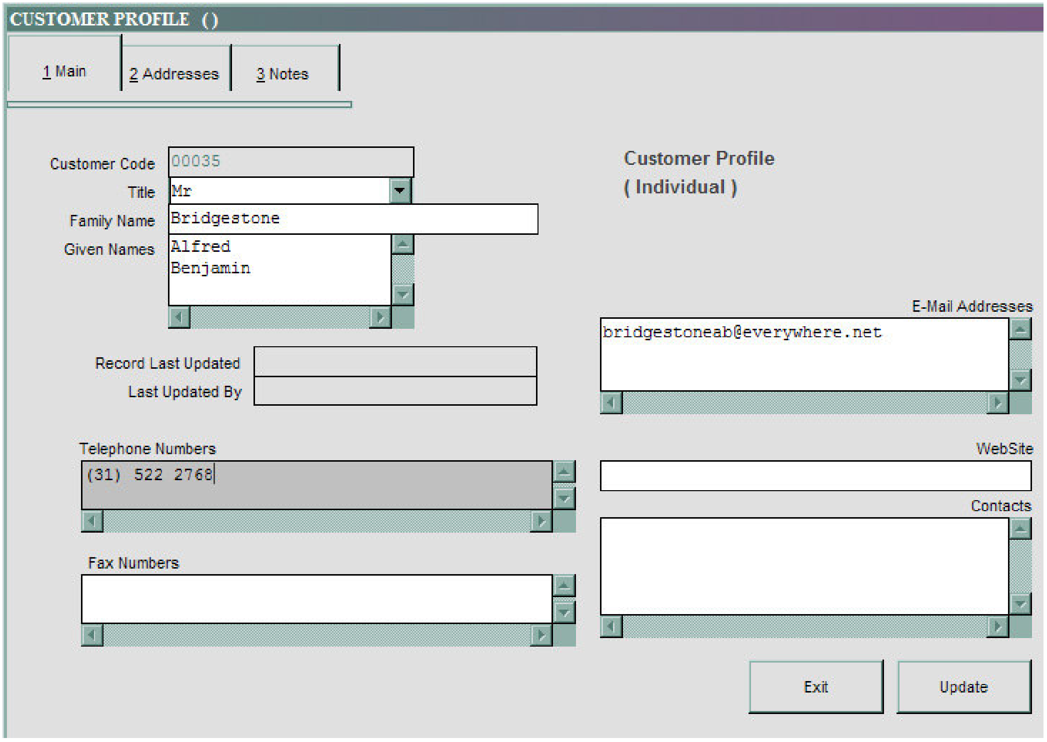
Analysis Codes



Analysis Codes may be Active or Inactive. Once a Campaign (or other Event for which an Analysis Code is used) is over, the Code is set to Inactive, and then Users may no longer select it with new Events, though the Code itself remains valid for Analysis. Some Analysis Codes may always be Active.

CUSTOMER MASTER

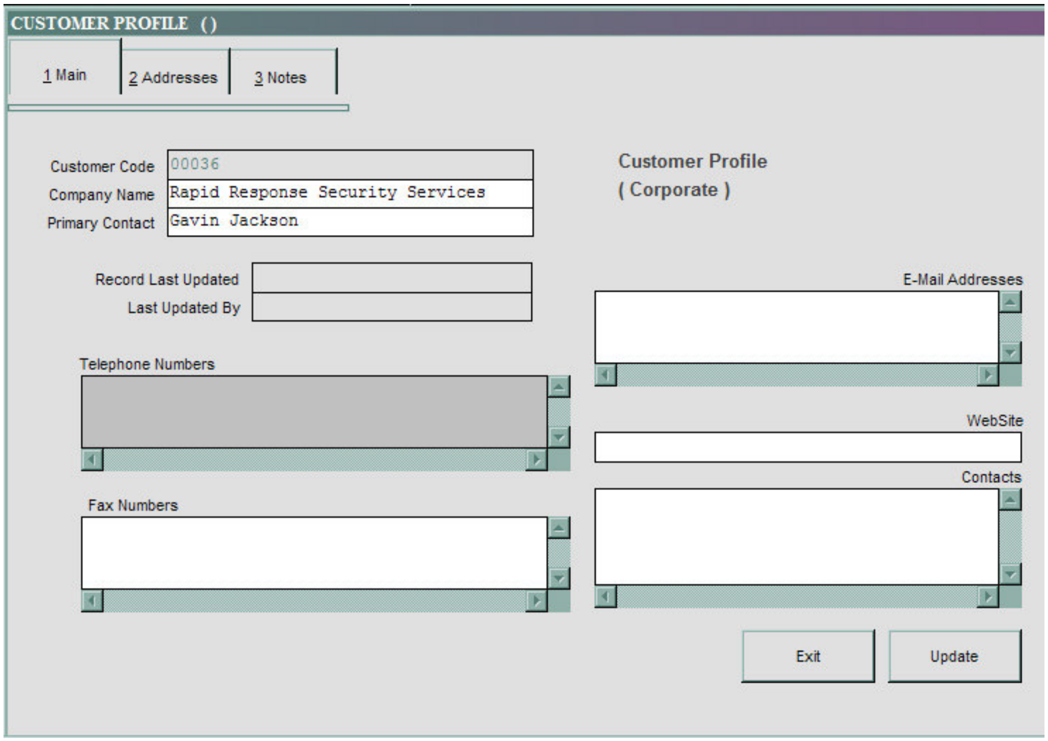
New Person



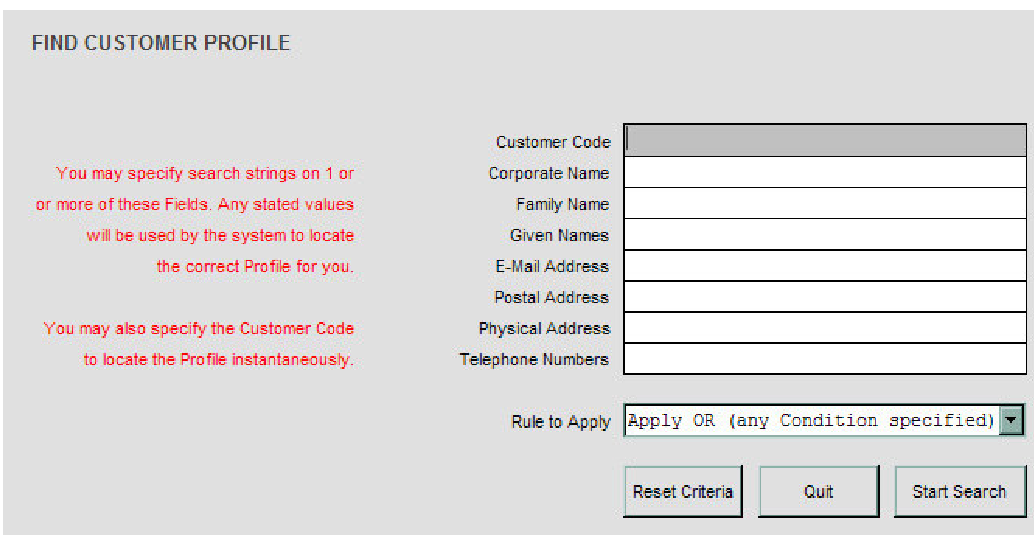
A new Customer Profile, where the Customer is a person rather than a Company or Organization, is defined with this option. By default the system caters for up to 6 Addresses. The Customer Profile Master File has a number of reserved Fields for Customization, where local Fields may be defined, and this Screen adapted as a local version, to cater for more specific or more extensive requirements.

New Company

A new Company Profile is defined with this option. By default the system caters for up to 6 Addresses. The Customer Profile Master File (the same File as for Customers who are Persons) has a number of reserved Fields for Customization, where local Fields may be defined, and this Screen adapted as a local version, to cater for more specific or more extensive requirements.



Edit



The Edit option automatically calls the standard 'Find' facility for a Customer Profile, before leading you to the Edit Screen.

Query

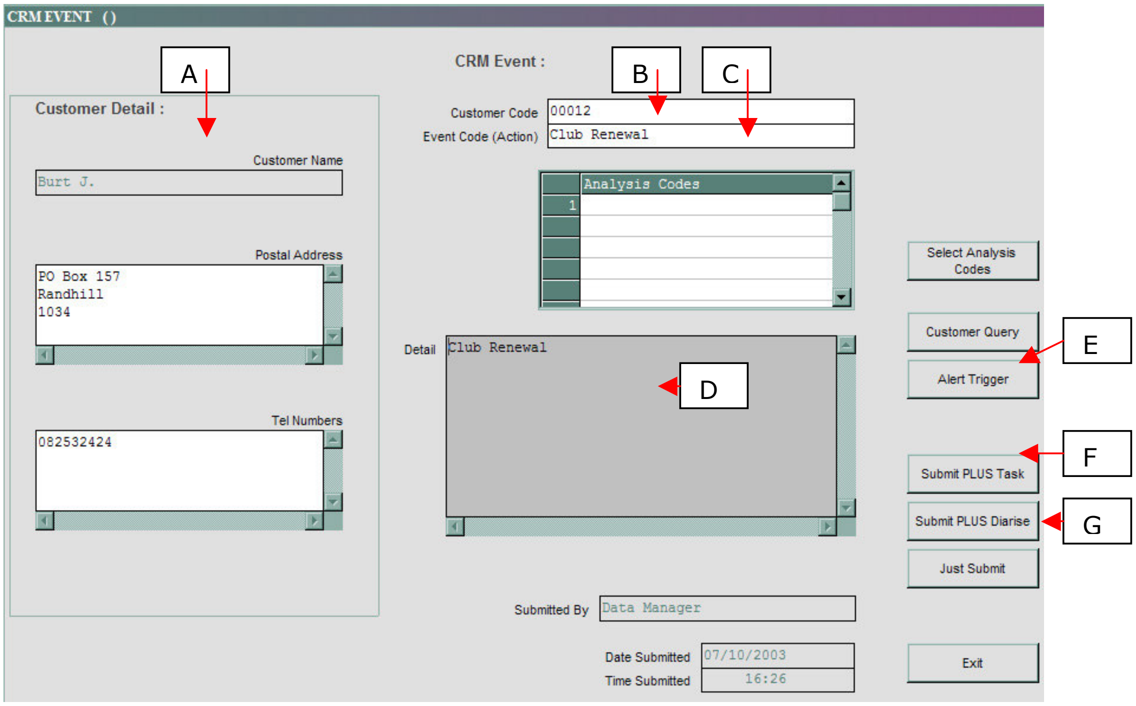
'Query' is the 'look only' version of Edit, which allows you to Query a Customer Profile but not update it. It will call the same 'Find' function as shown above.

Query (and Edit above) is also a typical example of an Option that may be localized for a format that suits the Company. In the case of QUERY, it is the logical place to provide an option to 'drill' into the Accounting system and be able to retrieve the Customer Account details and Financial Transaction views.

CUSTOMER EVENTS

New Events

Below we picture an example of a new Event being captured –



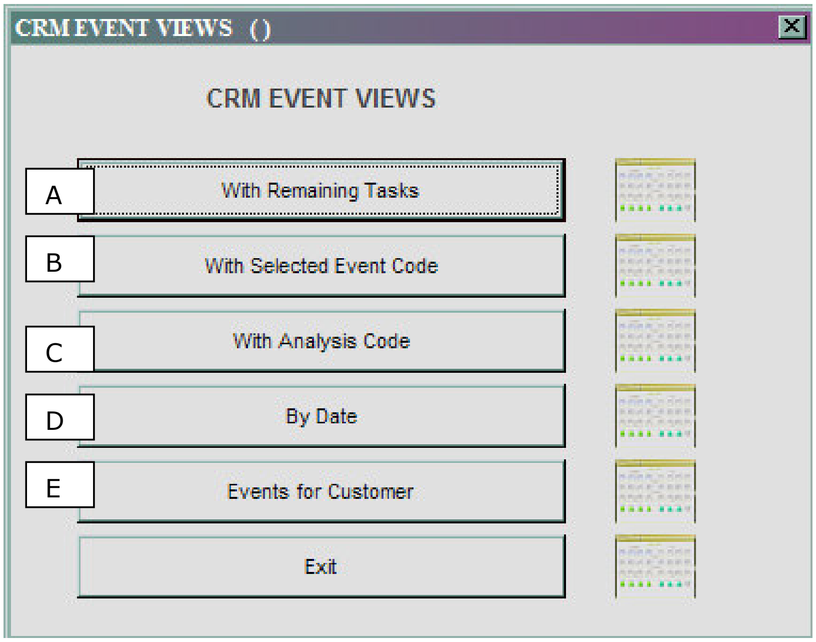
A new EVENT is one of the central, recurring actions in the CRM system. Whenever some event involves a Customer, it is recorded as a New Event.

When the Customer Code is captured (B), the system will display Customer information in Area (A), and display the current Operator Code at the bottom, together with Date and Time submitted.

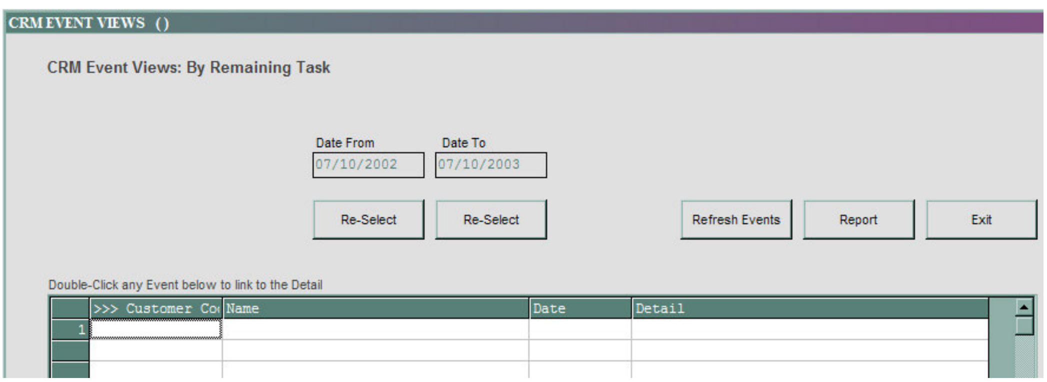
The Event Code is selected from an automatic Lookup at (C), and defaults also to the Detail Area at (D). Detail would usually be expanded on to describe any necessary information. 1 or more Analysis Codes may be selected by choosing 'Select Analysis Codes'.

Thus, an Event is captured very easily and quickly. All that remains is to choose SUBMIT, or alternatively to submit while at the same time creating a Diary Entry (G) or a follow up Task (F). When a Diary Entry or follow up Task is selected, the Event is automatically marked as open and UNRESOLVED, i.e. something remains to be done. This is a wonderful control to ensure that a Customer, or commitments or promises to Customers, are never 'forgotten' until fulfilled, since the 'Remaining Tasks' view will always highlight Events where a Task is logged, but not yet fulfilled (Signed Off), or a Diary Entry is pending.

Views and Drills



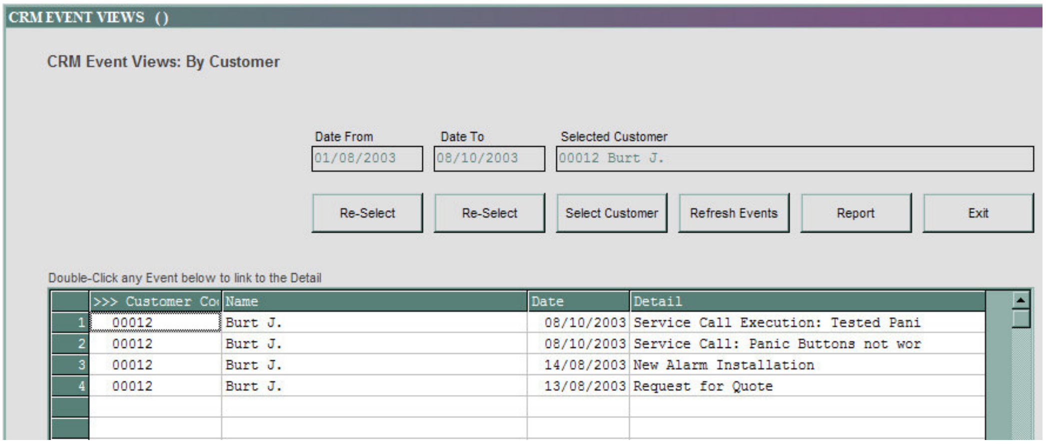
The standard CRM Event Views include Remaining Tasks, Selected Event Code, Analysis Code View, Date Range View and a View for a selected Customer. It is quite easy for a Service Provider to expand on these standard views and offer any required View of the Data that a Customer may require. Each of the standard Views allow further Criteria to be imposed on the Data Selection.



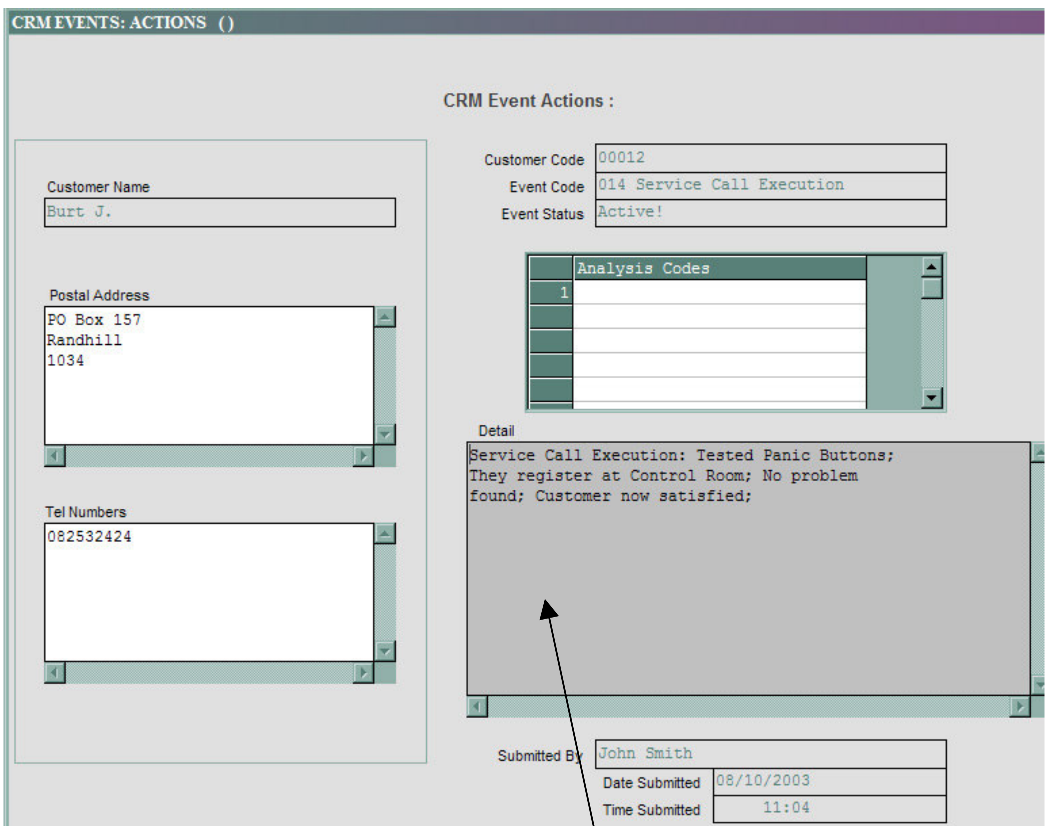
For instance, we show an entry to the Remaining Tasks View (A) above. The User may select a Date Range (from / to) to direct which Events will be selected. Once a View is loaded, you may either Drill into any of the listed Events by dbl-clicking the Row, or produce a Report of the Current List.

View (B) provides a View into a specific Event Code within a specified Date Range, and wherever it has been recorded with any Customer. View (C) allows you to home in on a Selected Analysis Code, and the related Events, while View (D) lists all Events for selected Dates.

View (E) provides a running history for a Selected Customer, at a glance.



The VIEW shown above includes Customer Events for Customer '00012' between 1st Aug and 8th Oct, the most recent events showing at the top. In this case, the running History shows where the Customer requested a Quote, then a new Alarm was Installed on 14th Aug. On 8th October, the Customer complained that the Panic Buttons were not working to satisfaction. If we dbl-click the 1st Row, we can see the Technician's report back on following this call.



The Technician reports back that no problem was found, but that the Customer is now satisfied that all is working …

REPORTS

Customers

This is a standard SHUTTLE Report which will list the Customer Master based on Selection Criteria specified by the User. The Customer Report option is a prime example of a Process that may be replaced with another, local Process, which may offer a variety of Reports based on the Customer Master File.

Analysis Codes

This Reports lists the defined Analysis Codes.

Event Codes

This Reports lists the defined Event Codes.