CRM Domestic Voice

(Job Role)

Qualification Pack: Ref. Id. SSC/Q2210

Sector: Information Technology and Information Technology enabled Services (IT-ITeS)

Textbook for Class XI

राष्ट्रीय शैक्षिक अनुसंधान और प्रशिक्षण परिषद्
NATIONAL COUNCIL OF EDUCATIONAL RESEARCH AND TRAINING

Foreword

The National Curriculum Framework–2005 (NCF–2005) recommends bringing work and education into the domain of the curricular, infusing it in all areas of learning while giving it an identity of its own at relevant stages. It explains that work transforms knowledge into experience and generates important personal and social values such as self-reliance, creativity and cooperation. Through work one learns to find one's place in the society. It is an educational activity with an inherent potential for inclusion. Therefore, an experience of involvement in productive work in an educational setting will make one appreciate the worth of social life and what is valued and appreciated in society. Work involves interaction with material or other people (mostly both), thus creating a deeper comprehension and increased practical knowledge of natural substances and social relationships.

Through work and education, school knowledge can be easily linked to learners' life outside the school. This also makes a departure from the legacy of bookish learning and bridges the gap between the school, home, community and the workplace. The NCF–2005 also emphasises on Vocational Education and Training (VET) for all those children who wish to acquire additional skills and/or seek livelihood through vocational education after either discontinuing or completing their school education. VET is expected to provide a 'preferred and dignified' choice rather than a terminal or 'last-resort' option.

As a follow-up of this, NCERT has attempted to infuse work across the subject areas and also contributed in the development of the National Skill Qualification Framework (NSQF) for the country, which was notified on 27 December 2013. It is a quality assurance framework that organises all qualifications according to levels of knowledge, skills and attitude. These levels, graded from one to ten, are defined in terms of learning outcomes, which the learner must possess regardless of whether they are obtained through formal, non-formal or informal learning. The NSQF sets common principles and guidelines for a nationally recognised qualification system covering Schools, Vocational Education and Training Institutions, Technical Education Institutions, Colleges and Universities.

It is under this backdrop that Pandit Sunderlal Sharma Central Institute of Vocational Education (PSSCIVE), Bhopal, a constituent of NCERT has developed learning outcomes based modular curricula for the vocational subjects from Classes IX to XII. This has been developed under the

Centrally Sponsored Scheme of Vocationalisation of Secondary and Higher Secondary Education of the Ministry of Human Resource Development.

This textbook takes care of generic skills embedded in various job roles in a comprehensive manner and also provides more opportunities and scope for students to engage with these common and necessary skills, such as communication, critical thinking and decision making in different situations pertaining to different job roles.

I acknowledge the contribution of the development team, reviewers and all the institutions and organisations, which have supported in the development of this textbook.

NCERT would welcome suggestions from students, teachers and parents, which would help us to further improve the quality of the material in subsequent editions.

HRUSHIKESH SENAPATY
Director
National Council of Educational
Research and Training

New Delhi
June 2018

About the Textbook

The IT/ITeS sector is growing at a fast pace and is an important industry in India and abroad. In the growing business opportunities in various domains around the globe, there is a huge transfer of information from one place to another. Large amount of data are churned thus creating a need for proper management of the data that are collected. The companies also have to concentrate on their core activities and resort to outsourcing the voice process. The rapid growth in IT industry along with the entry of many small and large outsourcing companies in this area, has led to a huge demand for trained personnel for various job roles, such as Customer Relationship Manager (CRM) — Domestic Voice.

The Customer Relationship Manager should be aware about the CRM software used to register customer queries and provide solutions to them. CRM Domestic Voice in the IT-ITeS Industry is also known as a Customer Service Associate, Customer Service Representative and Customer Care Executive, Customer Service Advisor, Helpdesk Coordinator, Customer Support Representative and Process Associate—Voice. Individuals in this job receive and make telephone calls, which are primarily scripted, basic and routine with the assistance of a computerised system. They answer enquiries, resolve problems, record complaints and/or receive feedback. This job requires the individual to work independently and interact with customers. The individual should be result oriented and should also be able to demonstrate logical thinking and interpersonal skills; ensure prioritisation of workload and should be willing to work at a desk-based job.

The textbook for the job role of 'CRM Domestic Voice' has been developed to impart knowledge and skills through hands-on learning experience, which forms a part of the experiential learning. Experiential learning focusses on the learning process for the individual. Therefore, the learning activities are student-centered rather than teacher-centered.

The textbook has been developed with the contribution of the experts for making it a useful and inspiring teaching-learning resource material for the vocational students. Adequate care has been taken to align the content of the textbook with the National Occupational Standards (NOSs) for the job role so that the students acquire necessary knowledge and skills as per the performance criteria mentioned in the NOSs of Qualification Pack (QP).

The textbook has been reviewed by experts so as to make sure that the content is not only aligned with the NOSs, but is also of high quality. The NOSs for the job role of CRM Domestic Voice covered through this textbook are as follows:

1. SSC/N3020 – Make outbound calls to customers
2. SSC/N9001 – Managing work to meet requirements
3. SSC/N9003 – Maintaining a healthy, safe and secure working environment

Unit 1 of the textbook is introductory and covers the basics of IT/ITeS industry, growth of IT sector in India, top BPO companies of India and different sectors of the IT industry. It further explains the concept ITeS in India, employment trends, outsourcing, different sectors in outsourcing jobs and knowledge about Business Process Outsourcing with various trends in the BPO Industry. The difference between domestic and international BPO, voice and non-voice process have been explained in this chapter.

Unit 2 of the textbook deals with the CRM Domestic Voice Training. It covers the purpose of the training programme, role and responsibilities of a CRM Domestic Voice. It also explains personal attributes of a CRM Domestic Voice and professional skills required for this role.

Unit 3 of the textbook covers the outbound calls, where the students can acquire the skills in interacting with customer using common vocabulary used in a domestic BPO. The various concepts, such as after-call work, agent group, agent out call, audiotex, auto wrap-up, automated attendant, automatic call distribution, etc., have been explained in this chapter. It also covers the basic need and importance of conversation with customer and the way to introduce yourself in an organisation. The concept of information security also has been explained.

Unit 4 of the textbook covers the working of FreeCRM web application. It covers different features of FreeCRM, such as creating a new contact use of import and or export of data files. For working with FreeCRM web application we need to understand sales targets, profile setup, calendar, creation and edit company, new contact, deal, task, case, call, call scripting and document folder. This chapter covers all these concepts.

Unit 5 of the textbook covers the work management, voice process and non-voice Process in BPO industry. The voice process covers the skills required for accepting orders, customer's service, tele-sales, and collection call. The non-voice process covers data entry, standard organisational policies and procedures for establishing contact with the customer.

Unit 6 of the textbook covers workplace safety and hazards in BPO industry and prevention of disasters/risk events like fire safety, falls and slips, first aid, security, electrical safety, accidents and emergencies. It also covers different workplace safety rules, handling accidents, types of emergencies, and safety at workplace with general evacuation procedures.

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THE CONSTITUTION OF INDIA

PREAMBLE

WE, THE PEOPLE OF INDIA, having solemnly resolved to constitute India into a [1]**[SOVEREIGN SOCIALIST SECULAR DEMOCRATIC REPUBLIC]** and to secure to all its citizens :

JUSTICE, social, economic and political;

LIBERTY of thought, expression, belief, faith and worship;

EQUALITY of status and of opportunity and to promote among them all;

FRATERNITY assuring the dignity of the individual and the [2][unity and integrity of the Nation];

IN OUR CONSTITUENT ASSEMBLY this twenty-sixth day of November, 1949 do **HEREBY ADOPT, ENACT AND GIVE TO OURSELVES THIS CONSTITUTION.**

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1. Subs. by the Constitution (Forty-second Amendment) Act, 1976, Sec.2, for "Sovereign Democratic Republic" (w.e.f. 3.1.1977)
2. Subs. by the Constitution (Forty-second Amendment) Act, 1976, Sec.2, for "Unity of the Nation" (w.e.f. 3.1.1977)

ACKNOWLEDGEMENTS

The National Council of Educational Research and Training (NCERT) expresses its gratitude to all members of the Project Approval Board (PAB) and officials of the Ministry of Human Resource Development (MHRD), Government of India, for their cooperation in the development of this textbook. The Council also extends gratitude to all the contributors for sharing expertise and valuable time by positively responding to the request for the development of this textbook.

The Council would also like to thank Rajesh Khambayat, *Joint Director*, PSS Central Institute of Vocational Education (PSSCIVE), Bhopal for providing support and guidance in the development of this textbook.

The Council also acknowledges the contribution of the Review Committee members Kamlesh Mittal, Retired *Professor*, DCETA, NCERT, New Delhi and Arti Goel, *Assistant Professor*, Hansraj College,University of Delhi, for carefully evaluating and giving suggestions for the improvement of this book.

We are thankful to Prakash Khanale, *Head*, Department of Computer Science, DSM College Parbhani for providing guidance and support in organisation of the contents for this textbook.

The Council is grateful to Saroj Yadav, *Professor* and *Dean* (A), NCERT, and Ranjana Arora, *Professor* and *Head*, Department of Curriculum Studies, for their sincere efforts in coordinating the review workshops for the finalisation of this book. Jayant Mishra, *Consultant* in IT-ITeS, PSSCIVE, NCERT, Bhopal is duly acknowledged for providing photographs of people used in Unit 3. The Council acknowledges the copy editing and valuable contribution of Shilpa Mohan, *Assistant Editor* (Contractual) in shaping this book. The efforts of Pawan Kumar Barriar, *DTP Operator,* Amrit Ohri, *DTP Operator* (Contractual) and Haridarshan Lodhi, *DTP Operator* (Contractual), Publication Division, NCERT, for flawless layout design are also acknowledged.

Contents

Do You Know

According to the 86^{th} Constitutional Amendment Act, 2002, free and compulsory education for all children in 6-14 year age group is now a Fundamental Right under Article 21-A of the Constitution.

EDUCATION IS NEITHER A PRIVILEGE NOR FAVOUR BUT A BASIC HUMAN RIGHT TO WHICH ALL GIRLS AND WOMEN ARE ENTITLED

Give Girls Their Chance !

Unit 1

IT-ITeS Industry

Introduction

Information Technology (IT) is one of the fastest growing sectors in the world today. The IT industry comprises two important components—Information Technology (IT) and Information Technology Enabled Services (IT/ITeS). IT is undergoing rapid evolution and is changing the nature of Indian business standards. Software development, consultancies, software management, online services and business process outsourcing (BPO), all come under the IT sector. ITeS are the services provided by BPOs.

The term Information Technology (IT) is widely used in the business world. IT/ITeS sector has emerged as a key provider to the Indian economy. Today IT/ITeS sector is driving the growth in BPO by generating employment opportunities. ITeS sector has made significant contributions to the Indian economy. This unit will introduce the basic concepts and ideas related to IT and ITeS.

Information Technology

Information Technology (IT) is the use of computer hardware and software technology to create, manage, store, update, exchange and analyse data and information in the context of a business or other enterprise. Computer system is used as a main component in information technology.

Fig. 1.1: Information Technology

Computer takes data as input, processes it and produces the results as output. In business data processing, the computer processes several sets of data and generates useful information. This information is used by people at large. This is how IT became important in the business world.

Information is the result of data processing. Data refers to facts or raw material, which are processed to get information. The number of boys and girls in a class is a factual data of the classroom. This is an example of data related to students in a class. Some conclusion can be drawn based on the data. This conclusion is information. Decisions are taken on the basis of this data and information.

India is one of the fastest-growing IT services markets in the world. It is also the world's largest outsourcing destination. The country's cost competitiveness, in providing IT services, continues to be its Unique Selling Proposition (USP) in the global sourcing market.

Information Technology-enabled Services (ITeS)

Information Technology (IT) that enables business activities by improving quality of service is called IT enabled Services (ITeS) or web enabled services. ITeS is the outsourcing of processes, enabled with IT. ITeS improves the overall efficiency of an organisation. It covers diverse areas like finance, HR, administration, health care, telecommunication and manufacturing. E-enabled services radically reduce costs and improve service standards. ITeS offers different services integrated in a single delivery mechanism to end users. These services provide a lot of career options that include opportunities in offices, such as Call Centres, Payrolls, Logistics Management, Revenue Claims Processing, Medical Billing, Coding, Medical Transcription, Legal Databases, Back Office Operations, Content Development, GIS (Geographical Information System), Web Services and HR Services, Customer Relationship Management, Data Entry and Data Processing, Software Development, Data Warehousing, IT Help Desk Services, Enterprise Resource Planning and Telecommunication Services.

Growth of IT Sector in India

As per the National Association of Software and Services Companies (NASSCOM) data, India's Information Technology-Business Process Management (IT-BPM) industry revenue, in financial year 2017–18, is recorded at US$151.0 billion, US$141 billion in 2016–17 and US$129.4 billion in 2015–16. IT-BPM exports also grew from US$107.8 billion to US$116.1 billion during the same period. The e-commerce market is estimated at US$33 billion, with a 19.1% growth in 2016–17.

According to the India Brand Equity Foundation (IBEF) figures, the Indian IT industry is set to touch US$225 billion by 2020 and US$350 billion by 2025. Industry experts and NASSCOM say the Indian IT workforce will touch 30 million by 2020, becoming the highest sector employer. In near future India's economy will require more hardware, software and IT services.

Top 10 BPO Companies in India

- **Genpact:** It is a multinational company, which handles national and international call centres allover the world. Genpact is ranked the number one BPO provider in India.
- **Tata Consultancy Services (TCS):** This BPO is recognised as one of the best in banking business process outsourcing (BPO) by Everest Group.
- **Wipro BPO:** It provides a broad spectrum of services across IT services and business process

outsourcing (BPO). It contributed approx 7.5% to India's Gross Domestic Product. Aegis Limited is a leading global business service provider of customer experience management.

- **Serco Global Services:** It offers a consulting-led approach and focusses on integrated end-to-end business services.
- **Infosys BPO:** Now called Infosys BPM, it is a reflection of the paradigm shift in the nature of services that the company now offers through its holistic approach of end-to-end transformative business process management (BPM).
- **WNS:** It is the world's most preferred Business Process Mangement (BPM) destination since the past two decades.
- **Global Services:** It is the world's most preferred business process management (BPM) destination since the past two decades.
- **Firstsource Solutions:** It is a leading provider of customised business process management (BPM) services.
- **Hinduja Global Solution:** It is a global leader in business process management (BPM) and optimising the customer experience lifecycle.
- **EXL Service:** It is an operations management and analytics company. EXL offers insurance, banking, financial services, utilities, healthcare, travel, transportation and logistics services.

Sub Sector of IT industry

IT industry can be broadly classified into four sectors.

- **IT Services:** It includes the services, such as consulting, systems integration, IT outsourcing/ managed services/hosting services, training and support/maintenance.
- **Business Process Management:** It deals with the management of one or more business processes by an external organisation. That, in turn, owns and manages the selected processes based on defined and measurable performance metrics.

- **Software Products:** It is the IT Industry segment providing services in the area of software products, through all or any of the product lifecycles.
- **Engineering Research and Development:** These services are those that augment or manage processes that are associated with the creation of a product or service, as well as those associated with maximising the life span and optimising the yield associated with a product or asset.

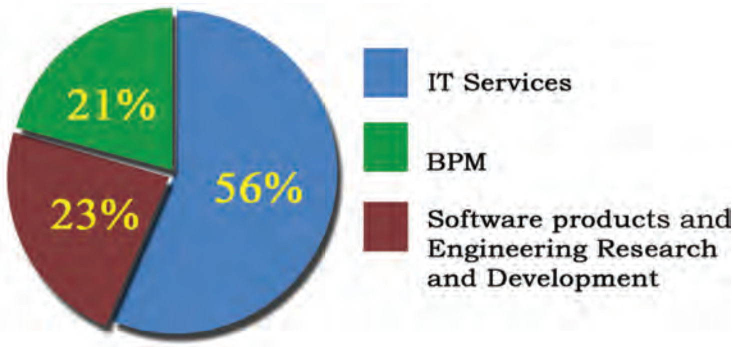


Fig. 1.2: IT Industry Sectors

About ITeS in India

1. Call centres provide customer interaction and communication services.
2. Non-public facing operations of various large companies are done in BPOs. For example, British Airways runs its reservation system from India.
3. Most of the top international banks channel their data-churning needs to their units in India.
4. ITeS sector includes services ranging from:
   - Call Centres
   - Claims processing, for example, insurance
   - Office operations, such as accounting, data processing, data mining
   - Billing and collection, for example, telephone bills
   - Internal audit and payroll, for example, salary bills on monthly basis

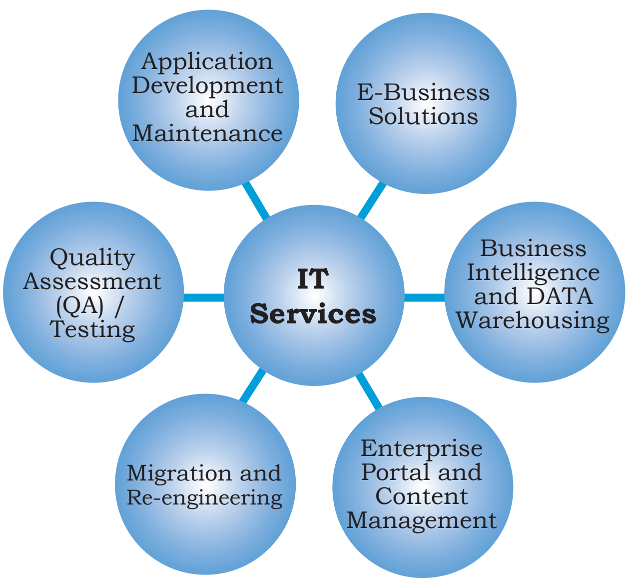


Fig. 1.3: Information Technology Services

- Cash and investment management, for example, routine jobs given to a third party and giving importance to core business.

Employment Trends

The IT and ITeS sector has generated and continues to generate a large number of jobs every year. There is great demand for IT professionals in e-commerce and business-to-consumer firms, especially with a progressing online shopping, social media and cloud computing world. With such immense opportunities in this sector, a large number of Indian and multinational companies (MNCs) are investing in expanding and setting up IT and ITeS businesses in India.

Outsourcing

Wedding ceremonies are a big deal nowadays. The hosts have to make all the arrangements, from the venue to the menu. It is not possible for one person to make all the arrangements for the various activities of the function. It has to be outsourced activity-wise or bundled together. It would be best to outsource such routine jobs to experts and do only those that are critical and need your attention. Outsourcing is the concept of offering contracts to experts or expert groups.

Fig. 1.4: Outsourcing

To understand it, let us read the story of two young friends, Amar and Shirish, who got married at about the same time.

Amar tried to make all the wedding arrangements himself. In the process, there was great confusion on the day of the wedding. The kitchen ran out of food, the fans stopped working. The workers ran to Amar for every little thing! Amar was busy attending to them while the unhappy guests started to leave. Finally, the bride too left!

Shirish, on the other hand, chose to outsource all the routine jobs, so that he could concentrate on his wedding and attend to his guests. His wedding was a happy and memorable affair.

This is what the companies with a large client base are doing. They sub-contract some of the jobs to other parties. The jobs that are sub-contracted are day-to-day jobs, such as

- handling customers' questions or complaints 24×7.
- preparing the salaries for their employees.
- telemarketing their products.
- collecting money from customers.
- sending out bills and other processes that support their main business.

These jobs are taken up by BPOs, while the main work or production, management of the business or branding remains with the company. This helps companies

- save time,
- reduce cost of resources and
- increase efficiency.

To a company, this would be the business of making profits and growing.

Different Sectors in Outsourcing Jobs

These services can be classified into different outsourcing sectors. They include:

Call Centre Outsourcing

Typically, Call Centre services include inbound and outbound services shown in Figure 1.5.

Inbound Call Centre services typically include answering services that are available 24×7. Call Centre agents can also be trained to up-sell and cross-sell services, take orders and provide information on the benefits and features of products/services.

Outbound Call Centre services include services like telemarketing, lead generation and market intelligence services.

Fig. 1.5: Call Centre Outsourcing

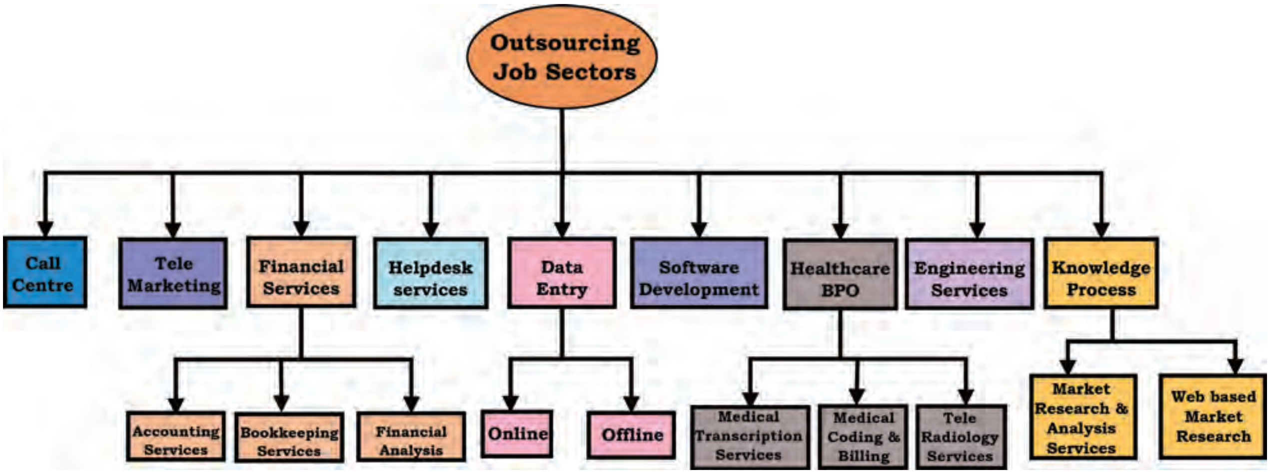


Fig. 1.6: Outsourcing Job Sectors

Technical Help-desk Services includes technical after-sales support for products and services. The various outsourcing job sectors are shown in Figure 1.6.

Knowledge Process Outsourcing (KPO) typically provides domain-based processes and employs advanced analytical skills and business expertise, rather than just process expertise. Figure 1.7 shows various research services provided by a KPO.

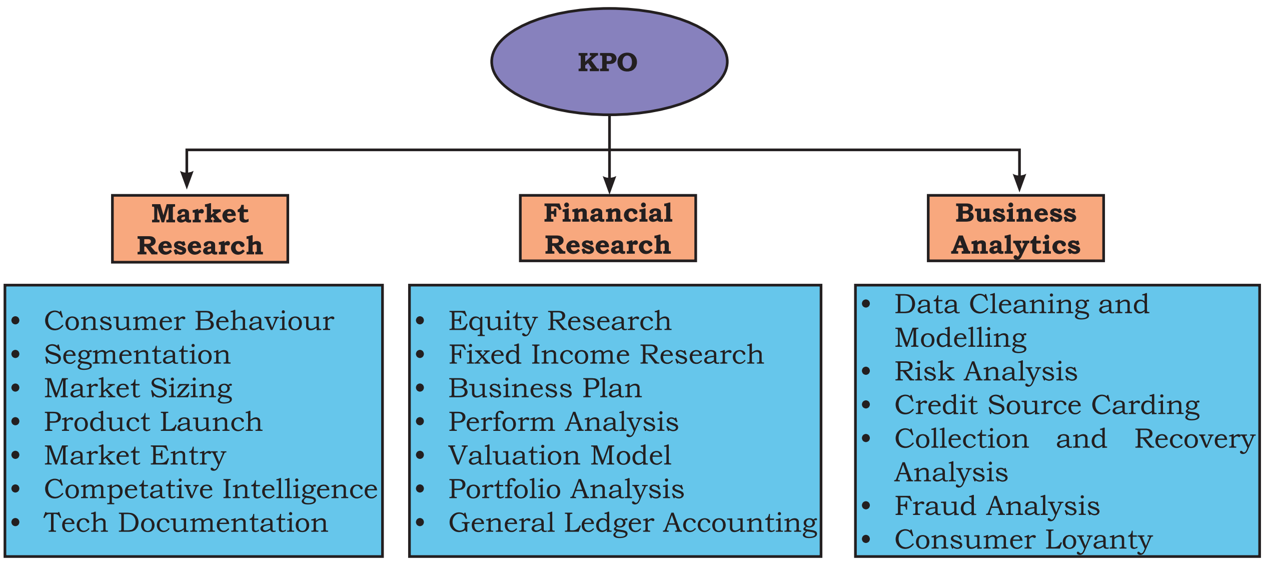


Fig. 1.7: Research services provided by a KPO

- *Market research and analysis* helps a business to extract useful information that reveals current trends and provides inputs for decision-making.

- *Web-based market research* helps to collect data from secondary sources like government publications and newsgroups.
- *Data Entry Outsourcing* is a requirement of all organisations, whether big or small. Data entry outsourcing can be divided into online and offline data entry.

  —*Online data entry* includes services, such as compilation of data from websites and e-books, updating online catalogues and creation of databases. A typical online data entry is shown in Figure 1.8.

  —*Offline data entry* includes services, such as offline data capture, fillings of forms, forms processing, data entry from one format or version to another, word processing, etc. A typical offline data entry is shown in Figure 1.9.

Fig. 1.8: Online Data Entry

Fig. 1.9 Offline Data Entry

IT Services Outsourcing

This includes outsourcing of software development. All activities related to design, development and testing are outsourced. In other cases, only a part or portion of the overall system is outsourced for development. This is in cases where the client does not have the requisite skills or technology for the development work.

Healthcare BPO Outsourcing

This includes a diverse range of Health Insurance Portability and Accountability Act of 1996 (HIPAA) compliant services. The services include:

- *Medical transcription services,* which include services to transcribe information from a variety of audio sources and file formats, such as MP3, MPG, MOV, DSS, WMA, etc.
- *Medical coding and billing services* are delivered using popular billing software like Medic and Lytec.
- *Tele-radiology services* provide 24×7 accesses to qualified radiologists.

Fig. 1.10: Healthcare BPO Outsourcing

Financial Services Outsourcing

- *Accounting services* include preparation of financial statements for the statutory annual audit, cash forecasting services and payroll services.
- *Bookkeeping services* include preparation and maintenance of both day-to-day books as well as monthly and quarterly accounts. It also includes preparation of reports like a sales reports.
- *Financial analysis services* include analysis of financial information such as financial statements, portfolio structures and offer documents.

Engineering Services Outsourcing

Fig. 1.11: 2D Open Source Software

This includes a range of mechanical, civil, structural and architectural services. The services include:

(i) Computer-aided design (CAD) services to develop prototypes

(ii) 2D drafting services

(iii) Conversion of paper drawings into a digitised format

(iv) Design and analysis for residential and industrial buildings

(v) Architectural visualisation services (3D rendering or 3D animations)

(vi) Services for evaluation and strengthening of deteriorating structures

Most of the business organisations opt for outsourcing is various activity for various reasons, such as minimising the cost involved in non-core activities and concentrate on strengthening the core competencies and core activities.

Business Process Outsourcing (BPO)

Business Process Outsourcing or BPO is a contract between two parties, where one party asks the other to manage and run some of its business processes.

Now take a look at this: **B P O**

B – Business here refers to a business house or corporate

P – Process refers to jobs

O – Outsourcing is the sub-contracting process to third parties

The BPO generally has a small reception to entertain one customer at a time, and the shop floor where the actual work takes place and the customer service representative (CSR) works. The CSRs are generally young with a dynamic personality and brilliant communication skills take calls from the customer and resolve their queries and have their own work station consisting of a computer desk and chair. The BPO can have voice and non-voice process. In voice processes the conversation is performed with customer over a phone call by way of talking to the customer and resolving customer queries. In non-voice process the conversation with the customer is done via electronic-communication through e-mail, messaging without talking to a customer on phone.

Fig. 1.12: Business Process Outsourcing

Trends in the BPO Industry

A domestic BPO offers their services to clients or customers of that country, while international BPOs offer their services to customers all over the world. For example, in the Indian context the domestic BPO offers services to the customers in India. To offer services the company has its toll free numbers on which customer can call and resolve their queries. When a customer calls on a toll free number of any company the call connects to the customer CSR in BPO.

Domestic BPO

A domestic BPO offers services to domestic customers. The services it offers are:

1. It provides after-sales service, customer care support and other data entry services.

Fig. 1.13: Domestic Call Centre Scenario

2. There are certain foreign companies that have a number of products being used by Indian customers, and so have establish their call centers in India. We can observe that many household electronic appliances—air conditioners, television, refrigerator of foreign companies, such as LG, Samsung, are largely used in India.
3. The domestic BPO industry has grown at a rate of 30% in the last five years. Today, India is ranked number 1 in the global BPO market. There are more than 500 companies offering BPO services in India. The rate, at which the BPO industry is growing, needs a large number of trained and well-groomed employees. It can provide employment opportunities to a talented pool of people in smaller cities and towns. It also discourages migration, as it gives an opportunity to individuals to work in their hometowns.
4. As a Customer Service Representative (CSR), one needs to be up-to-date with the established market trends and practices in sales and customer service. Customer service process that received only marginal attention have evolved into a primary functional area. Therefore, to ensure that the customers' demand for a responsive and reliable service is met, companies are using innovative methods and processes to strengthen their service level.

Real Time to Right Time

Fig. 1.14: Real-Time to Right Time

The main focus of real time to right time is resolve customers queries or product as per the given period of time. The challenges of scale will be difficult for most businesses and organisations.

The key then becomes communication and managing expectations. Successful customer service organisations are those that set, communicate and meet expectations rather than letting customers set the expectations for them.

Customer Service as a Marketing Opportunity

There is a focus on integrating customer service data into overall market research and customer experience. It is not about huge data but correlating data that helps to give us a better view of the customer. The customer service activity, community forums and knowledge bases will become more integral for improving customer service. The edge will go to the companies that can effectively mine their data and find value, whether it is in an improved customer experience or as a feedback loop to product development and marketing strategy.

Fig. 1.15: Marketing Opportunity

Multi-channel to Customer-centric

A toll-free phone number is a single channel for customer service. The focus will now be on the evolution of the integrated multi-channel customer service experience.

A customer may initiate an interaction on social media but expect a unified, integrated experience as the conversation moves through e-mail, web, voice and any other channels.

Fig. 1.16: Customer-centric

Competition and Beyond

A big side of the customer service experience is the interaction between customers and customer service agents. As much as customer service organisations focus on 'customer experience', they focus inwardly on the 'agent experience'. Customer service organisations increase adoption of competition and other techniques to improve agent confidence.

Motivating Customer Support Agents

Whether your business is Business-to-Business (B2B) or Business-to-Customer (B2C), in the end, customer service is often Person-to-Person (P2P). There will be an increased focus on the productivity and effectiveness of customer support agents. Happy, motivated customer service agents provide better support and a better customer experience.

Fig. 1.17: Motivating Agents

Focus on Self-service

One major trend in customer service is the move by companies to encourage customers for self service to solve their own service issues, as seen in retail industries. The self-service ranges from customers placing their own products in shopping bags, doing their own checkout, including scanning products and making payment. Customers needing information are encouraged by companies to first undertake the effort themselves by visiting special company-provided information areas. Only after they have explored these options, that they may contact customer service.

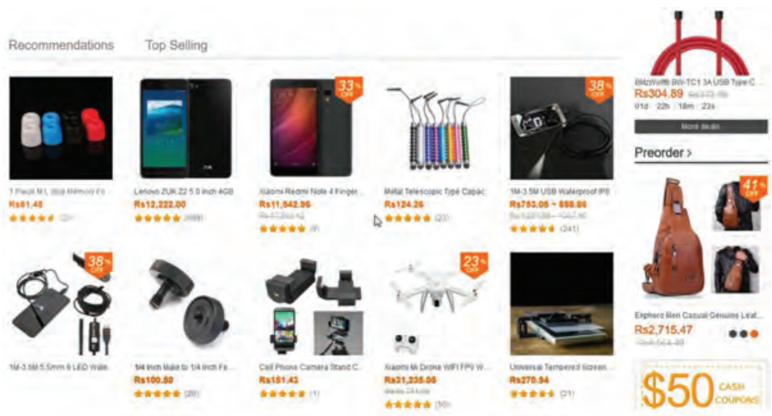


Fig. 1.18: Recommendations that Sell

Selling More

Companies that maintain a customer service staff, help to solve customer problems, also convince customers to purchase more. Many companies now require sales training for their customer service personnel. At a basic level, customer service representatives may be trained to ask if customers are interested in hearing about other products or services. If a customer shows interest, then the representative will transfer the customer to a sales associate. At a more advanced level, the representative will shift to a selling role and attempt to get the customer to commit to additional product purchase.

Technologies

Online Chat

As we will see throughout the principles of marketing tutorials, technological innovation has significantly impacted all areas of marketing. Improvements in computer hardware and software, as well as uncontrolled acceptance of the Internet as a prime channel for connecting with customers has led to numerous innovative methods to address customer needs.

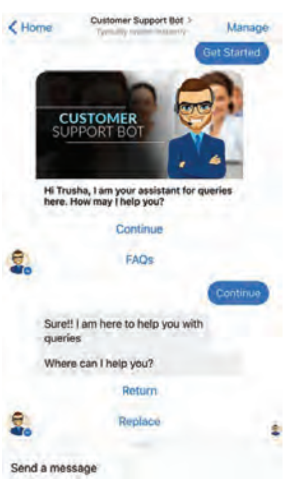


Fig. 1.19: Online Chat

For example, companies are finding value in using Internet chat as a way to address customer queries. Typically, the chat feature is presented via a pop-up browser window. This window appears when a customer clicks on a website link, though newer technology using computer programming, dubbed AJAX, allows for a chat to take place right on a webpage and not through pop-up windows.

Online chat sessions are undertaken in real-time with customers and company service people exchanging text messages.

More advanced chat technology, called collaborative browsing, allows customer service representatives to manipulate a customer's browser by sending webpages that contain relevant information.

Really Simple Syndication (RSS) Feeds

This is another Internet technology that is rapidly gaining a place in customer service. It is popular because of its use in Internet blogs and is now widely used on most popular websites or text messages. RSS allows a company to send out information quickly to a large number, with little manual effort compared to traditional methods. With RSS, customers are able to subscribe to a company's RSS feed and anytime the company updates information that is connected to a RSS feed (for example, website, text message), a notice is instantly sent to all subscribers.

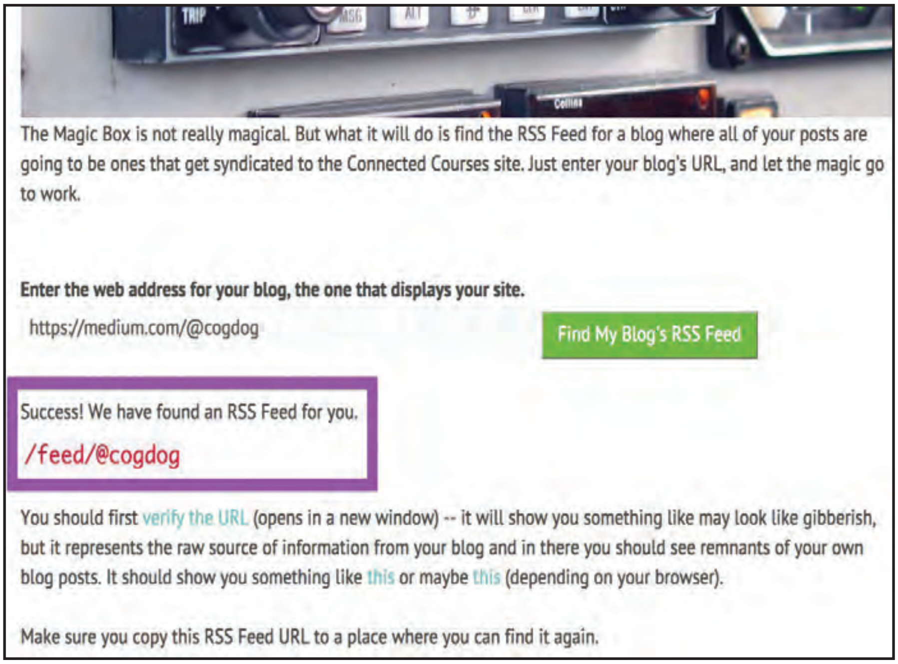


Fig. 1.20: Really Simple Syndication Feeds

Subscribers who have installed the proper software or have access to an online reader will see the information appear automatically.

Customer service has found RSS to be useful for communicating product updates, technical matters, such as product defects or recalls and general company communication, such as notification of special promotions.

Wireless Data Access

Fig.1.21: Wireless Data Access

Providing a high-level of customer services does not only occur when the customer initiates contact with an organisation. Customer service takes place during any potential interaction including those that may be initiated by a company representative who is meeting face-to-face with a customer. For instance, an organisation may send sales personnel with some other support personnel to a customer's location. Their ability to address customer concerns is vital to maintaining strong customer service.

To ensure that field personnel have the most up-to-date information, many companies now equip their field teams with portable devices that can access the Internet from any location. This is accomplished through wireless Internet connections, which allow the field personnel to access company computers and acquire customer data.

Practical Activity 1

Installing a Mobile App

Material required

Smartphone, Sim with Internet connection

Procedure

- Search 'Play Store' icon in Mobile
- Click on 'Play Store' icon
- In Play Store, search for e-pathshala App of NCERT. Click install.
- After installing the App, open it. App will ask for 'Allow to access your location'. Click OK.
- Then browse the book of your choice and read online.

Text Messaging

Once considered a play-toy for teenagers, text messaging is quickly being adopted as a tool for customer service. Many companies and organisations, including schools, colleges and universities, now use text messaging as a means to communicate with staff, parents or students. For instance, schools, colleges and universities have set up instant alert security systems where students can receive a text message in the case of an on-campus emergency or weather-related problem.

Fig. 1.22: Text Messaging

Practical Activity 2

Text messaging using mobile for activation of Internet setting service in mobile

Material required

Mobile phone, Sim with network provider connection

Procedure

- Select and click on the message icon in mobile.
- Write message EXAMPLE <SPACE> 201 on text area and send it to 555 number of network provider.
- After sending the message, the user will receive Internet setting messages. The user should save the settings and start Internet on mobile.

Internet Telephone Support

Despite the growth in Internet as an outlet for addressing customer queries, many customers still prefer to discuss their situation with a live person through a telephone conversation. For this reason, companies have moved to a technology called Voice over Internet Protocol (VoIP) rather than using the Plain Old Telephone Service (POTS). With VoIP, telephone calls are delivered over the Internet with multiple phones sharing the same connection.

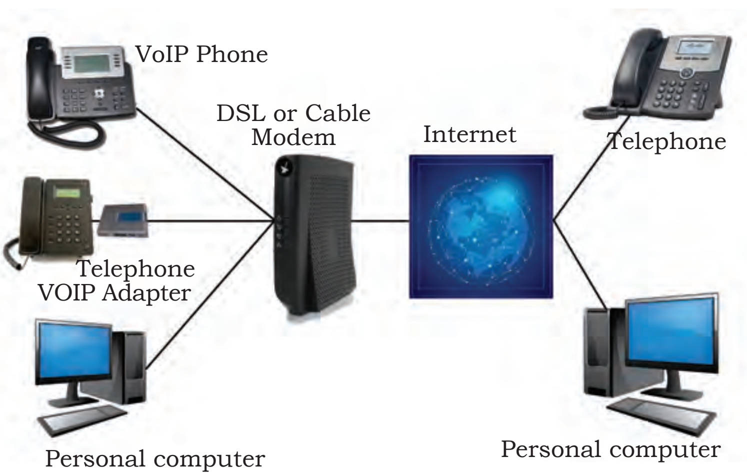


Fig. 1.23: Internet Telephone Support

With more people using the same line, the cost per call is reduced. While the audio quality of the call may not be as reliable as POTS technology, improvement over the last few years has narrowed the quality gap to the point where most customers cannot distinguish the difference.

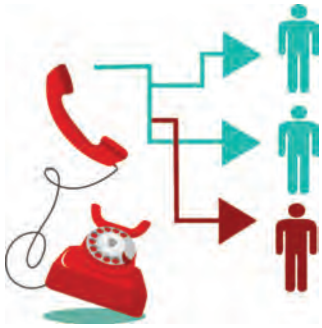


Fig. 1.24: Intelligent Call Routing

Intelligent Call Routing

Another novel technology associated with telephone support, deals with technologies that identify and filter incoming customer calls. One method is the use of software that attempts to identify the caller, usually based on the incoming phone number and then automatically directs the call for proper servicing. For instance, an appliance manufacturer may be able to distinguish between those who have purchased a refrigerator and microwave oven. But some marketers move a step further and can programme their call routing system to distinguish 'good' customers from others. This may result in these customers receiving preferential placement in the calling order or queue so that they will be serviced before lower-rated customers who sequentially may have called before the 'good' customer.

Fig. 1.25: Foreign Customer

International BPO

An international BPO offers services to clients from different countries. Such BPOs service has a whole range of multinational brands and foreign customers across culture, regions and geographical locations. An international BPO has been shown in Figure 1.28.

To work in an international BPO, you need a different set of skills. The work environment in an international BPO is different from that of a domestic BPO. Most international BPOs require their staff to work in shifts. Assume that you are working in an international BPO that serves American customers.

Fig. 1.26: International BPO calling

As you know, when it is night in India, it is day in America. So, you have to work in the night shift to serve American clients. Most international BPOs offer pick up and drop service for their staff and ensure their safety and comfort.

Table 1.1 Difference between Domestic and International BPOs

Domestic BPO	International BPO
• Fluency in national and local language • Speaking with natural accent • Speaking English fluently • Speaking with correct pronunciation, words and phrases in the national language and English • Understanding the needs of Indian customers in terms of their cultural backgrounds, language, mindsets and economic status	• Excellent fluency in English language • Voice and accent modulation as spoken by people of the country you service • Ready to work in shifts as different countries have different time zones • Understand and work as per the work standards of the countries you are servicing

Voice Process — Inbound and Outbound Calls

Now we will analyse the voice process in a Call Centre. In this process, the Customer Service Representatives or CSRs have to speak over the phone. They either take calls from customers or initiate calls to them. When a CSR takes calls, such calls are INBOUND or in other words incoming calls. When a CSR makes calls, such calls are OUTBOUND or in other words outgoing calls.

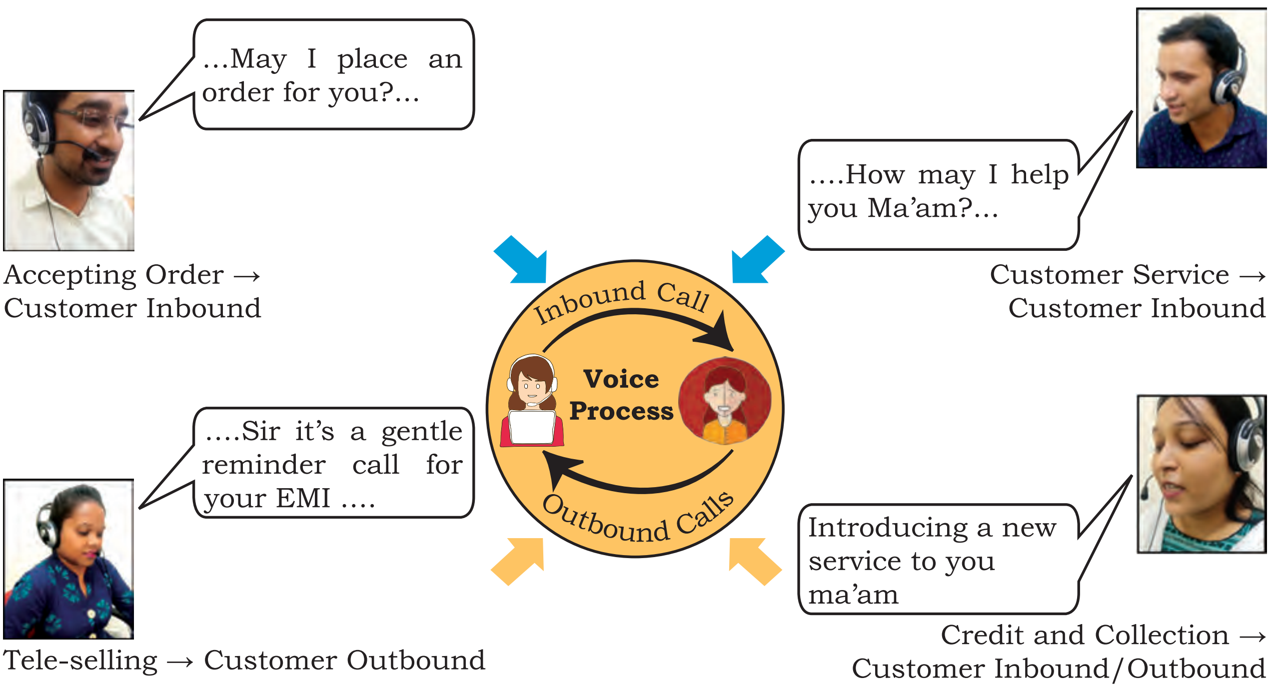


Fig.1.27: Voice Process

Voice Process

In the voice process, there are four kinds of jobs that you can do:

- Accepting orders
- Customer service
- Tele-sales
- Credit and collections

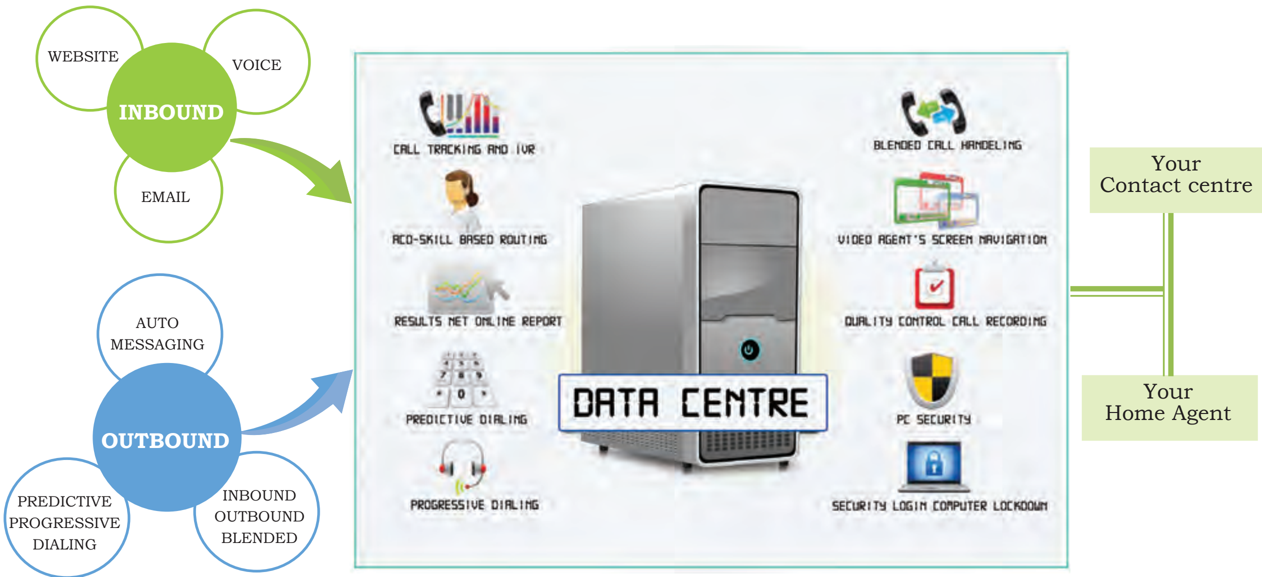


Fig. 1.28: Inbound and Outbound Calls

Accepting Orders

This involves taking orders from customers. It could be for any product that the customer has seen through a mailer or any online promotion. Accepting order calls are inbound calls.

As a CSR accepting orders, you must do the following:

- Make sure that you listen carefully
- Type the order request into your CRM software correctly

Customer Service

Customer Service means taking calls from customers. All these are inbound calls. A CSR, in customer service, may have to attend to 200 calls each day. This can be taxing, more so because most customer calls are complaint calls.

Tele-sales

In tele-sales, all calls are outbound. This job involves calling customers to make a sale over the phone.

Credit and Collections

In this division, the CSR calls the customers to recover pending payments. Sometimes, customers too may call to check on their payment status. That makes the calls both inbound and outbound.

Tip

Remember that you cannot afford to make typing mistakes. If you spell the name incorrectly it just goes into the database the way it was typed. Later, if the customer service department wants to retrieve the information, they will never find the name.

Non-voice Process

The non-voice process section does data entry work. Data entry could be of different kinds from papers, books and entries of business transaction, such as sales, purchases or payroll, insurance claim forms and so on. Besides, the non-voice section also does email correspondence with customers.

Fig. 1.29: Non-voice Process

KPO, HRO, LPO

BPO services set the standards for the future with the latest technology and services to enhance customer experience. It gives flexibility to build the career, change processes and service lines, learn new skills and move to new challenges.

There are other functions too that get outsourced.

- **Knowledge Process Outsourcing (KPO)** is outsourcing of jobs that require knowledge, skill and expertise. The work in a KPO involves processes like market research, survey analysis and data mining, as shown before in Figure 1.7.

Notes

- **Human Resource Outsourcing (HRO)** is outsourcing specialised HR-related activities. This segment of BPO involves work, such as payroll, compensation and benefit administration, keeping data of employee records, health benefits, etc.

Fig. 1.30: Human Resources

- **Legal Process Outsourcing (LPO)** is outsourcing legal-related activities. People who have studied law join LPO organisations but be it a BPO, KPO, HRO or LPO, only non-core jobs get outsourced. The core jobs are always kept with the company.

Fig. 1.31: Legal Process Outsourcing

Check Your Progress

A. Multiple choice questions

1. What is Business Process Outsourcing?
   (a) Outsourcing an information-producing function
   (b) Outsourcing an operational function
   (c) Outsourcing research and development
   (d) Outsourcing the payroll department

2. What are the skills required by a domestic BPO representative?
   (a) Fluency in the local language with natural accent
   (b) Excellent fluency in the English language
   (c) Both of the above
   (d) None of the above

3. In the voice process, which are the kind of jobs that a representative cannot do?
   (a) Accepting orders
   (b) Customer service
   (c) Keeping data of employee records
   (d) Credit and collection

4. What is an example of Business Process Outsourcing?
   (a) Using an outside company to function as a Call Centre
   (b) Using an outside company to function as the research and development department
   (c) Using an outside company to function as the payroll department
   (d) Using an outside company to function as the human resource department

5. What is Knowledge Process Outsourcing?
   (a) Outsourcing an information-producing function
   (b) Outsourcing an operational function
   (c) Outsourcing a Call Centre
   (d) Outsourcing the manufacturing department

B. State whether the following statements are True or False.

1. Growth of the IT sector in India is increasing every year.
2. Indian IT workforce will be the highest sector employer by 2020.
3. International BPO CSR communication needs fluency in national and local language.
4. Intelligent Call Routing is a new technology in telecommunication.
5. Every mobile phone has text messaging service.
6. Online Chat helps CSR for recommendation of online products services.
7. Call Centres provide customer interaction and communication services.

Notes

NOTES

C. Fill in the blanks

1. Indian IT industry is set to touch _____billion by year _____.
2. IT industry can be broadly classified into _________ sectors.
3. A _________involves processes like market research, survey analysis.
4. An international __________ offers services to clients from different countries.

D. Write the full form of the following acronyms

1. IT _______________________________
2. ITeS _______________________________
3. ISP _______________________________
4. BPO _______________________________
5. BPM _______________________________
6. CRM _______________________________
7. KPO _______________________________

E. Short answer questions (50 words)

1. What are the services offered by ITeS?
2. List the top 10 BPO companies in India.
3. What are the four sectors of IT industry?
4. List the various Call Centre outsourcing jobs in India.
5. What are inbound and outbound Call Centre services?

Unit 2

CRM Domestic Voice Representative Training

Introduction

CRM Domestic Voice training is necessary for Customer Support Representatives (CSRs). In this training the administrative user trainer trains employees to use the CRM software. It includes ways to use the software, handling the record, ways to greet a customer, voice pitch during customer call, maintain database, resolve the customer's query and give priority to customer satisfaction.

The training is normally given by outside company. They teach employees how to search through records, assign activities, deal with data workflows and create marketing campaigns. They also provide guidance on how to convert leads, create and manage service calls. These classes are typically offered online and onsite.

Fig.2.1: Introducing Own CRM Software to CSR

This training should not necessarily occur together. It can take substantial time to switch from old system to a new one because sales and data can be lost in the interim. Thus, you may want to perform the CRM training in multiple phases. That way, the company will face less disruption of day-to-day activities while employees attend classes and the departments can be switched over one at a time.

Introductory user training usually takes a full day, with one workstation for every two students. Admin-user training takes the same time but requires a workstation for each administrator. This is so that they can get enough practical experience to deal with the templates and different relationship roles. If your company has gone with a customised CRM system, the training time is typically extended to one-and-a-half days.

Purpose of the Training Programme

This training programme is developed to impart specific skills to individuals who wish to perform as a Customer Relationship Manager (CRM) Domestic Voice. The training programme is intended for imparting basic skill and knowledge. Companies that adopt a CRM system will need to properly train their employees on how to use the system. The company workers will need to know how to create leads and manage accounts, as well as make detailed reports with the software, or they won't be able to perform their basic duties.

Fig. 2.2: Training Programme

You will probably want to designate around 6 to 10% of the sales force automation budget for training purposes. This may seem like more than necessary but studies have shown that companies that put sufficient funds towards training employees on the CRM system.

Trainers should note that this training does not have to be performed by the vendor that sells you CRM system. There are numerous small businesses that specialise in CRM training and offer full certification programmes for employees. Many of them can also provide special package deals for your company.

If you like, you can use in-house IT person to provide the CRM training. They will need to read on the documentation first and know how to properly manage a CRM system. The main issue with this is that they might not be completely familiar with the software and some of its advanced features. This method tends to be much cheaper than hiring an outside company since the employee is already on the payroll.

The most important thing is that everyone receives proper training. If an employee doesn't know how to build a contact list or manage records, they can lose a potential customer. Training can help to ensure that employees know how to operate the system and the many special features that it offers.

Role and Responsibilities of a CRM Domestic Voice Representative

A CRM is expected to call the customer and inform them about the product and services. CRM calls the customer to get an appointment for a personal meeting by a Subject Matter Expert (SME). This SME will meet the customer and explain the entire concept, functionalities and usage of the product and services.

Fig. 2.3: Role and Responsibilities of a CRM Domestic Voice Represenatative

- A CRM is the voice of the company. They are the first point of contact with the customer. This makes the CRM's role very crucial.

Notes

- A CRM receives and makes telephone calls that are primarily scripted and include basic questions. They are used with the assistance of a computerised system. They inform the customer about the products and services offered by the company, answer queries, resolve problems, record complaints and/or receive feedback.
- A CRM is expected to communicate with customers to market and sell the products and services of the organisation.
- A CRM is required to talk to the customers politely and professionally.
- A CRM is required to know the products and their features properly so that they can convince and persuade the customer to buy the offered product or service.
- A complete training on technical and soft skills is given to the CRM to help them achieve this.
- Every CRM has to meet certain targets given for the month or quarter.

A CRM's performance is reviewed regularly. It is a CRM's responsibility to meet the given target and fare well during the review. This is one of the key areas of a CRM's role and responsibility.

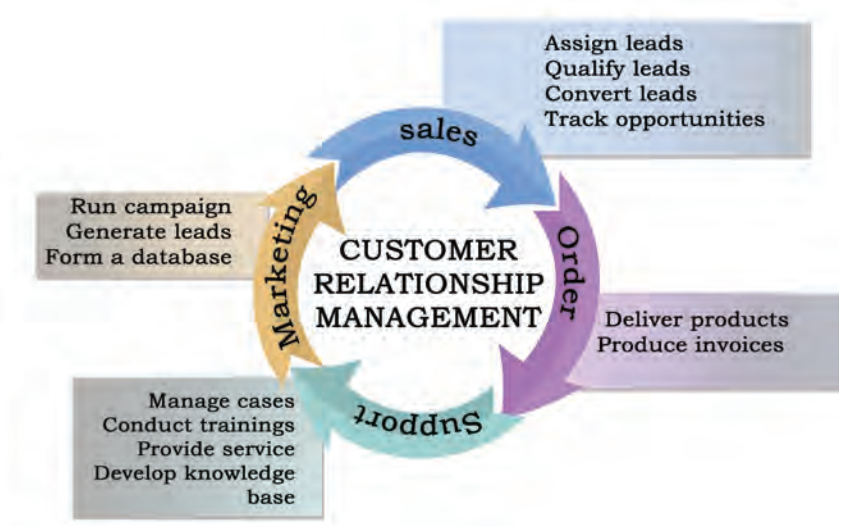


Fig. 2.4: CRM Cycle

A CRM is not only an individual contributor but also a contributor to the team machinery. It is crucial for them to discharge their responsibilities as a team contributor.

A CRM's role and responsibilities depend on other functions such as Human Resources (HR). HR includes planning and forecasting staff requirements and managing recruitment and selection. The HR team ensures that managers apply HR policies and procedures consistently across the business.

CRMs also heavily rely on the IT department. IT services install equipment and applications, manage databases and computer networks to provide the business with strong and effective information and communication channels.

Personal Attributes of a CRM Domestic Voice

A CRM has a crucial role to perform all activities. They convince the customers to buy products over the phone with their communication skills. A lot of preparation is required before the call is made. A CRM needs to know the product, their prospects and the relevance of the product to the prospect. During a call, the CRM needs to be alert, professional and intelligent in their approach. After finishing the call, it is important to document the call with complete details. If it is not documented properly, its further processing is affected at the customers end. This results in problems.

Fig. 2.5: Independently Interact with Customers

Notes

Like every job, the job of a CRM requires certain pre-requisite skills. This job requires a CRM to work independently and interact with customers. The individual should be result-oriented and should also be able to demonstrate logical thinking and inter-personal skills. They should ensure prioritisation of workload and should be willing to work at a desk-based job. It is crucial that a CRM has a positive attitude.

Professional Skills Required for the Role of CRM Domestic Voice

- Learning
- Communication
- Inter-personal
- Customer handling
- Time management
- Anger management
- Teamwork
- Telephone etiquette and the ability to respond professionally to clients on the telephone
- Attention to detail and the ability to follow specific instructions
- Problem solving skills over the telephone

Practical Exercise

Assignment 1

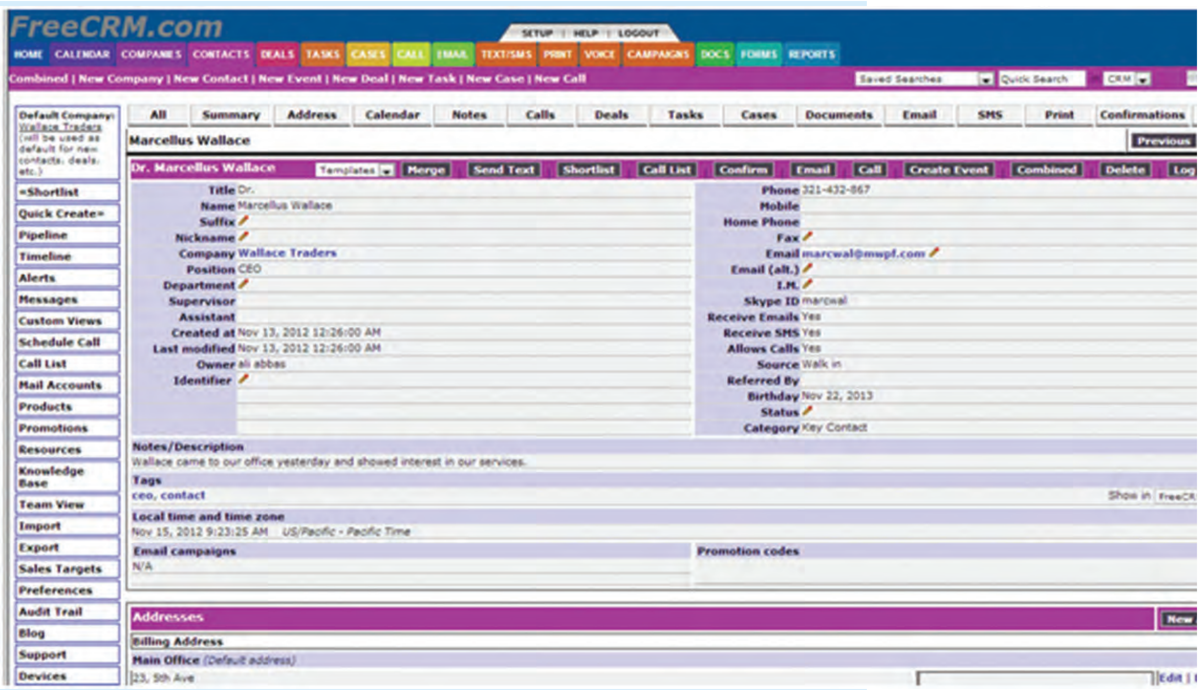
Demonstrate the training steps to insert a record in a CRM system.

Material required

Computer system, CRM software

Procedure

1. Write www.freecrm.com and enter login details.
2. Click on template.



Have the group work in pairs and discuss each of the following:

1. Products and services offered by the company
2. Recording complaints and receiving feedback

Check Your Progress

A. Multiple choice questions

1. While making a call, a CRM should speak with a customer ____________________.
   (a) professionally
   (b) casually
   (c) rudely
   (d) loudly
2. A CRM is the ________________ of the company.
   (a) face
   (b) voice
   (c) support
   (d) employee
3. After finishing a call, the CRM should _______________.
   (a) complete the documentation process
   (b) take a break

(c) toast about it to the Team Leader
(d) go home

4. A complaining customer is____________________.
(a) often right
(b) always wrong
(c) often lying
(d) always right

5. Who is a good customer service professional?
(a) Customer service professionals who do not provide a friendly voice; they are rude and refuse to help.
(b) Good customer service professionals who provide a friendly voice and face to the company while solving problems.
(c) Good customer service starts with how you treat every customer as valuable.
(d) Good customer service notes down the customer's problem.

B. Short answers question

1. List the roles and responsibilities of a CRM Domestic Voice Representative.
2. What are the professional skills required for a Customer Service Representative?
3. What are the professional skills required by a CRM Domestic Voice Representative?

Unit 3

Outbound Calls: Interacting with Customer

Introduction

At Outbound Call Centres, the calls are started by a Customer Support Representative (CSR), with their main goal being to provide services and sell a product to a customer. In other words, an Outbound Call Centre's main responsibility as a call centre agent, includes making outgoing calls to a bulk of people to offer services.

On behalf of an organisation, a CSR can call for a variety of reasons including performing customer support, sales and survey research. On the other hand, Inbound Call Centres focus only on receiving calls.

The main purpose of an outbound call can vary from one project to another. Here are some types of outbound calls and the nature of work.

Basically, several Outbound Call Centre services are direct mail, follow-up, production promotion, debt collection, appointment scheduling and up-sell/cross-sell campaigns. Outbound multinational companies are insurance and telecommunications, banking and finance, tourism, travel industry and hotels.

Interacting with Customers

Common Vocabulary of a Domestic BPO

Fig. 3.1: Abandoned Call

Here is a list of the common vocabulary used in the Domestic BPO. You will learn to pronounce it, read its meaning and use it in a sentence to understand its usage and improve your vocabulary.

Abandoned call is also called a lost call. If the caller hangs up before the call reaches a CSR, it is an abandoned call.

Example: 'Out of the six calls, four were abandoned calls.'

Adherence to schedule is a general term that refers to how well CSRs adhere to their schedules. It includes

(a) time spent on taking calls during a shift, including the time spent in handling calls and waiting for arrival calls.

(b) the amount of time a CSR was available to take calls.

Example: 'I had a good day today. I was able to adhere to the schedule well.'

After-Call Work (ACW) is also called Wrap-up and Post-Call Processing (PCP). It is the work that a CSR must do immediately after an inbound transaction. It often includes entering data, filling out forms and making outbound calls, necessary to complete the transaction. While the CSR is doing ACW, they are unavailable to receive another inbound call.

Example: 'I have to do my ACW properly.'

Agent is a person who handles incoming or outgoing calls. They are also referred to as CSR, Telephone Sales or Service Representative (TSR), associate, consultant, engineer, operator, technician, account executive, team member, customer service professional, staff member, attendant and specialist.

Fig. 3.2: BPO agent

Example: 'This is the accounts section, Sir. I will connect you to a customer service agent.'

Agent group, also called split, gate, queue or skills group, an agent group is a group that shares a common set of skills.

For example, there could be an agent group to handle customer complaints.
Example: 'ABC Company has 11 agent groups to handle the different processes.'

Agent Out Call is an outbound call placed by an agent.
Example: 'I have made 11 Agent Out Calls till now.'

Answered supervision is the signal sent by the Automatic Call Distribution (ACD) or other device to the local or long distance carrier to accept a call. That is when billing for either the caller or the Call Centre will begin, if long distance charges apply.
Example: 'The Agent took the call because she got the Answered Supervision signal.'

Answered call is when a call reaches an agent.
Example: 'In the last hour, we recorded the largest number of answered calls today. Congratulations!'

Fig. 3.3: Group of Agents

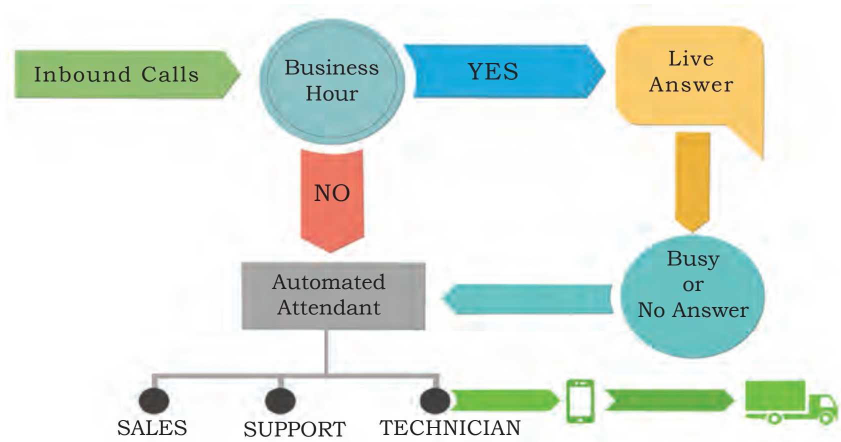


Fig. 3.4: Inbound calls

Audiotex is a voice processing capability that enables callers to automatically access pre-recorded announcements.
Example: 'The caller will first encounter the audiotex (pre-recorded calls) for new schemes of the company.'

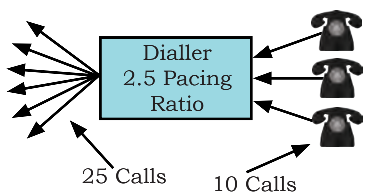


Fig. 3.5: Auto Wrap-up

Auto Wrap-up is an ACD feature whereby the program automatically puts agents into ACW after they finish 'talk-time' and disconnect calls.
Example: 'Something seems wrong with the auto wrap-up program. I am getting calls as I do my ACW.'

Fig. 3.6: Agent work state

Automated attendant are the prompts you hear when you make a call to a BPO, such as press 1 for sales, 2 for support and so on. The system prompts callers to respond to choices and then coordinates with the ACD to send callers to specific destinations. This voice processing capability that automates the attendant function is Automated Attendant.

Fig. 3.7: Automated Attendant

Example: 'The Automated Attendant is being updated to include the new promotion and it will be ready by tomorrow.'

Automatic Call Distribution (ACD) is the underlying factor for any Call Centre application. ACD offers a method for distributing incoming calls efficiently and equitably among available agents. With ACD, incoming calls can be directed to the first idle or most idle agent within a group of agents. Agents in an ACD environment are assigned to a hunt group—a group of agents handling the same type of calls. A track group is especially useful when you expect a high number of calls to a particular phone number. A track group might consist of people trained to handle calls on specific topics.

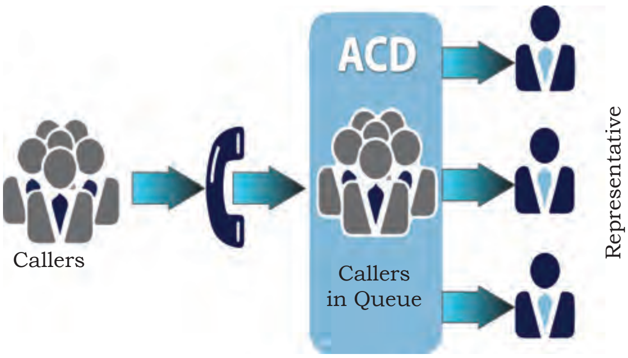


Fig. 3.8: Automatic Call Distribution

Example: 'The ACD is central to a Call Centre application.'

Work state is typically not associated with handling telephone calls. When agents are in support mode, they will not receive inbound calls.

Example: 'How many agents are in a support Work State at any point of time?'

Average Handle Time (AHT) is the sum of the Average Talk Time and Average ACW for a specified time period.

Example: 'What was the group's AHT today?'

Beep tone is an audible notification that a call has arrived also called Zip Tone. Beep tone can also refer to the audible notification that a call is being monitored.

Example: 'There's the first beep tone of the day!'

Fig. 3.9: Beep tone

Busy hour is a term used to indicate the telephone trunk. It refers to the hour of time in which a trunk group carries the most trunks during the day. The average busy hour reflects the average over a period of days, such as two weeks. Busy hour has little use for incoming call centres, which require more specific resource calculation methodologies.

Example: Usually mid-day hours are called busy hours.

Call blending combines traditionally separate inbound and outbound agent groups into one group of agents responsible for handling both inbound and outbound contacts. A system that is capable of call blending automatically puts agents who are making outbound calls into the inbound mode and vice versa, as per the incoming call load.

Example: 'Today, we will have to resort to call blending as the new promotion will increase the incoming call load.'

Call-by-call routing is the process of routing each call to the optimum destination according to real-time conditions.

Example: Usually all agents get calls through call-by-call routing.

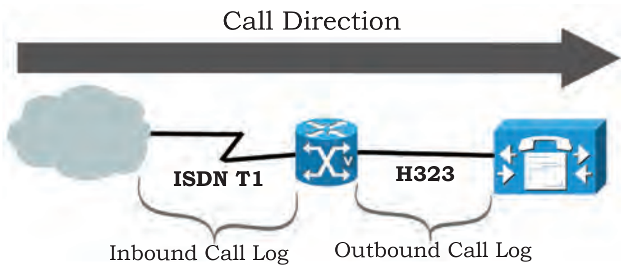


Fig. 3.10: Call-by-Call Routing

Call forcing is an ACD feature that automatically delivers calls to agents who are available and ready to take calls. They hear a notification that the call has arrived, for example, a beep tone, but do not have to press a button to answer the call.

Example: Three agents are available for call forcing.

Calls in queue is a real-time report that refers to the number of calls received by the ACD system but not yet connected to an agent as we see in Figure 3.8.

Example: 'The calls-in-queue report is being sent by e-mail for you to check.'

Collateral duties are non-phone tasks, such as data entry that are flexible and can be scheduled for periods when call load is slow.

Example: 'I am waiting for some free time to finish my collateral duties.'

Conditional routing is the capability of the ACD to route calls based on current conditions. It is based on 'if-then' programming statements. For example, "if the number of calls in agent group one exceeds 10 and there are at least two available agents in group two, then route the calls to group two."

Example: 'Group two took several conditionally routed calls.'

Database call handling is an application, whereby the ACD works in sync with the database computer to process calls, based on information in the database. For example, a caller inputs digits into a voice processing system, the database retrieves information of that customer and then issues instructions to the ACD on how to handle the call. For example, where to route the call, what priority the call should be given in queue, the announcements to play.

Example: CRM is aided by database call handling.

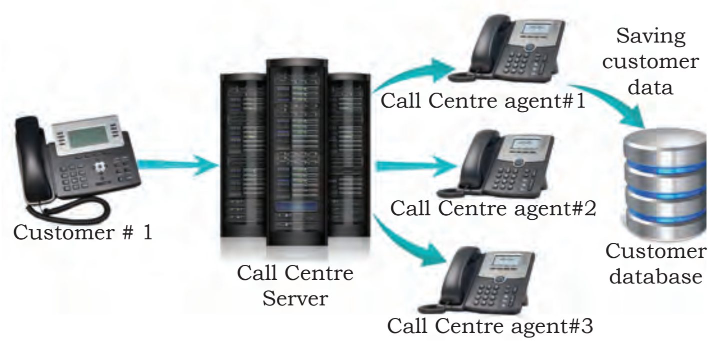


Fig. 3.11: Database Call Handling

Delay is also called Queue Time. The time a caller spends in queue, waiting for an agent to become available. Average Delay is the same thing as Average Speed of Answer.

Example: Too many delays means callers are not being served.

Delay announcements are recorded announcements that encourage callers to wait for an agent to become available, remind them to have their account number ready and provide information on access alternatives. In some systems, delay announcements are provided through recorded announcement routes (RANs).

Example: The caller has to listen to delay announcements for 2-3 minutes.

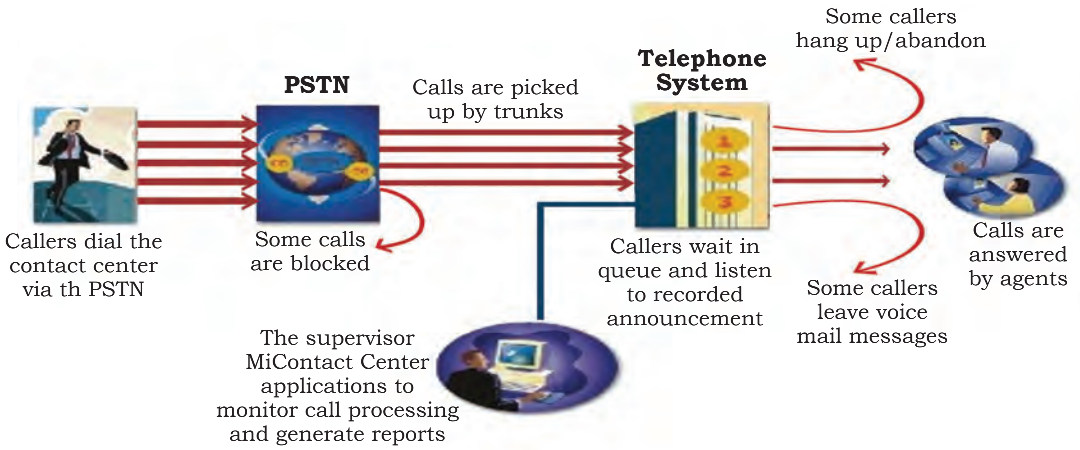


Fig. 3.12: Delay Announcements

Error rate is either the number of defective transactions or the number of defective steps in a transaction.

Effectiveness of agent is determined by their error rate.

Fast clear down is when a caller hangs up immediately after hearing a delay in announcement.

To Make a Good First Impression

Fig. 3.13: CSR with Impression

Here are some basic points that tell you how to create a good first impression with people in general:

- Be well groomed: Dress neatly. Maintain personal hygiene.
- Be polite: Use polite expressions, such as 'please', 'thank you', 'could I', 'may I' and so on.
- Show positive body language: Smile and have a pleasant face.
- Always be punctual: If you have promised to see someone at a certain time at a certain place, honour the commitment. Do not make people wait. If you are late, call up to inform about the delay.
- Be helpful: Offer help whenever you can. Be courteous.
- Switch off mobile phones when in discussions: Keep your phone switched off or on the silent mode when you attend an interview or an important discussion. If you must take the call, then say 'excuse me, may I take this call please' before answering the call.

1. While opening the call

(a) Greet in a cheerful voice.

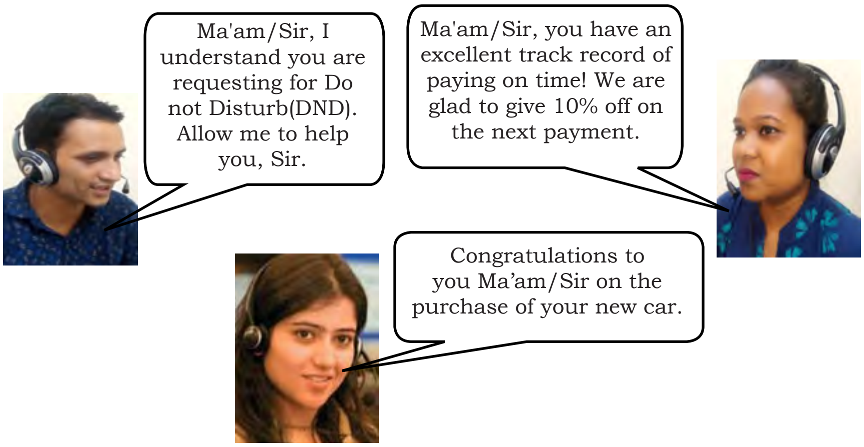
Notes

2. During the call

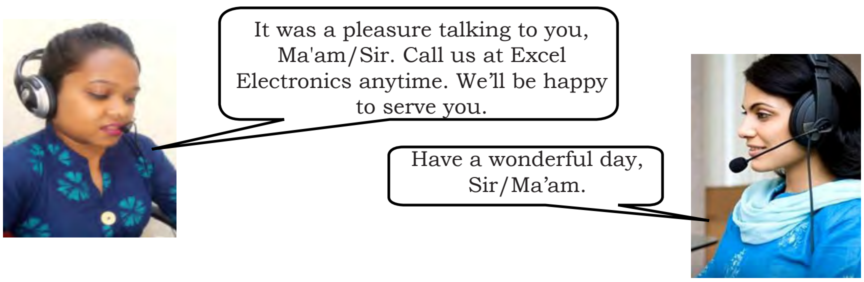
(a) Empathise with the customer.

(b) Register the customer's request.

(c) Extend excellent service at all times, which includes all telephone etiquette to be followed.



3. While closing the call



All the above phrases when said in the right tone and with the right expression make the customer feel good and cared for. It creates a good impression not only about yourself but also about the company that you are representing.

Good first impressions are made with the

- right tone of voice.
- correct choice of words used.
- service you provide.

Introducing Yourself to Peers and Bosses

How would you introduce yourself to your peers? Is it the same as introducing yourself to your boss?

Example 1: Ajay introduces himself to Riya and Diya.

Ajay: "Hi, I am Ajay and I have just joined. I am excited! And I would love to get some tips from you guys on how to work here."

Example 2: Now let us see how to introduce yourself to your seniors. While introducing yourself to your bosses, be respectful yet friendly. For example, Diya introduces herself to Sameer, a senior manager.

Diya: Good morning, Sir. My name is Diya. I have just joined and I am looking forward to learning from you."

Fig. 3.14: Introducing yourself to Peers and Bosses

From the above examples we know that we must be:

- Casual and approachable with peers.
- Respectful yet friendly with seniors.

Introducing Yourself to Customers — Inbound Calls

If you think introducing yourself to customers is a mere formality, you are wrong. Proper introductions helps to establish a credible and long-term professional relationship. It is important for you to know the correct way to introduce yourself to your customers. Let us see some common ways of introducing oneself to customers while taking inbound calls.

Let us see each sentence one by one.

Diya's Introduction

In case of Diya, she thanks the customer for calling. She then says her name and asks how she may help the customer. This is a standard way of introducing yourself over the phone for all inbound calls.

Ajay's Introduction

You may greet the customer with the correct time of the day. Ajay, being in 'accepting order', also confirms the purpose of the call before reading out his script from the CRM. Sometimes customers may end up calling the wrong service option. So, it is best to take a confirmation before proceeding.

Savita's Introduction

Savita speaks in the local regional language to service a customer who opts to communicate in the local language.

Riya's Introduction

Riya has a slightly uncommon way of opening the call. She sounds cheerful, cuts the ice and makes the customer feel good.

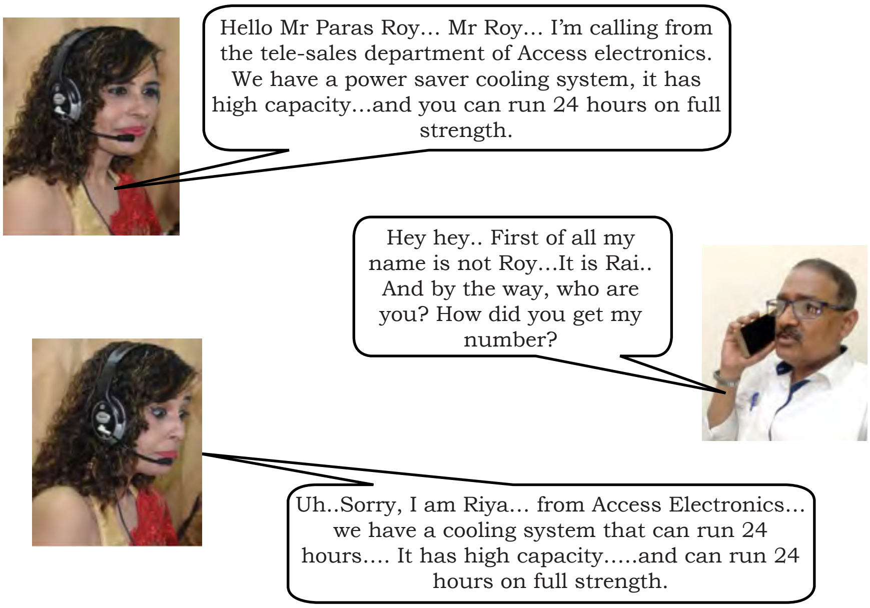
Remember these points for introducing yourself while taking inbound calls:

- **Common Greeting** is a simple and polite way of greeting like 'How may I help you?'
- **Confirm** the purpose of the call, especially for order-taking, where one has to read from a script.
- **Ice-breaker** is a simple question to make the customer feel comfortable.
- **Tone** should be polite but enthusiastic. You should sound happy to be of service.

Introducing Yourself to Customers — Telesale Calls

The two main areas of outbound calls are telesales and credit collection. In outbound calls, you are calling the customer – you are imposing on the customer's time. So the first three seconds of your call will either make or break the situation! Let us see a scenario to understand this better.

Riya makes a call to a customer to sell a cooling system for his office. The customer's name is Paras Rai. Read on to find out more...



The customer cuts the call. Why?

- Riya mispronounced the customer's name.
- She was impatient and rushed into a long monologue about the product.
- She did not ask the customer if it was a good time to talk.

Remember these points while introducing yourself during a telesales call:

- Cut the ice with the customer.
- Pronounce the customer's name correctly.
- Use salutations, such as Mr, Miss or Mrs to surnames and NOT first names.
- Ask the customer if they have the time to talk. Do not force them into a conversation.
- Put forth the main attractive points of the product, instead of giving a boring speech about the product.

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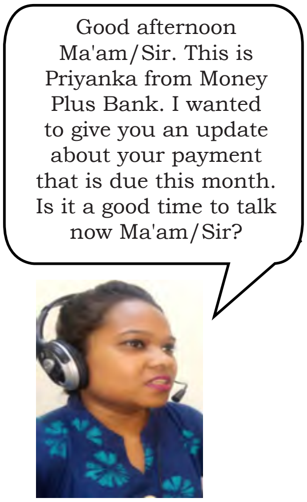

Introducing Yourself to Customers — Collection Calls

The second category of outbound calls is in credit or bill collection. You may be calling to recover an outstanding amount, but you still need to be polite and ask for the right time to talk. Let us see this scenario to understand it better.

This is an example of excellent introduction! You can see how Priyanka introduces herself politely after a greeting. She states the purpose of her call and then waits to know if it is a good time to call. She is sure to get a much better response from the customer than a rude or impatient CSR.

Remember these points while introducing yourself during a collection call:

- Greet the customer.
- Introduce yourself politely.
- State the purpose of your call.
- Wait to know if it is a good time to talk.

Tips

- Introducing yourself effectively shows that you take your job seriously and are committed to the job.
- It shows you are competent and professional.
- It shows enthusiasm. If you are enthusiastic about introducing yourself, you appear cheerful to those you introduce yourself to.
- Introducing yourself helps you to become familiar with everyone including your customer.

Know Personal Strengths and Weaknesses

Are you aware of your personal strengths and weaknesses? Not sure, then read on to know about Priyanka, a CSR. You may get some hints.

Priyanka works for BPO. She starts her day early. Before leaving for work, she makes it a point to catch up with her parents on their health and the needs of the household, so that she can pick them up on her way back home from work. Each day, when Priyanka reaches office, the security guard greets her at the gate. But Priyanka stays indifferent. Her behaviour with her peers too, is one of indifference. However, with her Team Leader, she is overtly polite and courteous! Strange! She is particular about her work. She is punctual, organised and precise. Priyanka likes to keep to herself. She does not believe her colleagues are as good as her in terms of work! But if a peer approaches her for help, she does not hesitate.

Even as you read this, you can make out that Priyanka has some positives and some negatives to her personality. Let's classify them as strengths and areas for improvement.

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Strengths

- **Disciplined:** Priyanka is an early riser. Her daily routine follows a certain system. At work too, she is punctual and organised.
- **Responsible:** Priyanka feels the burden of running a household. She checks on her parents for their well-being and the needs of the house every day.
- **Respectful of authority:** Priyanka is respectful of authority, which is evident from her behaviour towards her team leader.
- **Helpful:** Priyanka has a helpful nature. She helps her peers.

Areas for Improvement

- **Lacking in civility:** Priyanka seems to be mindful of whom she interacts with! She does not seem to be able to treat all classes and sections of society with equal regard and consideration. This is evident from the way she ignores the regular greetings of the security guard of her office.
- **Indifferent towards peers:** Priyanka's attitude towards peers is to be condemned. While she is respectful of authority, she seems to be completely indifferent to her peers. This is surely not the quality of a team player!

Compose 'Strengths'

Would you like to do a self-check on your strengths and areas for improvements now? If you possess these qualities, then they are your strengths:

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- **Ability to learn new things:** If you are a quick learner then it is a strength.
- **Communication skills:** Effective communication skills is a strength you must develop. As a CSR has to make and receive calls, good listening and speaking skills are the only way to be successful.
- **Self-motivation and focus:** If you can motivate yourself and stay focussed without getting distracted, it is a sure strength.
- **Team player:** You cannot work in isolation. In today's world, a person needs to be a good team player. The team's success will be your success. Be a team player and make it your strength.
- **Hard-working:** Success is 90 per cent hardwork and 10 per cent brain work. Be hardworking and make that your strength.
- **Self-confidence:** Your self-confidence is the reflection of your behaviour. It shows that you are not afraid of challenges and take them head on. If you are confident, you become reliable.
- **Patience:** As a CSR, you must develop this strength. You are expected to handle over 200 calls in a day, most of which will be irate calls. You have to be patient and deal with them.

Ways to Overcome Weaknesses

Glorifying our strengths while ignoring our weaknesses can be dangerous. Weakness is nothing to be ashamed of; it is a part of human nature. We always want to know what works best for us and what will help us reach our goals. It is not weakness but strength that will take us where we want to go. First, we need to identify our weaknesses and then find ways to turn them into strengths. Here are some weaknesses you may have and how to overcome them.

Anger is just one word away from danger. It can consume you and shatter your personal and professional life. Control your anger.

Arrogance is when you think you know everything. That is when you weaken yourself because you stop learning. You are also easily hurt when someone criticises you. This hampers your growth. Take others' opinions positively as an opportunity to improve yourself and be open to learning new things.

Ingratitude is the failure to be grateful for what we have. It comes in the way of our happiness, weakens relationships and blocks good things from entering our lives. Live with a grateful heart and you will live a long and happy life.

Insecurity makes you feel inferior to others. This weakness will de-motivate you and make you jealous of others. Instead learn from others, what you lack.

Being unorganised can damage your career. You have to be organised while doing your work. Being organised will help you manage your time effectively and make you more efficient.

Negative attitude will lead you to destruction. It slowly pulls oneself in, first with people, then with work, then with situations and finally consumes you.

Everyone has personal weaknesses. Those of us who are wise, recognise them and try to overcome these character flaws. Others ignore their personal weaknesses and find themselves repeating mistakes and leading unfulfilled lives. The secret to self-improvement is to discover your weaknesses and either correct them or find a way to turn them into strengths.

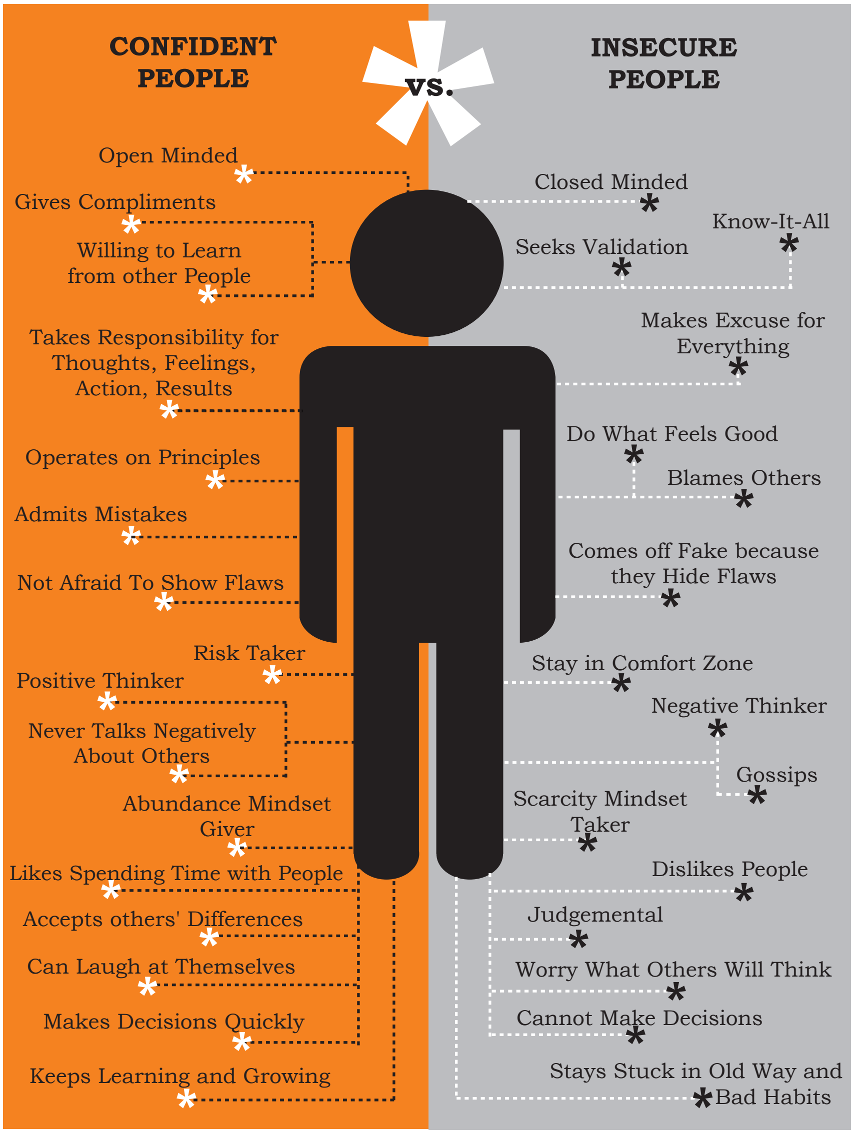
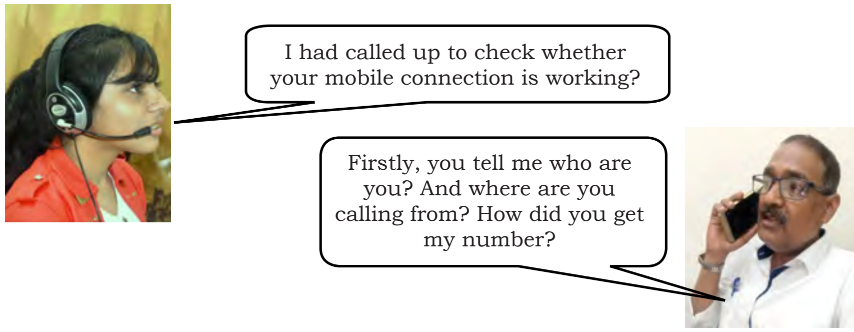


Fig. 3.15: Strengths and Weaknesses of People

Notes

The Need for Meeting and Greeting

Let us read this scenario to understand the need for meeting and greeting.



From the above conversation we can see that the customer does not know who is calling and from where. The customer has also become a bit nervous and anxious as he wonders how the caller got his number. In extreme cases the customer may disconnect the call and stop answering calls from unknown numbers. This shows that the CSR is

- not serious about the work.
- not interested in finding out the customer's name and other details before calling.
- not concerned about providing a better service to the customer.

Tips

- Make a week-by-week plan to overcome your weaknesses.
- Always monitor your strengths and try to maintain them.
- If someone points out your weakness, thank them.
- Your strengths should outnumber your weaknesses.

Ways to Greet

- **Greet depending on the time of the day:** Say 'Good morning' between 8 am to 12 noon, say 'Good afternoon' between 12 noon to 4 pm, 'Good evening' while opening a call between 4 pm to 9 pm and say 'Have a good day' while closing the call any time of the day.
- **Standup when you meet someone:** This shows that you respect the person. It also helps you come to a level where you can have eye-to-eye contact.

Notes

- **Introduce yourself immediately:** If someone approaches/calls you or you call/approach someone for the first time, telling your name after/ before greeting. For example, “Hello my name is Devansh, pleased to meet you.” (face to face) or “Hello sir, my name is Devansh and I am calling from Global7 Telecom” (over the phone).
- **Offer a handshake:** Extend your hand as you greet. The person who puts a hand out first shows confidence and friendliness.
- **Smile:** Facial expressions speak more than your words. Look as if you are pleased to meet the other person regardless of what is on your mind. Put a smile on your face for the person standing before you.
- **Greet others with their name:** Greet others using their name and make sure you continue using it. This makes the person feel important and makes them feel that you care about them personally. For example, "Hello Mr. Ghosh, is it a good time to talk?"
- **Be focussed on the customer and not on self:** If you are calling a customer, keep your focus on the customer and their needs. Keep any conversation surrounding you to a minimum and enable the customer to talk about self.
- **Do not be too casual while greeting:** Never use words like ‘Hi’, ‘What's up’, ‘Guess who’, while calling the customer or while addressing your superiors. This shows that you lack manners and cannot differentiate between friends and professionals.
- **Thanking:** Always thank the customer by saying, “Thank you for calling”, before closing the call. Thank everyone irrespective of whether the person is a supervisor, friend or customer depending on the situation.
- **May I help you:** Asking the customer, May I help you, sends a message that you, as a CSR, care about the needs of the customer.

Notes

Importance of Meeting and Greeting

Let us look at a scenario to know the importance of meeting and greeting.

CSR: "Hello, Mrs Desai. I wanted to inform you about our new offer."

Customer: "Who is calling? What is the name of your company and what is the offer?"

CSR:"Oh God! I forgot to tell you my name. I am Shruti calling from ABC mobile. How are you doing?"

Customer: "I am busy now."

From the above scenario it is clear that the CSR lost the customer because of

- improper greeting.
- improper introduction.
- being too informal.

Meeting and greeting a customer in an unprofessional manner creates a bad impression about you and the company in the customer's mind. It is, therefore, very important to make the customer feel good in the first few seconds of the call itself by way of correct greetings and introductions.

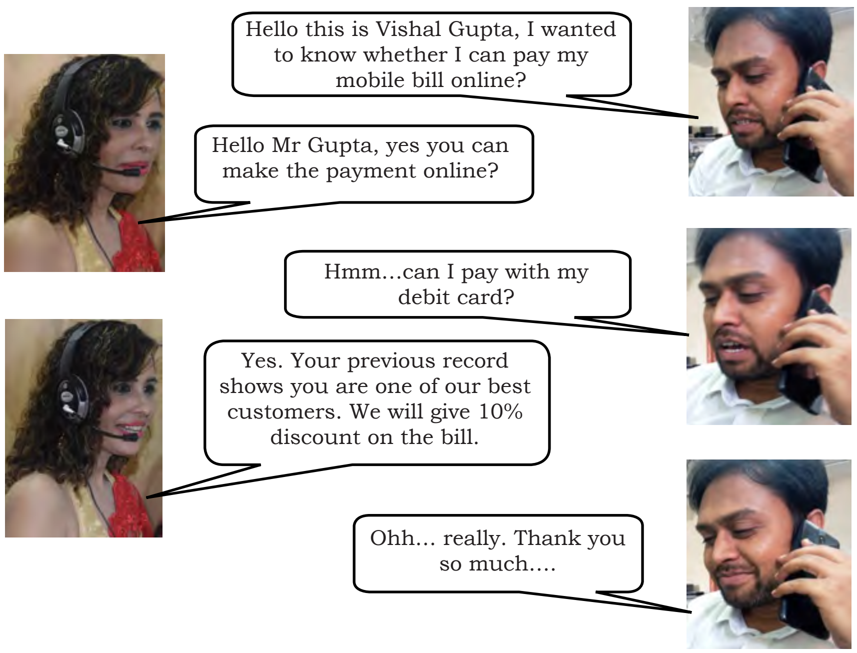
Tips

- Always start a conversation by greeting first and then introducing yourself.
- First see the time of the day and then greet accordingly.

Need for Complimenting and Commenting

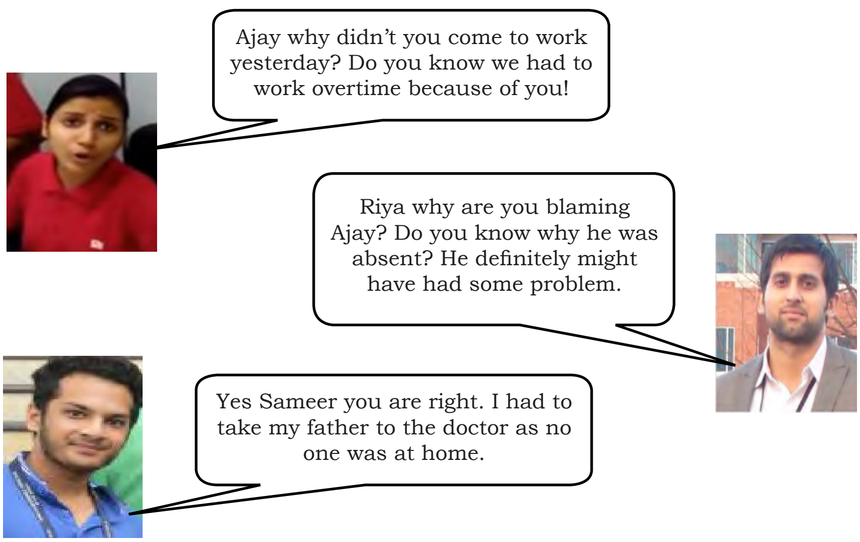
Have you ever thought about the power of beautiful words people often use and how this can really help you feel good about yourself the whole day? Yes, there is nothing like a warm and a sincere compliment to make your day. Whenever you compliment someone it makes them feel important and cared for. It has the same effect on you if someone gives you a compliment. Similarly giving a positive comment to a colleague acts as a friendly advice without hurting their feelings.

Let us learn the need for complimenting and commenting through these scenario.



The CSR guides the customer on the phone to pay online through debit card and offers discount on online payment. This makes the customer feel good and confident.

Scenario 2



In the above scenario you can see how Sameer gives a positive comment to Riya about why Ajay was absent. A comment spoken in a positive way helps in

- overcoming misunderstanding.
- showing respect for one another.

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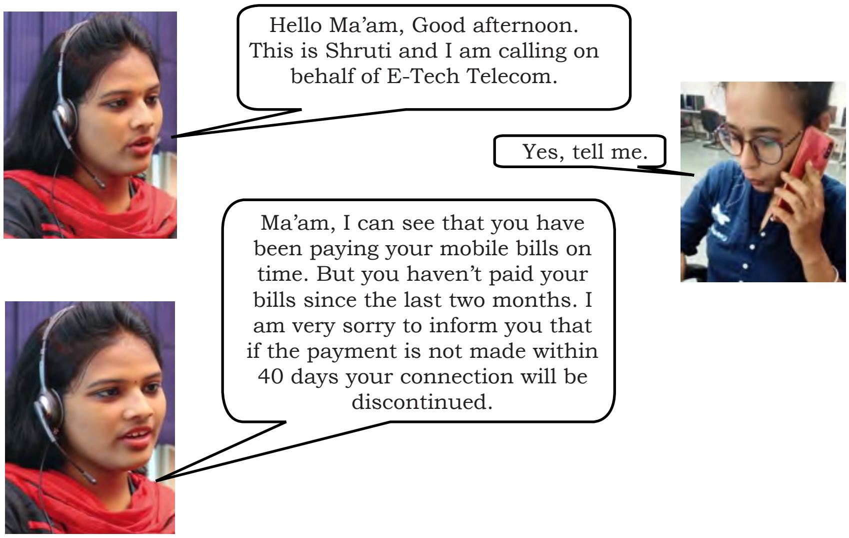
Notes

Giving and Receiving Compliments and Comments

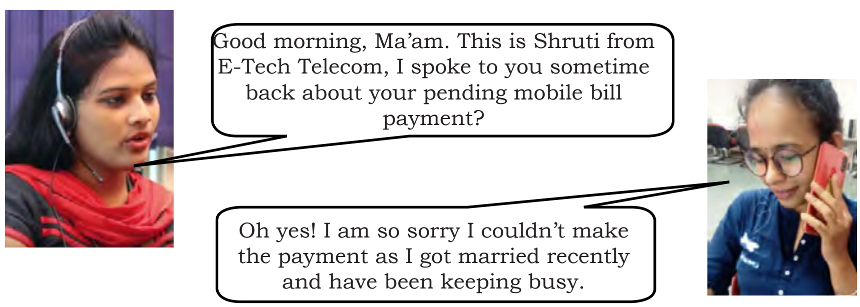
Everyone loves to give and receive compliments. A properly phrased compliment can make a customer, co-worker or a friend feel valued and appreciated. Letting people know that you appreciate them is a great way to make them feel good about themselves and motivate them to succeed in the future. Your compliment must be accurate and sincere to have the best effect.

Let us look at a scenario where a customer is very prompt in paying her mobile phone bills, but misses a couple of payments. So the CSR calls up to check the reason. Although she is a valuable customer her connection will be discontinued if she doesn't make the payment within 40 days.

Scenario 1: Complimenting a customer



The CSR calls up after 40 days



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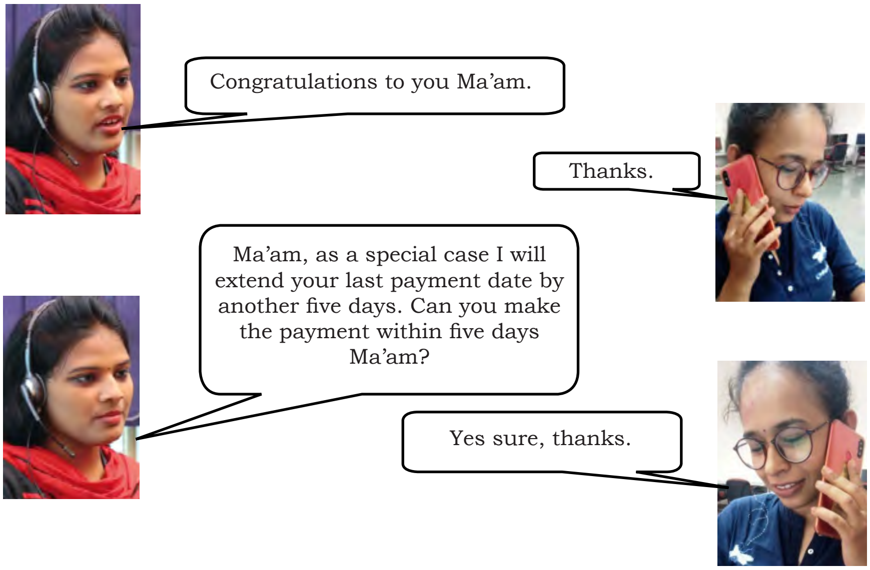

From the above scenario you can see how the CSR complimented the customer. This shows that the CSR is sharing the joy of the customer and wants to make the customer feel special. The CSR informs the customer that her case will be treated as a special one and gives her extra time to make the payment.

The CSR closes the call by complimenting the customer once again.

Scenario 2: Complimenting female colleagues

Be formal. “You are looking good today”, “You are looking nice”, “You look beautiful” are fine as long as you say it formally and confidently. Be sure to keep your tone right and maintain eye contact with the lady. Ask for permission if you have to suggest something personal.

Importance of Complimenting and Commenting

Giving compliments is critical in building relationships and encouraging other people. Compliments are an expression of praise, respect or appreciation. A compliment can be as simple as “You are the best”, “I wouldn't have completed this project without your help”, “You are my true friend” and so on. It is said that compliments increase a person's self-esteem and makes one happy.

When to compliment the customer?

- If a customer is a patron.

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- For good past payment record.
- If a customer shares a good news with you.
- If a customer is polite and good to you.

Tips

- Compliment people sincerely. Do not fake the comment.
- Be specific in your compliments by pointing out specific qualities that you appreciate. For instance, instead of saying "I like your work," try saying, "You manage your time so well and complete your work before time."
- Choose your words carefully while complimenting or commenting. Do not use words like cool, mind-blowing, superb, etc.
- A compliment that works in one situation might not work in another. For example, you could compliment a colleague on her dressing at a company picnic, but not at a meeting of senior managers in front of everyone.
- Respond positively when you receive a compliment. For example, if a person pays you a compliment about your work, do not start complaining about the odd working hours, people's attitude at work, etc.
- While complimenting your immediate boss, be formal yet warm and genuine. Do not come across as someone who is trying to flatter.

Call Flow (Routing)

When customers dial a Call Centre, their calls are transferred to the Interactive Voice Response or the IVR System. The IVR is an automated system that allows a computer to interact with human callers. It uses voice and dual-tone multi-frequency signaling (DTMF) keypad inputs to do so. When a customer dials the number of their choice, the IVR responds with pre-recorded instructions, until it reaches a CSR. If a CSR is available, the call is immediately transferred to them. This is what we call the **Call Flow or Call Routing**

Information Security

It is important that as a CRM, you take all measures for information security. Information security is the practice of protecting information from unauthorised access, use, disclosure, disruption, modification, inspection, recording or destruction. This data could be in an electronic or physical form.

Some rules to bear in mind while handling sensitive data are

- do not reveal a customer's personal and financial information to anyone other than the account holder.
- unauthorised information, written or verbal, cannot be divulged to any customer/competitor/any other person for example photocopy of customer information sheet, etc.
- do not share one customer's information with another customer.

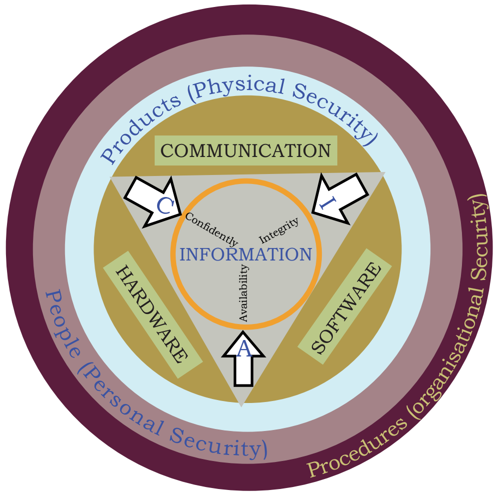


Fig. 3.16: Information Security Parameters

Client Confidentiality

The client places a lot of trust in the organisation and the CRM before sharing their personal information. It is crucial for the CRM to maintain that trust and faith by maintaining absolute confidentiality of the client's information. It is a criminal offence to share this data with any unauthorised person. A culprit can be convicted and imprisoned, if found guilty of this charge.

Data Security

Some ways in which data can be protected are

- data received from the client during processing, in any form, such as hard copies or softcopies, should be destroyed or returned after the completion of work.
- none of the employees are allowed to bring any storage devices like memory cards, CD/DVD/blue ray disc, external hard disk, floppy disk, pen drive, etc., to work.
- at entry and exit points, the security guards frisk the employee to check that none of the storage devices are carried in or out.
- CDs, DVDs, pen drives, disk drives or any other storage devices are not allowed in the individual PCs and in the office premises without prior

Fig. 3.17: Data Security

permission from authorised management and team leaders.

- the professional firewall system restricts the users to surf or access unauthorised sites on the Internet.
- Firewall restricts the rights of all the users within the company. A written Non-Disclosure Agreement (NDA) is obtained at the time of joining from each employee.
- entry into the operations area is restricted by fingerprint software as per the privacy norms and requirements.
- the server for the website is protected too and it is crucial for the CRM to ensure that they do not use, access or try to dig unauthorised information.
- limited access to the network is given through login IDs and password protection.
- passwords and access controls are well-defined for authorised internal persons.

Call Centre Measures

Given below is a list of frequently used terms that are crucial for a CRM.

Fig. 3.18: CSR with Customer

- **Adherence to schedule:** It is a general term that refers to how well a CRM adheres to their schedule. It includes
  - (a) time spent on taking calls during a shift. This includes the time spent in handling calls and in waiting for calls to arrive.
  - (b) the amount of time a CRM was available to take calls.

  Example: 'I had a good day today. I was able to adhere to the schedule well.'
- **Agent:** He or she is a person who handles incoming or outgoing calls. Also called CRM, Telephone Sale/Service Representative (TSR), Representative, Associate, Consultant, Engineer, Operator, Technician, Account Executive, Team Member, Customer Service Professional, Staff Member, Attendant, Specialist, etc.

Example: 'This is the accounts section, Sir. I will connect you to a customer service agent.'

- **Automated Attendant:** At the beginning of the call to a BPO, you hear prompts, such as press one for sales, two for support and so on. The system prompts callers to respond to choices and then coordinates to send callers to specific destinations. This voice processing capability that automates the attendant function is known as an automated attendant.

  Example: 'The automated attendant is being updated to include the new promotion and it will be ready by tomorrow.'

- **Turnaround Time (TAT):** It is the time elapsed between complaint registered and resolved.

  Example: 'The TAT for Ms Sharma's complaint was quite short.

- **Service Level Agreement (SLA):** It is a contract between the main company and the Call Centre. It specifies, usually in measurable terms, what services the Call Centre will provide. There is always a written service level agreement so that services for the customers can be measured and justified.

  Example: A Call Centre, Soft Call, could have the process of Hewlett Packard. HP is the main company and Soft Call is the Call Centre. Then, HP will specify the terms of the SLA.

Some metrics that the SLA may specify include

- What percentage of time the services will be available. For example, six days a week, 18 hours a day, etc.
- The number of users that can be served simultaneously. For example, 350 CRMs can speak with 350 customers at a time.
- Specific performance benchmarks to which actual performance will be periodically compared. For example, seven laptops a month.
- Help desk response time for various types of problems.
- Dial-in access availability.
- Usage statistics provided.

Notes

First Call Resolution (FCR) is a resolution offered in the first call. The best way to increase customer satisfaction and in turn increase profit is to resolve the cursory or complaint in the first call. The customer should not have to call the Call Centre again for the same reason.

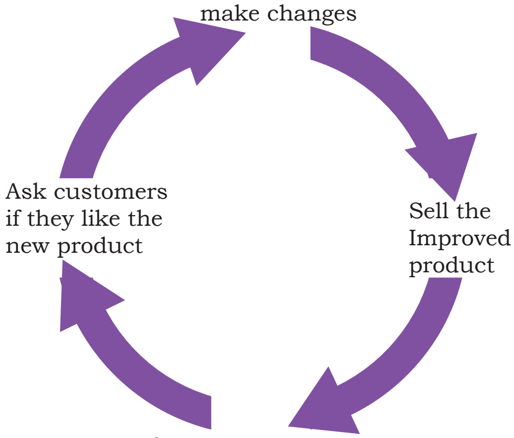


Fig. 3.19: First Call Resolution

Advantages of FCR

- Impacts customer satisfaction
- Helps to avoid repeat calls
- Helps in avoiding escalation

A first level executive must listen attentively to the customer and try to offer the best resolution possible.

Example: 'I was able to provide many FCRs today.'

After-Call Work (ACW) is also called Wrap-up and Post-Call Processing (PCP). It is the work that a CRM must do immediately after an inbound transaction. It often includes entering data, filling out forms and making outbound calls necessary to complete the transaction. While the CRM is doing ACW, they are unavailable to receive another inbound call. ACW is a process of the call but the customer is not online. ACW for a month = Total time spent on ACW/Total number of calls taken.

Example: 'I have to do my ACW properly.'

Support Queue	Sales Queue	Duration
 Pause ACW	 Pause unavailable by ACW	20 sec
 Pause unavailable by ACW	 Pause ACW	20 sec

Fig. 3.20: After-Call Work

Actual Call Handling Time (ACHT) is the actual time spent on a call. It is important to the company for strictly financial reasons. Higher ACHT impacts

business profitability. Hence, it is important to address customer queries in a timely manner. Average of ACHT = Total ACHT of the month/ Total number of calls taken.
Example: 'My team's ACHT today has been very low.'

Average Handling Time (AHT) is the total time taken by CRMs to complete a call. This includes the time taken by a CRM to make a call, disconnect and wrap it up with documentation. It is the sum of the AHT and average ACW for a specified time period.
Example: 'What was the group's AHT today?'

AHT = ACHT+ ACW

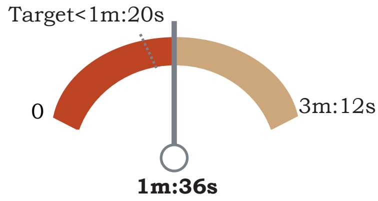


Fig. 3.21: Actual Call Handling Time

Average Hold Time (AHT) indicates the duration for which a CRM has placed the customer on hold.

Stay updated is all about how to make the customer feel happy. Knowledge is not the most important thing anymore for the agent. If you cannot help the customer, the agent can explain why, so that the customer understands. The best method to show the agents this is by getting them to listen to their own conversation along with a coach and just focus on what they could do extra for the customer.

Take ownership and try your best to solve the problem. Look into the issue to find the cause of the problem.

Self-evaluate as this helps to understand not only where you are going wrong but also what you are doing well. Share best practices with colleagues.

Anticipate questions and provide the information before a customer can ask.

Avoid 'over service' strictly answer the main question. Resolve questions from a customer's perspective. Ask the customer what solution they want and listen to them carefully without any restrictions.

Don't interrupt the caller, instead listen to the caller. Allow the caller to say what they need without interruption, then recap and check understanding, addressing one query at a time. This is especially important if the customer is agitated or unhappy with the previous service interaction.

Avoid 'cold transfers' to other departments, or at least send the call through the client data to avoid repeating the same questions all over again.

Notes

Follow workflows through the call when dealing with various call types. This helps reduce the AHT and also reduces repeat calls and increases first-time resolution.

Organise the knowledge-base alphabetically, like emails and notes to make things easy to find.

Cut down on the aggressive attitude and stay positive, smile while talking and cut down the aggressive attitude if it is an objection-handling call.

External Customers

An external customer uses your company's products or services but is not part of your organisation. For example, if you own a retail store, an external customer is an individual who enters your store and buys merchandise.

External customers are essential to the success of any business, as they provide the revenue stream through their purchases that the enterprise needs to survive. Satisfied external customers often make repeat purchases as well as refer your business to other people they know. A customer who suffers a negative experience in business, such as being treated rudely by an employee, can also hinder a business by dissuading others from patronising it.

Let us now understand our customers a little better.

All customers who call for a service or help are external customers. They are not part of your Call Centre. They are external to the system and hence the name.

The well off, the not so very well off, males, females, young, elderly, soft spoken, irate, confused—any of these could become your external customer if they have called you at your Call Centre! As a CSR, it is your duty to service them equally.

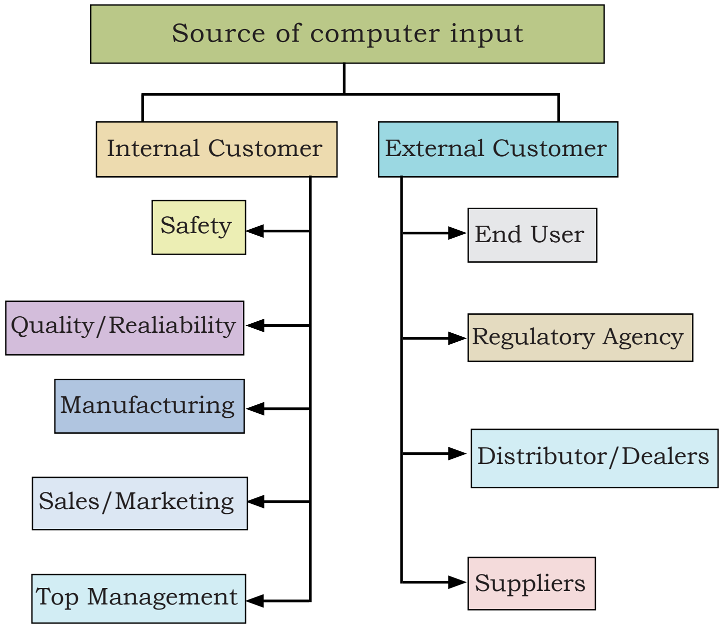


Fig. 3.22: Internal and External customer

Internal Customers

They are within your system. For example, your Team Leaders are your internal customers because they give you the orders that you must execute. Besides, your peers too could become your internal customers, when they seek your help!

Customer Expectations

Customer expectations are beliefs about a product or service. For instance, when customers buy a product or service they already have a specific set of expectations. These expectations are based on their perceptions about the product or service, the company and the industry. These expectations are formed through past experience and the experience of others with whom the customer interacts. So, knowing customer expectations is the first and possibly the most critical step in delivering good quality service. Being incorrect about what customers expect can mean losing a customer.

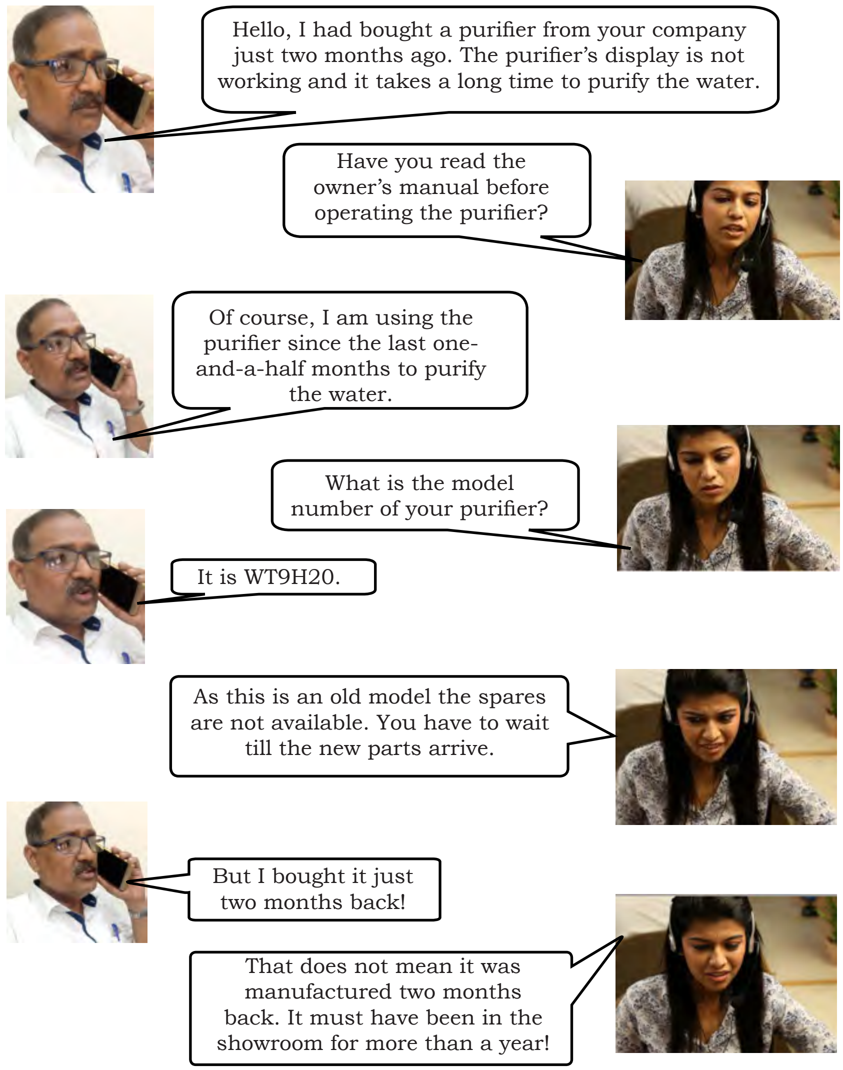
Fig. 3.23: Customer Expectation

In simple words customer expectations are the customer's wants and needs. This is usually expressed in terms of value of product and its features including customer service and after sales service. As a CSR, you must meet or exceed customer expectations to achieve customer satisfaction. When you buy an mp3 player, you expect it to play mp3 music. Similarly, if you buy an insurance policy, your expectation from the policy is protection for you and your family from unforeseen circumstances. In simple words, every customer buys a product or service as they have some expectations from it.

Notes

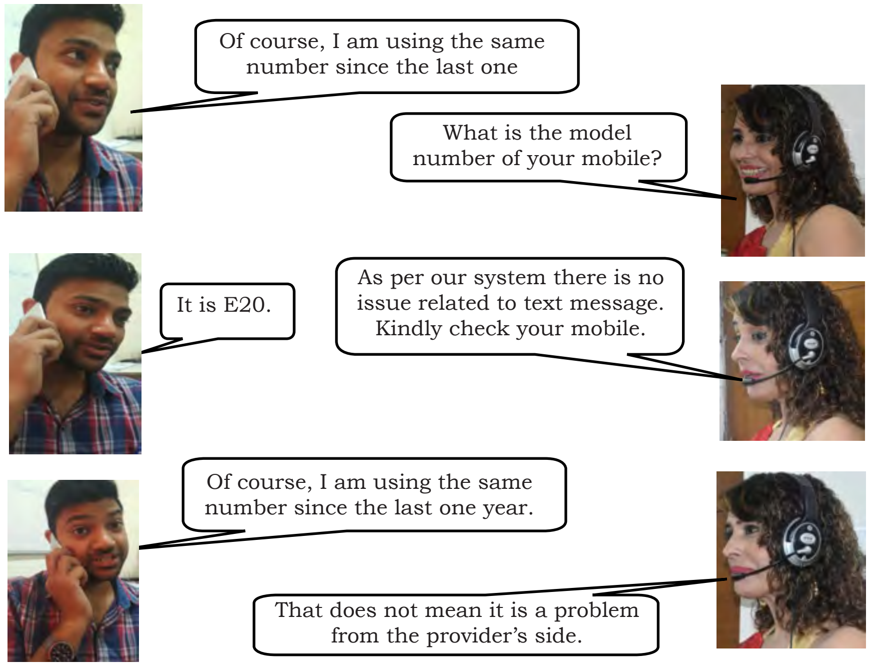
As a CSR you must be smart enough to identify what a customer expects. Read through the scenario to understand better.

Scenario 1



The customer feels cheated and cuts the phone line.

Scenario 2



From the two scenarios you can see that a customer expects

- true and accurate information about the products that they buy.
- the product to perform the way it is supposed to within its warranty period.
- good after sales service that alleviates their trust in the company.
- the CSR to provide solutions for their problems rather than complicating them.
- to be treated fairly and given genuine reasons for any inconvenience caused to them.
- the company to cooperate with them to understand their problems.
- timely service.
- quality products.
- the CSR to have a helpful attitude.

MEET THE CUSTOMER'S EXPECTATIONS

When customers get what they expect, they're satisfied. The quality of your customer service is almost wholly determined by your ability to meet your customer's expectations. Let us see some techniques to meet the customer's expectations effectively.

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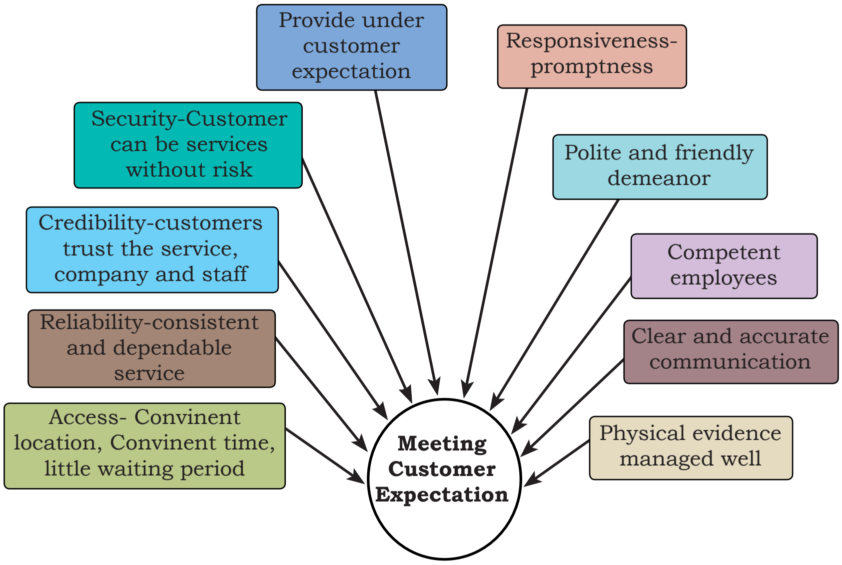


Fig. 3.24: Meet the Customer Expectations

- **Promptness:** We live in an era of impatience. Customers do not want to wait for service. Even a short wait will discourage customers in most situations.
- **Professionalism:** Customers want a CSR who is knowledgeable about products and services, skilled at dealing with people and responsible in performing duties. Customers want to deal with a professional CSR.
- **Accuracy:** Customers expect the CSR to get information and take orders correctly, the very first time. They do not want to deal with mistakes or correct the CSR's errors.
- **Friendliness:** Customers expect to be treated respectfully and politely. Customers want to be liked and treated in a friendly manner.
- **Honesty:** Customers want honest, straight forward information and responses. Most customers appreciate a CSR that will admit mistakes and work to correct them. A customer that believes he or she has been misled will stop doing business with the company and register a complaint.

  Honesty also includes follow-up on promises. Broken promises anger customers. Customers expect to be informed if a promise cannot be fulfilled as stated.
- **Empathy:** Customers expect understanding. They want a CSR who is willing to see their side

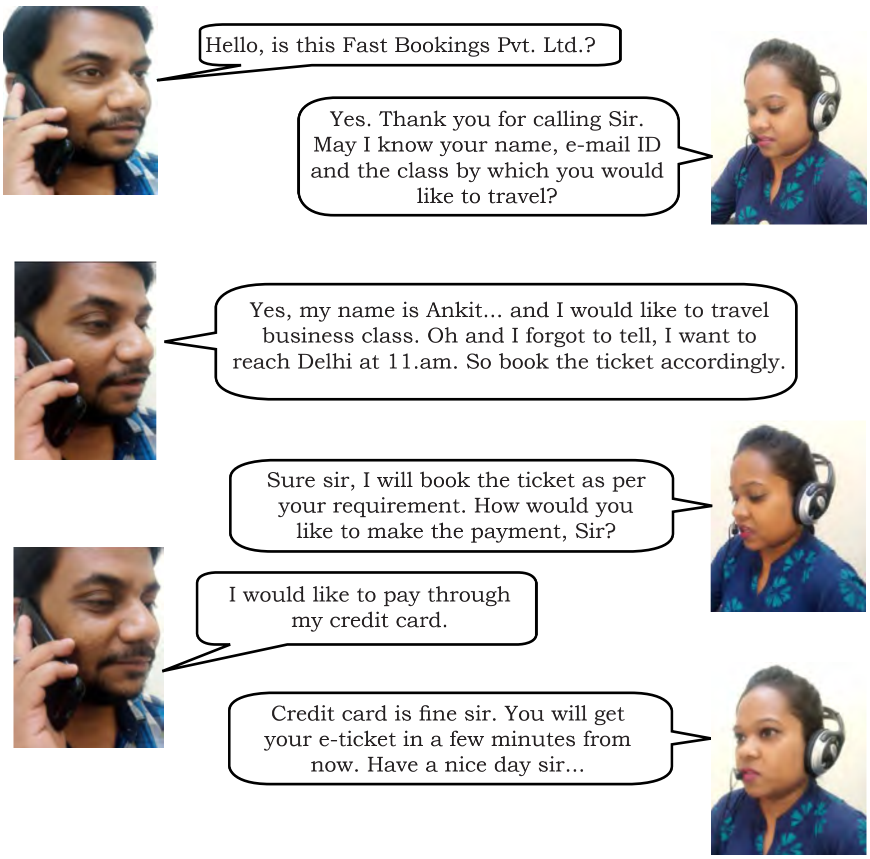
of a situation, especially when there is a problem. They want a CSR who will listen to them.

In short customers expect fast, friendly, and accurate service to be provided.

Tips

- Ask questions to measure the customer's expectations.
- Give clear and complete information about the product or service.
- If asked, inform the customer about the limitations of the product.
- Answer all the queries of the customer.
- If possible, try to address all the expectations of the customer.

Customer Service



What did you observe in this scenario?
The CSR

- greeted the customer,
- noted down the details,

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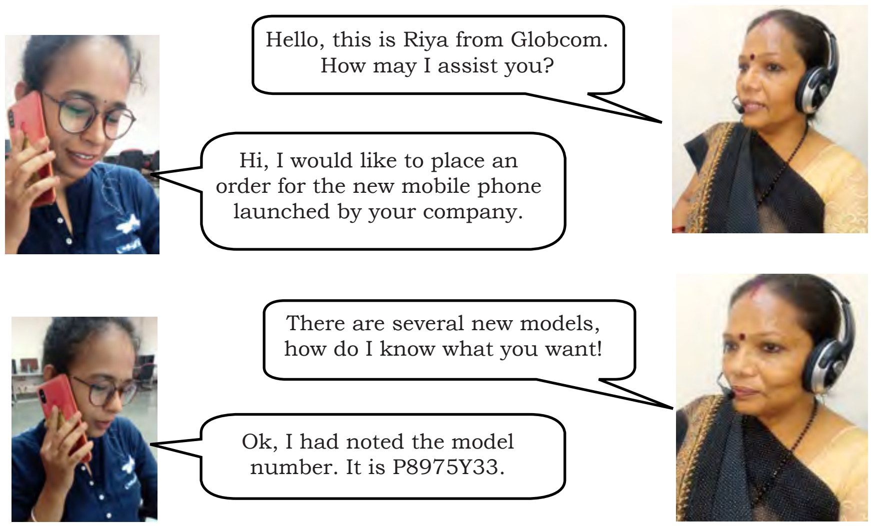
- gave prompt response, and
- provided quick service.

Service is an act of assistance provided to others. In this case, it means the interaction with the customer. How efficiently you provide the service to the customer, will decide how good your services are.



Customer disconnects the call....
What did you notice in the call?
The CSR

- used inappropriate tone,
- was not willing to help,
- argued with the customer and
- showed bad attitude.

Great customer service is very important for the company as well as the CSR.

- A satisfied customer will become a repeat customer.
- One satisfied customer will bring in 10 other customers.
- The company's reputation will grow and so will yours.
- Great customer service indirectly reflects your good work.
- You will gain appreciation from both the customers as well as your seniors.

Provide Great Customer Service

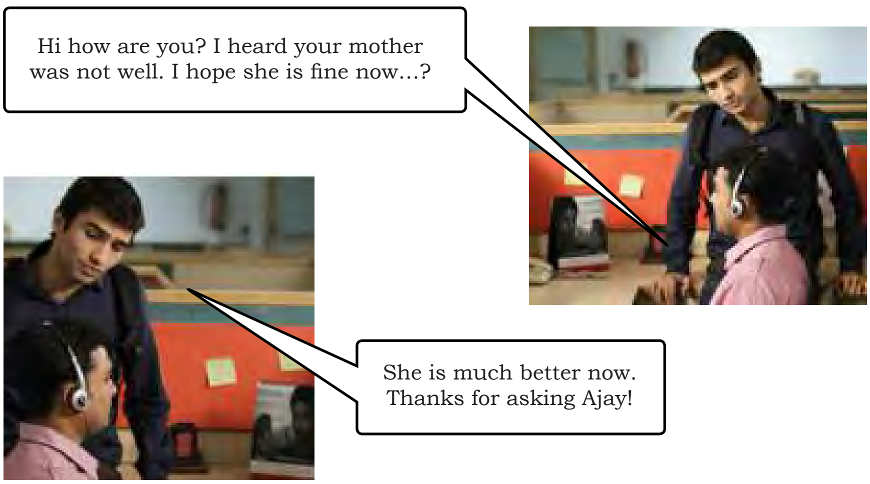
You have to succeed in your job. You have to know how to give great customer service. Here is how:

- Answer the call and do not keep the customer waiting.
- Do not make false promises to the customer, unless you can keep them.
- Take that extra step to help the customer.
- Do not confuse the customer with technical jargons.
- Put yourself in the shoes of the customer to understand the situation.

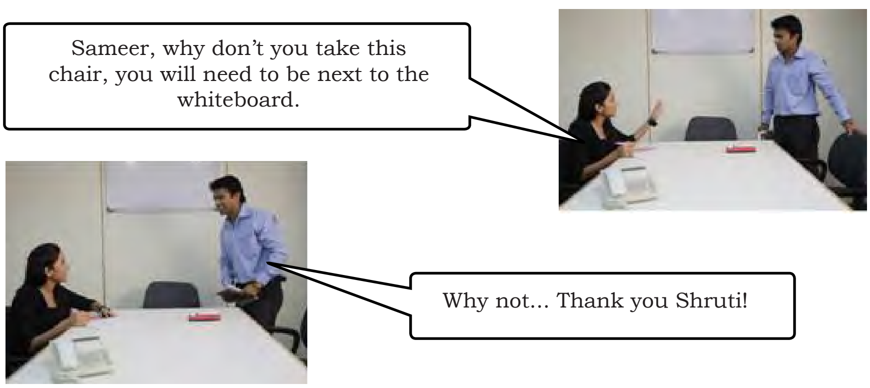
General Courtesies

We are going to see some general instances of courteous, that is polite behaviour.

Scenario 1



Scenario 2



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We just saw some instances of kind people. What they had in common, was courtesy and consideration for others. We are a part of the service industry and courtesy in our speech is the most important part of our role.

Courtesies while Opening a Call

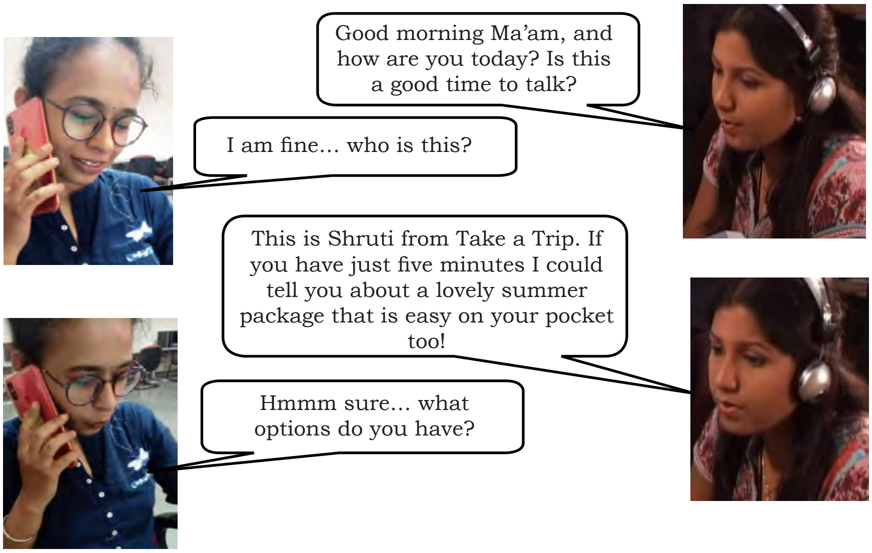
How you handle a call makes all the difference. A warm, helpful, professional and friendly voice on the phone will help build the customer base. Here are a few scenarios that will give you an idea on how to follow courtesies while opening a call.

Scenario 1

The customer gets angry and she hangs up the phone because the CSR was being too casual and familiar. She began talking about the service without the customer's permission.

Now let us look at how Shruti handles the same call.

Scenario 2



We will now look at each point of courtesy that won Shruti a customer today.

“*Good morning Ma'am. How are you today?*”

Wishing the customer and showing genuine interest in her.

“*Is this a good time to talk?*”

Being considerate of the customer’s convenience.

“*If you have just five minutes...*”

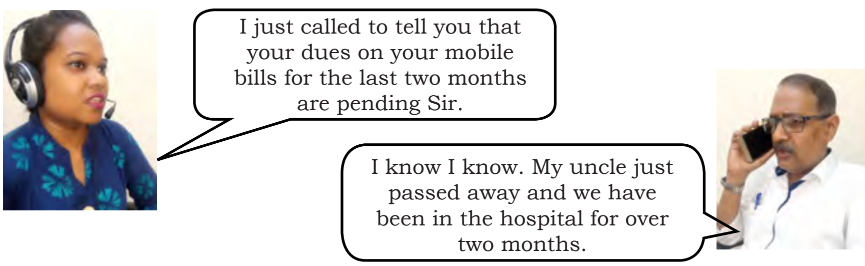
Double-checking so that the customer does not feel rushed.

These are some courtesies that you may observe while opening a call with your customer.

Courtesies during a Call

We have seen some courtesies that you need to follow while opening a call. These courtesies must continue throughout the conversation. Here are two instances that will help you understand this well.

Scenario 1



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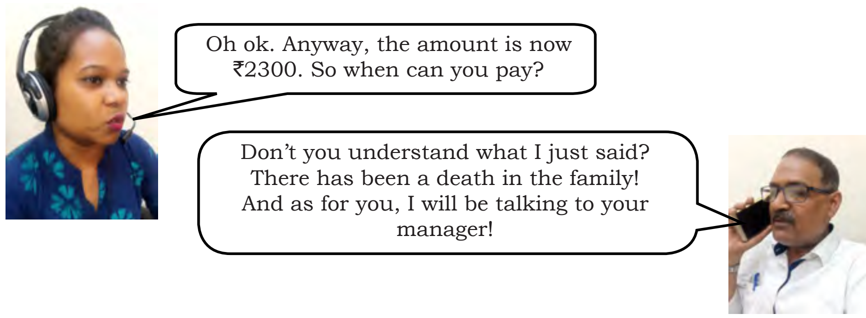
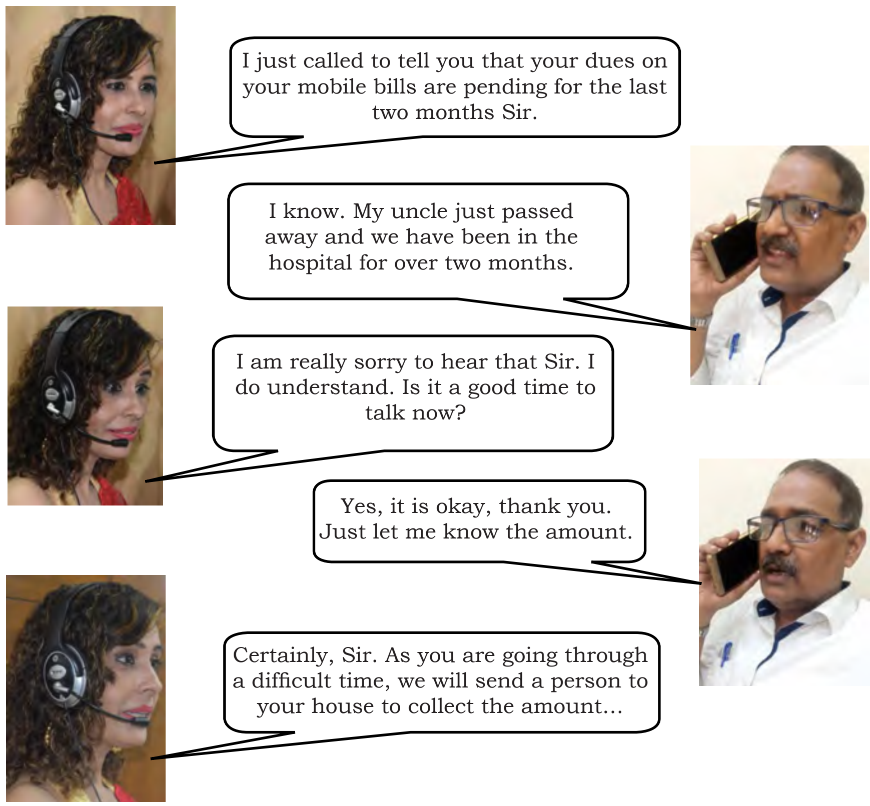


The situation above was a sensitive one. The customer got angry with the CSR because she did not show any consideration for the customer's situation.
Let us see how Riya, another CSR, handles the same call.

Scenario 2



We will now look at each point of courtesy that won Riya a customer today.
"*I am really sorry to hear that, Sir. I do understand. Is it a good time to talk now?*"
Riya expresses genuine sympathy. Double-checks if it is a good time to talk.

"*Certainly, Sir. ... As you are in a difficult time, we will send a person to your house to collect the amount.*"

Riya speaks in a helpful tone. She also offers additional help to show consideration.

Those were some tips on courtesies you may observe during a call.

Telephone Etiquette

Take the call as soon as you hear the beep. Do not keep the caller waiting. If the customer disconnects before you take the call, then it will become an abandoned call.

Open the call by greeting the customer. Identify yourself – your name, the name of your company and the relevant department you are from.

For example,

"*Good morning, thank you for calling Do-well Publications. This is Sanaya from Customer Service. How may I help you?*"

Behaviour while on a Call

Open the call by greeting the customer. Identify yourself – your name, the name of your company and the relevant department you are from.

For example,

"*Yes Sir. I have just checked. We can dispatch all the copies that you need. It will take three to five working days. Is that ok with you, Sir?*"

Always take permission from the customer before putting him or her on hold.

For example,

"*About the discounts... well, Sir I need to check with my Supervisor. May I put you on hold for a minute while I check? Thank you, Sir.*"

If you need to put the customer on hold for longer, come back on line to inform him or her about it. Never leave dead air.

For example,

"*Sir, I am sorry to keep you waiting. My Superior is checking, he's likely to take another minute. I request you to stay online. Thank you, Sir.*"

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If you must sneeze, cough or do something that you would NOT want your customer to hear, use the MUTE button to do so.

Before closing the call, thank the customer. Let the caller hang up first.

For example,

"*Sure Sir, anytime! Thank you for calling customer service. Have a nice day Sir.*"

Don'ts of Telephone Etiquette

Read carefully what you must NOT do while taking inbound or making outbound calls.

- Do not leave the phone unanswered. There is a danger of losing the call.
- Do not eat, drink or chew when on a call.
- Do not shout or laugh loudly when talking to the customer over the phone.
- Do not hurry the customer into finishing the call.
- Do not breathe heavily over the mouthpiece as the microphone picks up even the slightest of sounds and your heavy breathing will be heard by the customer.
- Do not use technical jargons or slangs.
- Do not argue with the customer even if they are wrong. Put your point across using the correct tone and language.
- Do not ever lose your temper, how so ever difficult, the situation may get.
- Do not give false information to the customer.
- Do not discuss personal matters on a call.

Dos of Telephone Etiquette

You should strictly follow these dos while on call with the customer.

- Always ask the customer, before putting them on hold.
- Use the mute button if you must cough or sneeze.
- Listen carefully to what the customer is saying. Do not interrupt.
- Speak clearly and slowly without rushing.

- Be patient.
- Be polite.
- Do not be forceful or aggressive while making outbound calls.

The First Call

Mrs Sharma: *That's not a bad idea, I do need one right now. Can you call me in the evening at 6 o'clock please?*

Shruti: *Sure Ma'am, I will call you exactly at 6 o'clock in the evening. Thank you for your time and please look forward to a wonderful offer today!*

Shruti made some critical correct moves that made her customer interested in what she had to say. So let us look at the techniques used by Shruti.

1. "*Good morning, Mrs Sharma*"

Greet the customer. Whenever possible, begin by taking the customer's name, it makes the customer feel special.

2. "*Is this a good time to talk?*"

The customer may be busy with something. So always ask for permission to speak.

3. "*I just want to congratulate you as you have won a great offer... a huge 25% discount.*"

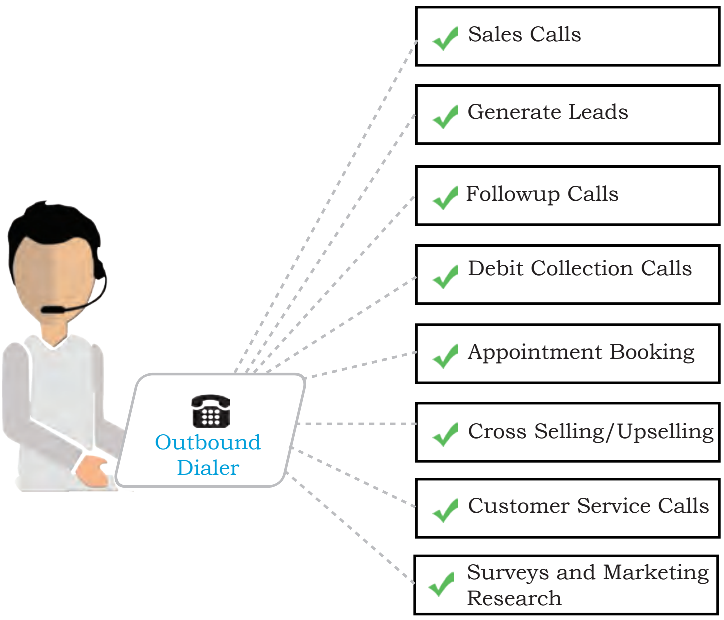

Fig. 3.25 Types of call

Generate interest in the customer for your product. See if you can begin by congratulating the customer or say something that will arouse their curiosity.

4. Leave the customer with something to think about.

If you have mentioned a discount, then the customer should think about it.

5. "*Thank you for your time and look forward to a wonderful offer today*".

Thank the customer, whatever the outcome of the call.

QUALITIES TO BE DEVELOPED TO MAKE A TELE-SALE CALL

- Ability to cut ice
- Politeness

So with your first call, you must develop the skill to cut ice with the customer and be polite at all times.

Tip

- Always try to sound warm and friendly, positive, professional, helpful polite and courteous.

The Follow-up Call

Out of sight is out of mind! So it is important to follow-up with your customer. Keep reminding the customer about your offer or product or service.

Let us see how Shruti follows up on her call

Shruti: *"Good evening, Ma'am. This is Shruti again from STAR Electro. I hope you are free to talk now? "*

Mrs Sharma: *"Hi Shruti, tell me. What is the offer? "*

Shruti: *Ma'am, our company is celebrating its 25th anniversary by giving our special customers some great offers on washing machines. If you can come to our showroom, we can show you the models on which offers are available."*

Mrs Sharma: *"I am not sure if I should get a new machine now. I already have a semi-automatic one."*

Shruti: *"If I may say so, getting an automatic one will make your life much easier. You must be so busy with office and house work and this is a once in a lifetime anniversary offer, Ma'am."*

Mrs Sharma: *"Okay, I think I will drop in and take a look."*

Shruti: *"That's great, Ma'am. I will tell he sales staff to expect you. You know our address, don't you? It is 115 Kolar Road. You could also call for more enquiries*

Notes

at 1800044334466. Should I repeat that... okay great. We hope to show you some great washing machine models tomorrow. Thank you so much, Ma'am."

Shruti called her customer for the second time

- To tell her about the discount offer.
- To convey to her the benefits of the product.
- To invite her to the showroom.
- To persuade her to avail the offer.

1. Influence the customer to walk into a showroom, if possible. It is halfway to making a sale.

"*If you can come to our showroom any time.*"

2. Make a suggestion to the customer. Match your product to the customer's lifestyle – the greatest sales trick.

"*If I may say so, getting an automatic one will make your life much easier. You must be so busy.*"

3. Work out the sales proposition according to the situation, that is, the reason WHY the customer should buy your product. In other words, answer the question that is in the customer's mind – "What's in it for me?"

4. Let the customer feel that the offer is a limited and special one.

"This is a once in a lifetime anniversary offer, Ma'am."

In short, Shruti showed all the qualities that go to make an excellent telesales caller:

- Great salesmanship
- Persuasion
- Politeness at all times.

After generating a sales lead, you must effectively follow up on it. While this may seem straightforward, there are many variables involved in the process that will determine whether a sales lead converts or slips through your fingers. By implementing five of the correct follow-up techniques, you should maximise your conversion rate and increase your overall sales volume.

Notes

Follow up on Every Lead

You never really know the potential of a lead unless you take the proper steps to follow up. In some cases, a weak-looking lead could result in big sales, while a strong one could result in nothing. That's why you should treat every lead as if it could bring in sales and even become a long-term customer. Following up on leads is usually a numbers game. The more effort you put in the higher your sales figures.

Have a Specific Game Plan

Nurturing each lead to the fullest and properly executing your follow-ups is important. Your exact game plan will depend upon several factors, like how many leads you have on an average, your number of employees, etc. If your business sells different types of products, you might want to dedicate sales representatives to follow up on leads that fall into specific product categories. Each representative should be fully familiarised with the products within his assigned category and capable of answering nearly any question. You would then want to follow suit with other employees to adequately cover all leads. When dealing with numerous leads on a consistent basis, you may even want to have an employee who is solely responsible for re-contacting leads who showed interest, but were not ready to make a purchase right away.

Have a Sense of Urgency

Another part of maximising your conversion rate involves responding to each sales lead as quickly as possible. According to the Harvard Business Review, businesses that respond to inquiries within an hour are seven times more likely to qualify a lead than businesses that wait longer than an hour. After 24 hours have passed, the likelihood of making a conversion drops drastically.

Establish Rapport and Trust

After making contact, it should be your prerogative to win over each lead. Because many will be initially skeptical, you need to be equipped to gain their trust.

This can usually be done in a few ways. First, you need to have a deep knowledge of your products and/or services and be able to answer questions. This conveys a sense of professionalism and serves as a positive reflection of your business. Next, you should be as courteous and friendly as possible. Nothing will turn off a lead quicker than being impolite or disrespectful. Finally, you should take each lead's specific needs into consideration. If someone has unique circumstances, you should be willing to work to accommodate them.

Keep your Promises

Hold up to your end of the bargain when following up on leads. If you said that you would e-mail someone a free trial download or informational pamphlet, do it promptly. Not keeping your promises can be extremely detrimental to your entire campaign and give your business a bad name. It's ideal to 'under promise and over deliver'. This means that you should strive to exceed your lead's expectations.

Getting the most from your leads requires consistent professionalism. Taking the time to reach out to every lead is a great way to start. Having an efficient system in place for handling each lead should streamline the process while maximising conversions. Responding quickly can help you capitalise on hot leads. Also, connecting with each sales lead on a personal level and delivering on promises can help position your business for success.

Challenges during a Telesales Call

Teleselling is not as easy as it seems. A telesales caller has to be tough and sensitive at the same time! Take a look at these snippets of various customers.

Fig. 3.26: Irritable customer

- **Irritable customer:** You are likely to meet rude and irritable customers.

  Solution: Do not take it personally; they are not being rude to you.
- **Customers who reject calls:** Most customers are likely to reject your call repeatedly.

  Solution: Have patience. Remind yourself that 10

Fig. 3.27: Customers who reject calls

rejections will lead to one sale, which will add up to success.

- **Customers who do not want your product or service:** Most customers are likely to say that your product or service is not required.

  Solution: Find out how your product or service can fit into the lifestyle of the customer by empathising, or understanding, your customer.

Always remember — the customer thinks — what's in it for me? So your product MUST have an answer to that question.

In general, while making a telesales call, follow these:

- Generate interest in the customer about the product or service.
- Ensure it is a good time to talk or ask for a better time.
- Give the customer something to look forward to after your call.

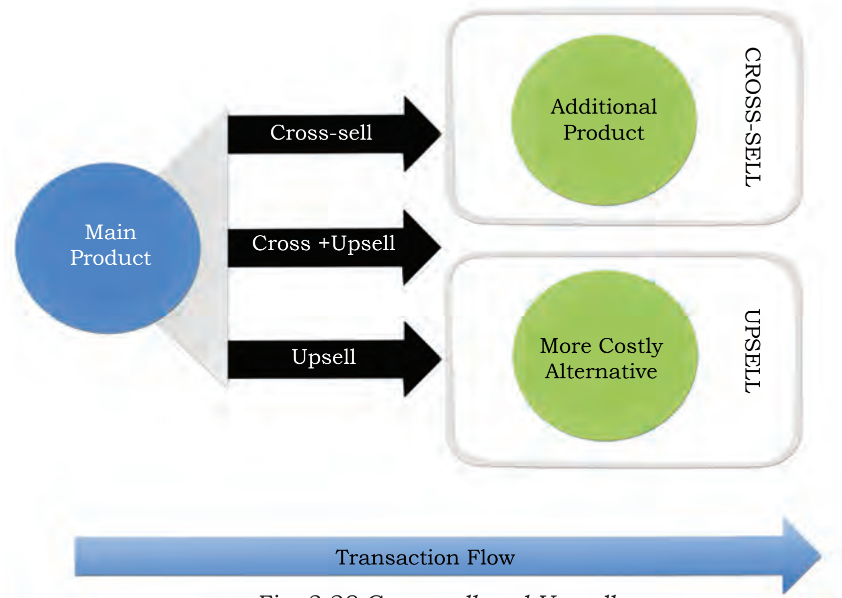

Fig. 3.28 Cross-sell and Up-sell

Upsell or Cross-sell

While making telesales you can also implement upselling and cross-selling techniques. These techniques can make a big difference to your bottom line. Upselling and cross-selling allow you to generate extra sales revenue by encouraging your existing customer base to purchase more, or to make more frequent purchases.

Upselling

An up-sell occurs when you offer an upgrade or addition to the deal when a customer is ready to order a product or has already made a purchase from you.

Let's suppose that an existing customer of a telecom service calls to report a lost or stolen phone. In such a case, we will first help the customer in blocking the lost phone and then offer them to take an insurance on the phone so that if it is ever lost again it will be covered.

Cross-selling

Cross-selling is a strategy that businesses can use to encourage existing customers to purchase additional or complimentary products from your range. This can prove to be particularly effective in business-to-business selling where the buyer and seller relationship is well established.

Let's suppose that the customer is calling a telecom company for a billing dispute and is not happy with the charges of Multimedia Messaging Service (MMS), which is let's suppose ₹5 per MMS. Offer them a bundle of Short Message Service (SMS), which is, let's suppose 50 SMS for just ₹100. This is called cross-selling of bundles and leading to solutions.

Let's take a look at a successful example of cross-selling.

Sanya: "*Thank you for calling Sky TV! My name is Sanya, how may I help you?*"

Caller: "*I am calling to pay my digital TV bill.*"

Sanya: "*Ok, sure, can I take your account number?*"

Caller: "*Yes! It's 123….*"

Sanya: "*Thank you, what is your name please?*"

Caller: "*My name is Ravi.*"

Sanya: "*Can I take your bank details?*"

Caller: "*Yes it's* ________________"

Sanya: "*Thank you, I have taken the payment.*"

Caller: "*Thank you.*"

Sanya: "*I would like to tell you that we have started a new service, where you can watch any five movies of your choice in a month only at ₹50 per month. Would you be interested in trying it? I'll give you free service for 15 days.*"

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Caller: “*Oh okay, what all movies can I watch*”

Sanya: “*We have a collection of 20K movies both Hollywood and Bollywood. You can select the movie online and we will play it for you as per the request.*”

Caller: “*Oh! That’s wonderful.* ”

Sanya: “*Go to this web address: skytv.com* ”

Caller: “*Okay please add this service.*”

Sanya: “*Sounds great, I have taken the request, let me tell you that you have taken a good decision. Is there anything else I may help you with?*

Caller: “*No. Thank you.*”

Sanya: “*Okay, Have a nice day. Bye*”

Tips

Here, we’ve put together some simple tips to avoid common mistakes while cross-selling and up-selling to your customers:

- Products and services recommended through upselling and cross-selling must be relevant to the customer’s needs. So, listen for cues and respond appropriately.
- To upsell or cross-sell successfully, you must be able to demonstrate the maximum value to the customer.
- Pay close attention to timing and context. Delay or skip cross-selling or upselling if the customer is frustrated or is calling to complain.
- Do not inappropriately pressurise customers to buy your products or services.

Customer’s Sales Record

Remember, equipment used to make or receive calls will be directly connected with live calls and will remotely record all conversations that take place with the customer.

As a CSR you will be trained and provided the tools to ‘tag’ the calls. Tagging means there can be different products for sale and there can be different reasons for the sale completed or rejected. Once the call is over, the advisor fills in an internal call survey, which will have all the details, such as what was the purpose, whether or not the call got converted into a sale, if yes, then for which product and the mode of payment, if not then the reason for the call not getting converted into a sale. If the call gets converted into a sale then the CSR's actions will be to send the product to the customer and share online details of the product and terms and conditions with the customer. Once the internal survey is placed by the CSR, then the quality team or the supervisor can pick the call from the automated recording tools and analyse the same.

Notes

Confused Customer

A customer enters an electronic shop looking at various models of mobiles. A salesperson offers help.

Salesperson: *"Can I help you, Sir?*

Customer: *"Yes, I wanted to buy a mobile phone... uh ... hey these laptops look good! Please show me a good laptop.... And are these iPads? "*

Salesperson: *"Yes Sir. Let me show you some of the iPad models."*

Customer: *"uh... okay.... Let me just take a look at the other products in the store. I'll come back to you later! Thanks. (Leaves the store) "*

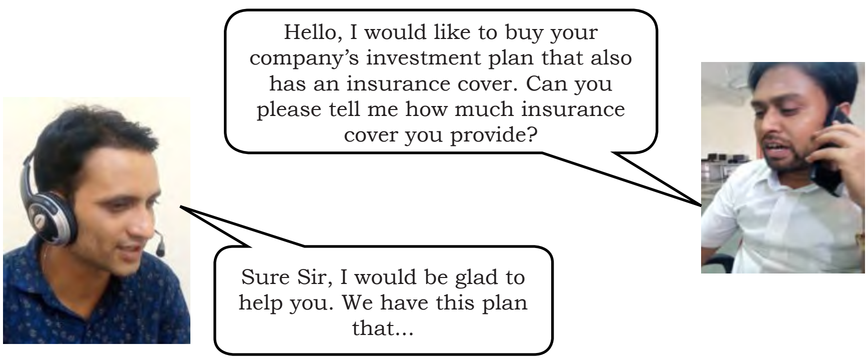
It is clear that the customer had no specific need or requirement. The customer was casually asking about different models of mobile phones, laptops and iPads. The customer could not seem to decide what to buy or whether to buy.

Characteristics of a Confused Customer

Here are two scenarios to help you understand who a confused or wandering customer is.

Scenario 1

A customer calls up to inquire about a new investment scheme.



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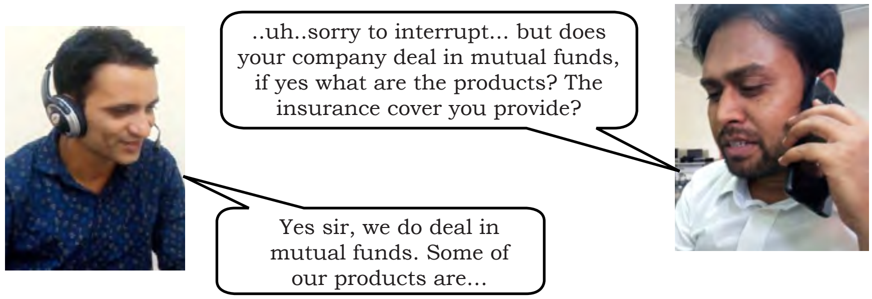
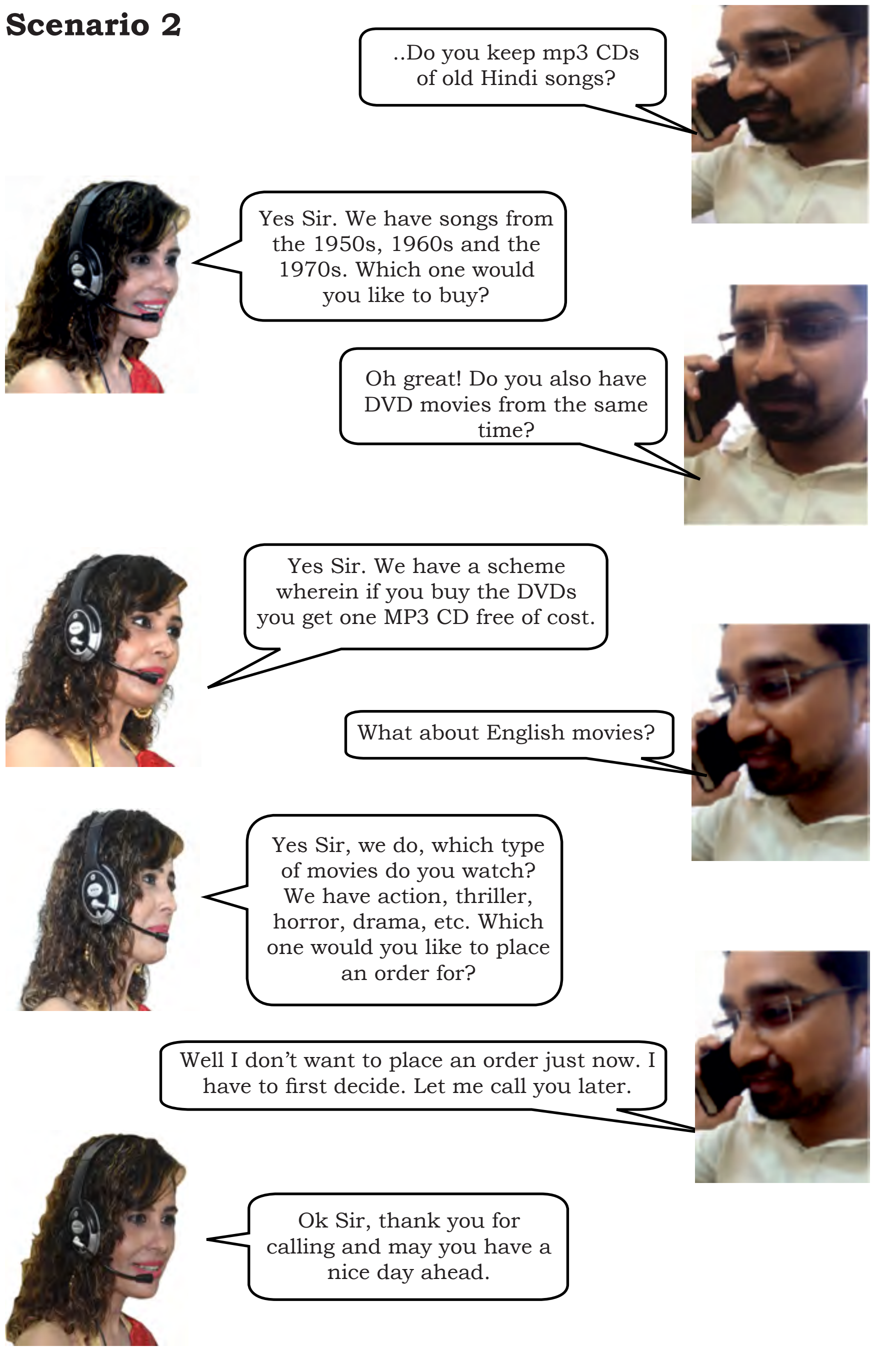


Scenario 2



A confused customer, whether in a shop or over the phone, has these characteristics:

- has no specific need,
- is curious about the features of the product or service,
- is not sure of what they want to buy,
- shows little interest in buying and
- asks a lot of questions about the product without any intention of buying.

Handling a Confused Customer

Here are some steps to handle confused customers.

Step 1: Guide the customer gently to the main offer, if there is any, on the products.

Step 2: Probe to find out the needs of the customer.

The questions to be asked are as follows:

- Which one would you require?
- What is the size of your washing load?
- How often would you use it?
- When do you want delivery?

Step 3: Put forth options for the customer to choose from.

Step 4: Recommend/suggest/advice the customer. However, do not push the suggestion.

For this, you must possess excellent knowledge of your product and competitor's products.

You can say:

- I would recommend…
- May I suggest…
- This may suit your requirement…
- Would you like to try out…

Step 5: Be solution oriented. See how you can help the customer decide.

Step 6: Give the customer time when needed. Make sure the customer feels welcome to call back with any query.

You can say:

- You can call us at this number any time for any help.
- We will be happy to provide you more information.

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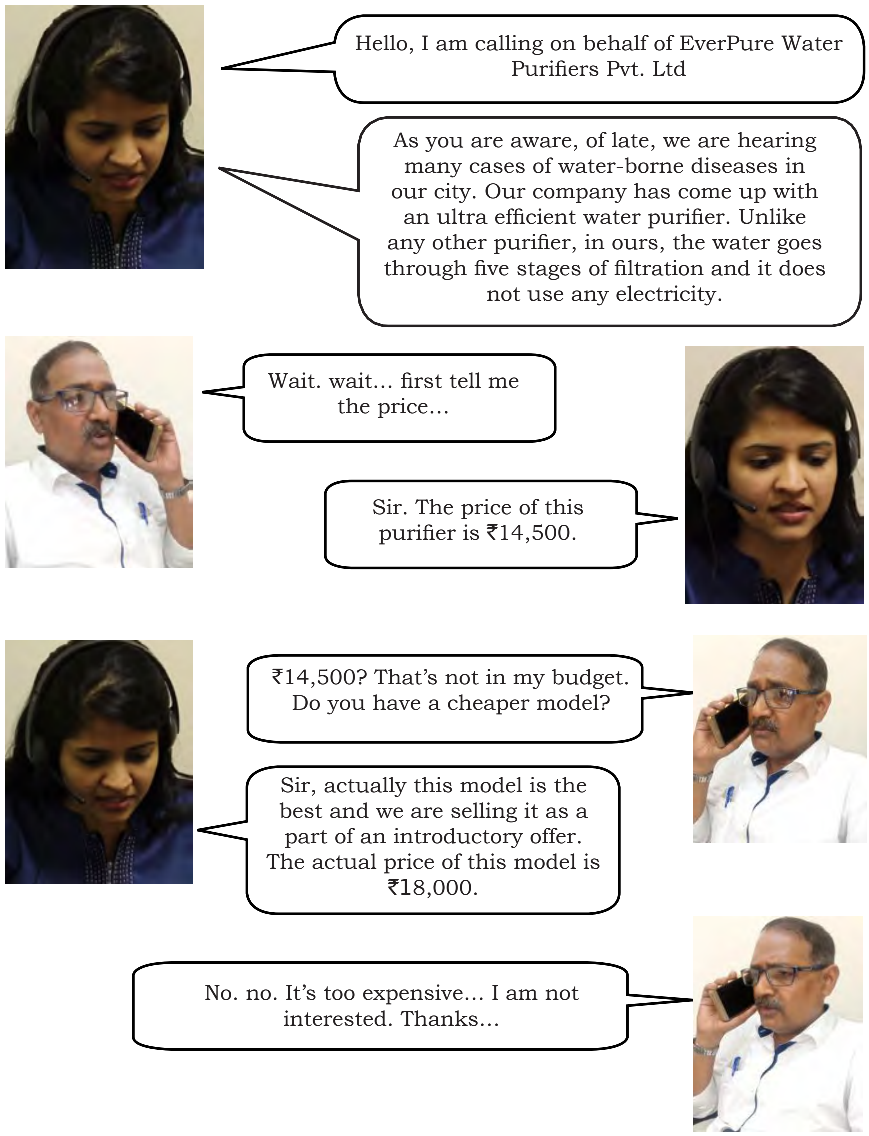
Cost-Conscious Customer

Scenario 1

Shruti, a CSR, calls up a customer to sell a water purifier. She tries her best to sell the product, but fails.



COLLECTION CALL

If a customer does not make the payment on or before the due date, you will have to give the customer a reminder call. Such calls are known as collection calls. These calls are outbound calls.

Collection calls are of four types.

(a) Information Call

(b) Soft Collection Call

(c) Hard Collection Call

(d) Complaint Handling Call

Let us see an example of a regular collection call. Ajay, a CSR calls up Mr Kumar, a customer.

Ajay: *"Good morning, Sir, this is Ajay calling on behalf of ABC Financial. Am I speaking to Mr Kumar? "*

Mr Kumar: "*Yes, this is Mr Kumar.*"

Ajay: *"Sir, this is to tell you that the last date for payment of EMI for your housing loan has passed!"*

Mr Kumar: "*Oh is it? I completely forgot.*"

Ajay: *"Sir, now you will have to pay the EMI along with a penalty of ₹1000. I would request you to pay the EMI latest by tomorrow."*

Mr Kumar: *"Yes, sure I will do that by the end of the day."*

That was a good example of a collection call. Here are some guidelines that you need to follow during a collection call.

Some dos to be followed during a collection call:

- Always keep your pitch low.
- Maintain a polite and calm tone, however, difficult the customer may get.
- Be responsive and prompt.
- Have good knowledge of the product that you are selling.

Things that you should not do while talking to a customer:

- Never raise your voice while talking to a customer.
- Do not use words that could insult the customer.
- Do not give false information to the customer.

Information Call

Read the conversation given below between Ajay, the CSR and a customer.

Customer: *"Hello."*

Ajay: *"Good morning, Sir, I am Ajay calling on behalf of ABC Bank. Am I speaking to Mr Akshay?"*

Akshay: *"Yes."*

Ajay: *"Sir, this call pertains to your car loan account number ending with 207899.*

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Sir, this is to inform you that your payment for the current month is due on 16 February. I request you to pay the same on time to avoid any extra charges.”

Akshay: *“Thanks for the information; I will do the needful at the earliest.”*

Ajay: *“Thanks a lot, Sir. Have a nice day.”*

In this call, Ajay speaks to the customer to give information on his current month's payment. Such a call is referred to as an **information call.**

Soft Collection Call

Now, look at this scenario in which the customer misses the payment for the current month and receives a call from Ajay, the CSR.

Customer: “*Hello.*”

Ajay: *“Good morning, Sir, I am Ajay calling on behalf of ABC Bank. Am I speaking to Mr Rohit? ”*

Rohit: *“Yes.”*

Ajay: *“Sir, this call pertains to your credit card number ending with 5289. Sir, this is to remind you that you have missed the current month's payment that is due on your card. I request you to pay the same immediately to avoid penalty charges.”*

Rohit: *“Thanks for the call; I will try to make the payment at the earliest.”*

Ajay: *“Thanks a lot, Sir. Have a nice day.”*

Such a call, where the CSR speaks to the customer to remind him gently of a missed payment is called **soft collection call**.

Hard Collection Call

Here is another scenario.

Customer: “*Hello.*”

Ajay: *“Good evening, Sir, I am Ajay calling on behalf of ABC Financial. Am I speaking with Mr. Vivek? ”*

Vivek: *“Yes.”*

Ajay: *“Sir, this call pertains to your personal loan account number* XXXX XX XXXX*12. Sir,* *is to remind you that you had missed the payment and it is now overdue by two months. As per our last discussion, you promised to deposit the amount by 22 March but we have not received it yet."*

Vivek: *"I know my payment is overdue. I'll deposit it soon."*

Ajay: *"Sir, this is to inform you that our company cannot provide you any more time and cannot support you further. I request you to pay the amount to avoid any further course of action."*

Vivek: *"Thanks for the call; I will try to deposit the payment at the earliest."*

Ajay: *"Sir, if the payment doesn't get deposited within two working days , then we will have to send your name to the Credit Information Bureau of India Ltd."*

Vivek: *"I will definitely make the payment tomorrow itself."*

Ajay: *"Thanks a lot, Sir. Have a nice day."*

Such a call, where the CSR speaks to the customer to remind him of a payment due for a long period of time and informs him of the repercussions in case of further default, is known as **hard collection call**.

Complaint Handling Call

Read the conversation below, where the CSR takes an incoming call from a customer regarding their payment dispute.

Aman: *"Good morning, Sir. I am Aman, taking this call on behalf of ABC Limited. How may I help you? "*

Customer: *"Aman, this call is regarding my credit card number ending with digits 4444."*

Aman: *"Sir may I request you to provide some additional details to verify your account."*

Customer: *"Aman, I have a payment issue with your company credit card. I received intimation on 5 November saying that my payment date is 4 November! You've sent me the intimation after the payment date expires? Is this how you operate?"*

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Aman: *"I am sorry, Sir; I would request you to please give me some time to check the details. May I request you to please stay on hold? "*

Customer: *"Okay."*

A call where the CSR takes incoming calls from customers regarding payment disputes is a **complaint handling call**.

Handle a Collection Call

Step 1: Ask the person for their full name, date of birth to verify identity.

Step 2: Ask if it is a good time to speak. Call back at a better time if the customer says so. Do not be pushy.

Step 3: Show empathy with the customer's problems.

Step 4: Always be polite and civil even if the customer says they cannot pay.

Step 5: Try sincerely to help the customer find a solution. Suggest or recommend options after checking the customer's convenience in making the payment.

Step 6: Always check with a superior if it is not in your authority to offer solutions, since you are dealing with financial matters.

Step 7: Analyse and calculate how the amount can be paid off. Keep the customer's financial situation in mind while doing so. At the same time, ensure the company does not stand to lose.

Step 8: Fix a follow-up action plan at once.

Step 9: Compliment the customer for sharing their difficulties with you.

Step 10: Always leave a number for further enquiries.

OPEN-ENDED QUESTIONS

Establishing Rapport and Trust

This is usually done at the initial stage of a call when you wish to get familiar with your customer and wish to make them comfortable talking to you.

Examples

- What kind of problems are you facing while using this credit card?

- Why did you think of buying this model?
- What other improvements would you like to see in our service?

Information Gathering

Examples

- What are your requirements for this product or service?
- To understand your requirements, could you help me with a few more details?
- How is your laptop working now?

Qualifying

This is to verify whether the customer is really interested in buying the service or product.

Examples

- Sir, may I know what your budget is?
- Who else is involved in this decision?
- What other concerns do you have about our product or service?

Close-ended Question	Open-ended Question
Easier to compare responses	Detailed and qualified responses
Quicker and easier answers	Unlimited possible answers
Easy to interpret	Difficult to interpret
Easy to score	Difficult to score
Easy to codify for analysis	Difficult to codify for analysis
Example: Do you smoke?	Example: What is your view about globalisation?

Close-ended Questions

Closed questions need just 'yes' or 'no' answers. Sometimes, they may also have a short answer response. They help you get precise answers to your questions.

Examples

- Are you still in the market?
- May I send you the offer papers today?

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- Is this the kind of product you’re looking for?
- Are you considering buying this in the coming week?
- Is this a good time to talk?
- Would you like to give this a try?
- Which option would you like to proceed with?

Here are some pointers while asking close-ended questions.

Start Questions with Verbs

Close-ended questions start with verbs, such as ‘are’, ‘will’, ‘is’, ‘have’, ‘did’, and even with ‘aren’t', ‘didn’t' and ‘won't’. These questions bring the conversation gradually to a single point or decision. They are answered with ‘yes’ or ‘no’.

You use such questions when you want to narrow down the conversation and get specific answers that lead you to a conclusion.

To get Specific Answers

You can use close-ended questions to get specific answers.

Examples

- Will you be making a decision within the next week about buying this mobile phone?
- Is this the kind of bike that you are looking for?

To Force Customers to take a Stand

A close-ended question forces the customer to make a decision.

Examples

- Do you like this offer that I just told you about?
- Does this satisfy your need of buying a mobile phone with the features that you are looking for?
- Would you like to get this scheme right away?

Tip

- Ask close-ended questions in a warm, friendly and curious tone. Always be courteous, caring and concerned.

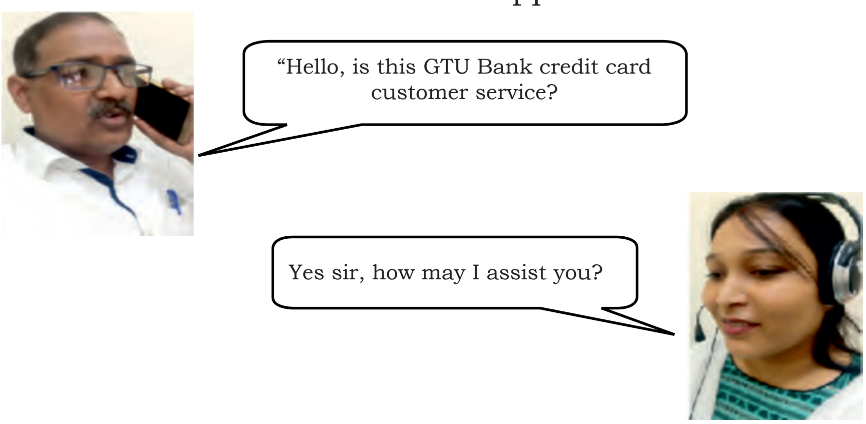
Complaint

These phrases are an expression of complaints against the product or service. In other words, a complaint is an expression of dissatisfaction made by a customer against a product they have purchased or service they have availed. Therefore, a complaint is the customer's response when they feel cheated or when the product or service bought by them is not up to the standards promised.

Customer Complaint

As a CSR you need to know that a customer will not complain without reason. A customer complains when they are either dissatisfied with the product or the product has not met their expectations. Apart from these there are many other reasons. Read through this scenario to find out.

Mr Sharma was offered a credit card. He is not happy with the service. Let's see what happened when he called.



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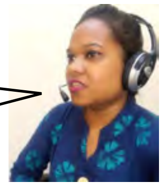
Now let us look at the reasons for the complaint in this scenario:

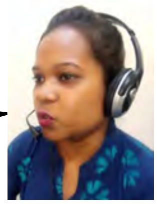
- The credit card company did not keep their promise of giving the customer a credit limit of ₹15,000.
- The product did not do what it was supposed to do.
- The customer had to face embarrassment because of the poor service.
- Complete and correct information was not provided, which resulted in unrealistic expectations of the customer.
- The customer service was very poor. The customer had been trying to get through on the phone for two days.
- The CSR neither admitted nor apologised for the slip-up.

Handle Complaints Effectively

Unhappy customers are bad news for the company and it takes only one of them to spoil the reputation of a company. Whatever be the cause of complaint, the customer is still an asset for the company. It is your responsibility as a CSR to resolve their complaints. If complaints are not handled properly, customers are not likely to return. Worse still, they will tell their friends not to, either. Research shows that customers whose complaints are not handled effectively are likely to tell eight to 10 people about it. Let us learn how to handle complaints effectively through this scenario.

Sanaya gets a complaint call from a customer Mrs Rao. This time she handles the customer complaint so well that the customer reaches an agreement, which is acceptable to her as well as to the company.





After a week...

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From these scenarios you can see that the CSR:

- listened to the customer's complaints intently and did not interrupt. This made the customer feel that she is being heard.
- sincerely apologised to the customer for the trouble caused. Gave a prompt solution to the customer in the form of a replacement warranty.
- entered into an agreement with the customer that was acceptable to her as well as beneficial to the company.
- promised the customer to get the defective product replaced in one week.
- followed it up after a week to ensure that the customer's complaint is closed.

Tips

Dos	Don'ts
Listen to the complaint.	DO NOT argue with your customer.
Follow up to ensure the complaint is closed.	DO NOT make false promises.
Solve the complaint promptly.	DO NOT ever think losing one customer will not affect the company.
Apologise for the complaint.	DO NOT ever be rude or defensive.

Handle Objections Effectively

As a CSR, you will have to develop a knack for handling customer objections. Let's us take a look at some common objections posed by the customers.

Situation 1

Customer: *"I am not interested, we are happy with our current provider."*

Sanya: *"Great! That is exactly what we heard from our most valuable clients before they switched. Our 10 minute conversation will highlight our history of delivering results whenever you decide to switch. How does this coming Tuesday at 2:00 pm sound?"*

'Whenever' allows for a less intimidating reason for the call.

Situation 2

Customer: *"There is no way you can do better than our current provider, what is your cost?"*

Sanya: *"Very good question! I am glad that you asked about the cost. I will make sure that my manager will start the face-to-face conversation by addressing the cost and compare the cost with your existing provider. How does this coming Tuesday at 2:00 pm sound?"*

While it may be tempting to get into the actual cost discussion over the phone, or any preliminary information about cost and pricing, our pure and simple suggestion on this topic is 'Don't do it'. Unless your prospect gets into the right mindset to discuss your product or service at the time of your appointment, they are not ready to hear about your company and everything you will say at this stage will be used as an excuse to terminate the call and not schedule an appointment.

Let's take a look at some other common objections posed by the customer and how you can overcome them.

Budget: "We just don't have the budget."

Regardless of who you're targeting, pricing is one of the most prevalent objections to a sale. For many sales professionals, the immediate reaction is to offer a lower price. Instead of offering up a fast discount, which is risky and raises questions about the value of your product, look for creative ways to show the unique value of your product or service.

The 'Price' Sales Objection: Overcome the 'Price' excuse by demonstrating the unique value of your product and give specific examples of how the product will solve a problem for the customer.

Authority: "I need to consult with X."

Even more difficult is the "My manager or boss says no thank you". Having a customer state that they need to consult their boss, partner or wife before making a decision or an authority has already rejected your product or service.

Always respect their position, but look at this objection as an opportunity to get the decision makers in the room. Identify the concern and address that specific

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issue. Rather than agreeing to wait for a phone call, keep the process moving by setting up a joint meeting with both parties or transitioning the sale to the final decision maker altogether.

Need: "I'm happy with my current set-up"

Self-satisfaction or an actual fear of change can lead many potential buyers to dismiss a product before they've learned what it can do for them and their business. Remember that complacency is often a result of being ill-informed about a problem or an opportunity, so if a potential customer seems self-satisfied, you will need to take the extra time to describe the comprehensive problem or opportunity in depth.

If you can, bring up examples or even better, case studies of their competitors who have made some recent changes similar to the one you are suggesting. Fear of change is a natural reaction, so you will need to calm the customer's concern by showing examples of positive change within the client's industry to provide a boost of confidence.

Timeliness: "We're too busy right now." Or Timeliness: "Call Again Later."

You've likely heard this, or something to the tune of "Contact me in a few months when we have the budget."

This objection happens particularly around the holiday season. In this scenario, you must make it so compelling for them to buy right now that they feel as if they'll truly regret passing up the opportunity. Simplify the buying process in some way and lay out attractive terms that are only available in a very specific window of time. Make it clear that "waiting until the first of the year", will mean missing out on a great opportunity.

Demonstrate why it is best for the consumer to make the purchase now rather than wait 3–6 months. Simplify the sales process and address a current business problem. Before jumping into the conversation, however, be sure to follow up with the customer to find out if you are simply calling at a bad time or if there is an actual business problem overloading the customer.

If it is a bad time, find out a better time to call. If it is a business problem, that gives you the information you need to show how your product will make the customer's life easier.

Value: "I need to think about it."

This objection is a combination of budget, authority, need and timeliness. If the customer does not see the value in the product, then it shows a lack of trust or certainty in what you're offering. Here, you'll need to build credibility with the buyer.

To create a more trustworthy relationship, come from a place of honesty and put yourself in the customer's shoes. Think "if I were this customer, what would be holding me back?"

Introduce benefits, such as specific features of the products that address their needs, guarantees or return policies. Basically, demonstrate that value. These types of perks reassure the buyer that they are making the right decision and will help to build the buyer's trust.

Ways to Deal with Issues Outside the Area of Your Competence

Despite being equipped to handle customer complaints and objections, there will be times when you will face issues outside your area of competence and authority. In such situations, you must seek help from your supervisor and peers. Supervisors, as per company protocols, have more authority and can take decisions to make changes to the systems and process. Let's take a look at a few situations.

Situation 1

Customer: *"I don't care what your policy is! I want to speak to the Supervisor now."*

In case a customer is not happy to speak to the representative due to non-satisfactory services or any complaint, customer generally prefers to speak to the supervisors. In such cases, it becomes a second level escalation and to make sure the customer is being treated fairly, the supervisor can go an extra mile by either adding a credit for the issue or adding some free service to make sure the customer is happy.

Situation 2

Customer: *"I want to know if the interest can be waived off, if I make the last payment early."*

In another case a customer wants to know some information, which is different from a CSR skill-set like legal information or any company's specific inquiry.

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Here the CSR, must transfer the call to a supervisor or a relevant person. Here, if the CSR decided to take matters in their own hands and in turn shared any incorrect or wrong information, it could lead to a bad experience for the customer.

Situation 3

Customer: *"I promise to make the payment within the next few days. In the meanwhile, please activate my account."*

Here a customer is calling a telecom company as his phone's service has been suspended due to non-payment. The customer promises to make the payment within seven days and requests for phone activation.

In such cases, where a request cannot be catered to by CSRs, then it is the supervisor's decision to check the customer's payment history and take a call whether to remove the bar from the account or not.

Determining the root cause will take some time to research, but it is well worth it. You cannot address a problem unless you know what is causing it.

Use your authority to handle issues. Sometimes, even if CSRs are empowered to handle customer issues they often do not use their authority for fear that they will be criticised if they do not 'get it right'. You must handle the issues well within your authority, instead of pinning it down on your supervisor.

Keep up-to-date and make sure you have a thorough knowledge base. If you have knowledge at your fingertips, you will be more confident about taking decisions.

Tips

There will be several other issues outside the scope of your authority. Remember, you must never commit to something you cannot offer or do. If you face a dilemma, it is best to escalate the issue to your supervisor. However, avoid escalating calls every time you hit a little bump. Here are some tips to avoid or reduce the escalated calls.

- **Solicit real-time help:** You must seek real-time support to resolve challenging calls. Support staff like the lead CSR will readily provide immediate assistance and support concerning unique customer inquiries. However, avoid asking the representative sitting next to you for advice on what to do about a customer's issue.

- **Manage your emotions:** Avoid losing emotional control. Sometimes, you will face demanding customers who will even use abusive language. In such situations, ask the customer to calm down using a polite but a stern tone. If the customer continues to use foul language, ask your supervisor to intervene.
- **Escalate when you have to:** Remember, some customers will insist on talking with the supervisor despite your best efforts to persuade the customer that you can handle their problem. In such a case it is best to let the customer have their way.

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Check Your Progress

A. Multiple choice questions
(You can choose more than one answer)

1. How will you greet customers over the phone?
   (a) "Hi, I am Kunal, I belong to ABC Telecom ."
   (b) "Good morning, my name is Kunal and I am calling on behalf of ABC Telecom."
   (c) "Is it Mr Jay? How are you doing, I am Kunal from ABC."
   (d) "I hope you know my name, it is Kunal and I am from ABC Telecom."
2. How will you respond when you get a call from the customer?
   (a) "Who is it?"
   (b) "What is your name and what do you want?"
   (c) "Hello this is Aarti from Airfin Telecom, how may I assist you?
   (d) "Tell your name".
3. If you are sitting and your supervisor comes to you for a discussion, how will you respond?
   (a) Stand up and respond while maintaining eye contact.
   (b) Respond without getting up.
   (c) Respond by leaning forward while sitting.
   (d) Stand up and respond without eye contact.
4. How would you greet if it is 4 pm?
   (a) Good morning
   (b) Good evening
   (c) Good night
   (d) Good afternoon

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5. CRM allows an organisation to ____________________.
   (a) provide better customer service
   (b) make Call Centres more efficient
   (c) complicate marketing and sales processes
   (d) help sales staff close deals faster
6. What is customer value?
   (a) The relationship between goods and services.
   (b) When expensive products deliver satisfaction.
   (c) When an individual becomes attached to a marketing campaign.
   (d) The relationship between benefits and the sacrifice necessary to obtain those benefits.

B. Short answer questions

1. What do you understand by customer?
2. How to handle objections effectively by CSR?
3. What is the importance of meeting and greeting?
4. What is the need for complimenting and commenting?
5. What do you understand by information security?
6. What are call centre metrics?
7. How to maximise conversion rate and increase your overall sales volume?
8. Define Upsell and Cross-Sell.
9. What is a complaint?
10. What are the characteristics of a confused customer?
11. What do you understand by information call and hard calls?
12. How to manage a collection call?

Practical Exercise

Introduce yourself in front of the class.

Material required

Mice

Procedure

- First try to make eye contact in a firm and attracting manner.
- Then simply introduce yourself like ' Hello, I'm Sumit.
- While doing the above do not forget to either shake hands or wave a ‘Hi’.
- Give a basic information about yourself.
- Find out what interests the other.
- Listen to them carefully.

Unit 4

Using CRM Application: FreeCRM

Introduction

CRM software provides support to maintain and compile customer records across different points of contact between the customer and the organisation. This could be telephonic, by e-mail, an online chat, marketing products or the company's website. CRM software also provides a customer's personal information, purchase history, deals, targets, documents, assigning details, priority, buying recommendations and concerns to customer service representatives.

An employee's contact information, performance reviews and benefits within a company can be tracked with the help of CRM.

Due to the growth of the Internet and related technology, customers are worried about the privacy and safety of their personal information. Basically, data are needed to assure that customer related information has the highest levels of security against cyber criminals.

FreeCRM web application provides default company information for creating new contacts tasks, deals and other objects. For example, the Shortlist feature allows for a quick list; Message boards are provided where your team can communicate and leave important messages for each other; Custom views allow you to create different presentations of your data using extended search parameters; Schedule a call by creating an event entry for it in My Calendar; Schedule a meeting event by choosing a name for the engagement and selecting your team members who will attend; the Call List is a link to schedule calls for you and your team members; Resources are information links, which can be informational postings with instructions or any other free text, or can be hyperlinks; the Team View is a top–down view of your team and its progress; importing contacts from Outlook, your Palm, Act, Goldmine, Salesforce or other applications is a quick way to get started and migrate from your current CRM; exporting data gives you a copy of all of the information contained within the CRM application. You may export all the information tables including Companies, Contacts, a combined table of both, Deals, support Cases, Tasks and Calendar items. Sales targets are extremely important for tracking key measures by amount of units sold, revenue-based goals and customer service metrics. Update Profile allows you to set a default currency, a time zone and welcome text for your team. Administrators may then select if users can share information, if information is private, or if only managers can see private information. The Calendar is a monthly view of all of your important events, calls, tasks, or whatever you want to store and track.

Basic Steps to Login in FreeCRM

1. Log in and click Setup on the top-right of the screen (the silver tab).
2. Choose Update Organisation (3rd choice) and fill in all the information about your particular organisation and then click Save.
3. Go back to Setup and click Update Profile (1st option). This is where some very important

parameters are set, including default currency, time zone, security access mode, look-and-feel and clock mode. Click Save when finished and go back to Setup.

4. Use the Regions and Set Unavailable Times and Availability by Region if your organisation is multi-location. Save all your changes and return to the Setup menu.
5. Select Create/Edit Users. Add as many users as you like; be sure to choose unique user names; we suggest using email addresses as the user names. Also, you can designate managers/administrators for special users as you create them. The system defaults to creating standard users.
6. From the Setup menu, choose Setup Extended Fields. This allows you to customise company, contact and event/appointment records with specific information that pertains to your business.
7. Choose the last option, Setup Field Sets to customise products and deal records to match your specific business.
8. Click POP Accounts on the left-hand navigation. Then click New POP Account and add as many POP accounts as you like by giving a title to the account (Account name), the e-mail address, the host name or IP address of the server and the username and password for the POP account. Click Save to record the POP account information.
9. Click Import/Export from the left-hand navigation to import comma separated values (CSV) files from Act!, Goldmine, Microsoft Outlook, Palm, Salesforce, NetSuite, Upshot, Salesnet or any other application.
10. You may now start using the system. We suggest that you begin first by going to the Sales Targets section using the left-hand navigation and creating sales targets for user.

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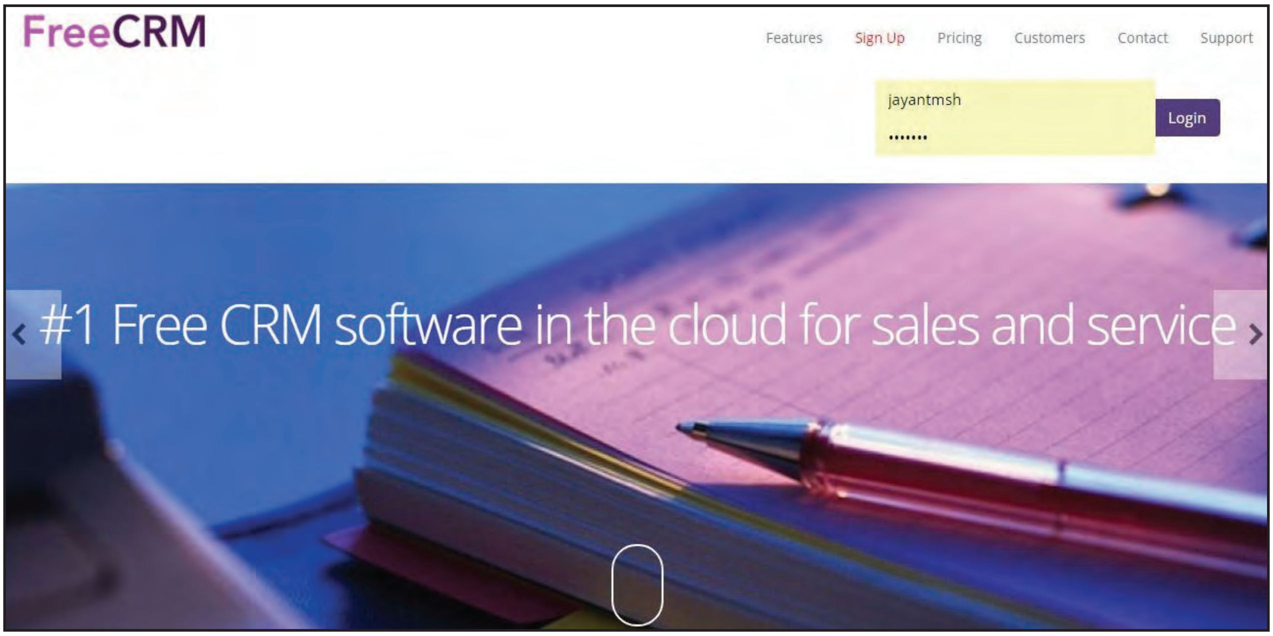


Fig. 4.1: FreeCRM Login Home Page

Home

This is user sales automation home page, where user can manage customer relationships and interact with user sales force.

First, go to Setup and add new users to old user account under Create/Edit users. Add as many as user want in our free version. Professional users will be billed $9.95/month per user.

Here user can see calendar and a quick list of upcoming events for the week. The user can also see a call list and any e-mail campaigns user that are active.

There are quick links on the left side of the screen to the message board, which is a standard announcement and discussion page for user team members. Also, user may schedule calls, create a meeting, or create a quick company or contact.

User may also quickly import data from Palm, Microsoft Outlook, or a number of other applications easily, including Act! and Goldmine. Simply choose the import feature and follow the easy steps provided. Please note that this may be a fee based feature that could require user to upgrade to the professional version of the software or pay a fee. FreeCRM is a free and open source web application to be used for various CRM activities. But you are required to pay for some options, such as e-mail. It will allow using email facility after paying the fee. For these can go to the message **Upgrade your account** on top of the page. By clicking on this you can pay user fee.

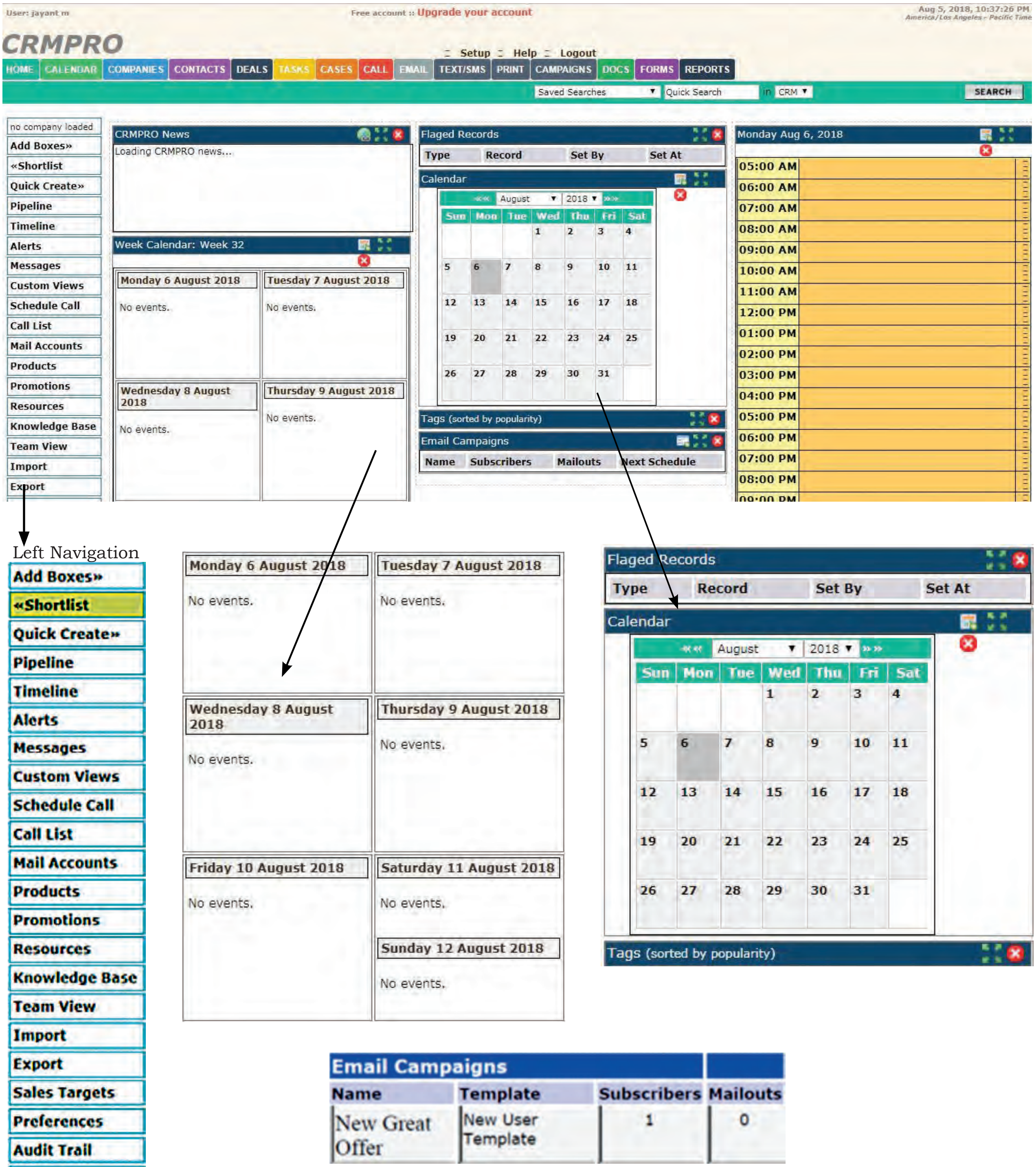


Fig. 4.2: Logged FreeCRM

The first step is to set up any POP email accounts user may have. This way, user can utilise all the e-mail functions.

On the left navigation bar are links to team resources, which are links to important web sites for you organisation.

Also, there is a link to view user Team and Sales Targets. Some of these features may only be visible to the administrator account of user organisation.

Fig. 4.3: Quick Create windows

Default Company

The Default Company feature locks default company information for creating new contacts, tasks, deals and other objects. To activate this feature, navigate to the Company tab and select a company by clicking on the link for the company name. User should then see the details for the company and under Default Company user should now be able to see this name. From this point on, creating a new contact, deal, task, case or other data items will default to this company.

When user create a company user will see a window as shown in Figure 4.3.

After clicking the Quick Create option user will create a company.

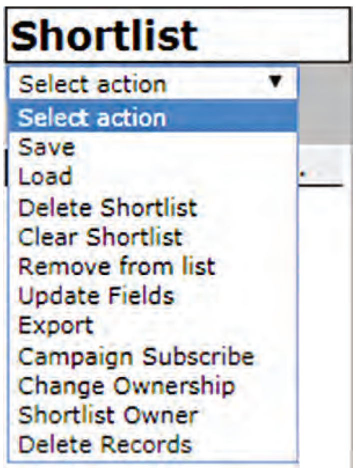


Fig. 4.4: Shortlist Options

Shortlist

The Shortlist feature allows for a quick list which is accessible at all times from a new left-hand window. To activate the shortlist, select the FLAG link from any list of companies, contacts, or any other item in the system. This creates a fast pick list of items from which user can now quickly navigate. User can deactivate the shortlist by toggling on and off using the left navigation button for Shortlist.

Message Board

Fig. 4.5: Message Board

Message Boards are provided where user team can communicate and leave important messages for each other. Utilise the Message Boards to discuss issues or post notes concerning the general operation of business. Click New Message to start a discussion thread. Other users may now choose to reply to the message that has been posted.

Custom Views

Custom views allow user to create different presentations of user data using extended search parameters. Simply create a custom view for user contacts and companies; select the fields that user want to see and give the custom view a title. After creating a custom view user can then utilise the extended search features on the Company and Contact sections. Simply click Extended Search and then select a view to apply from the drop-down selection box.

User may additionally select to filter on status or matching parameters in the name field.

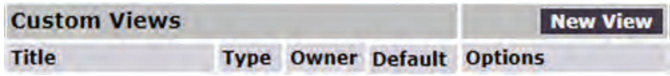


Fig. 4.6: Custom Views

Schedule Call

Schedule a call by first checking the box 'Schedule this call for the date below and create an event entry for it in My Calendar'. Select date and time and also choose a Call Script for the call. User may assign the call for a team member by selecting the drop-down box. The call can be an arbitrary contact and phone number, or alternatively user may select from the existing contacts and client lists using the lookup buttons on the respective fields. Notes for the call can also be recorded to assist in the future scheduled calls.

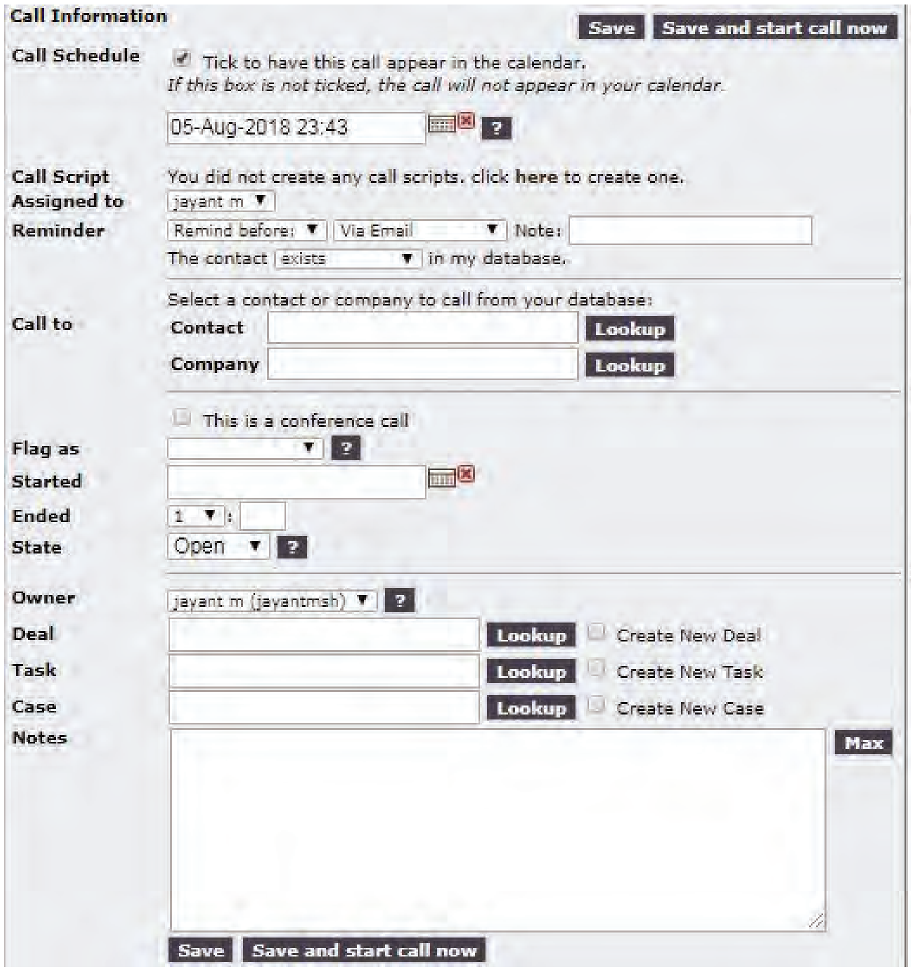


Fig. 4.7: Call Information

Create Meeting

Schedule a meeting event by choosing a name for the engagement and selecting user team members who will attend.

Highlight the team members' names in the left pane and click the Add button to add each team member to the right pane. As the user select each team member, the right information pane will show if the resource is available for the event.

Call List

Fig. 4.8: Search Call List Window Call List

The call list is a link to scheduled calls for user and their team members. The call list is divided into two parts—a list of calls to be made and scheduled calls.

POP Accounts

The integrated POP email feature automates and integrates user most powerful online tool—user very own email.

First, user must have a POP3 account; enter user POP mail server and authentication information, give a title to the account and a description and save user new POP account. User can aggregate an unlimited number of POP accounts.

Select 'New POP Account' button to create the new POP account; enter the account name, e-mail address, host server name or IP address, username and password. User may also give a description of this POP mail account.

Select 'Get' to view user POP mail. This account is integrated for outgoing correspondence and is not intended to replace user normal mail reader. User can view the last messages.

Resources

Resources are information links, which can be informational postings with instructions or any other free text, or can be hyperlinks. Create resources for marking quick links to partner sites, vendors, customer websites, legal documents or any other kind of web resource.

Enter the type of link, either hyperlink or data types, a title or the URL. For a data resource, a large text box will be presented, allowing user to input user resource message for user team's instant access.

Team View

The team view is a top–down view of user team and its progress. Managers and administrators as well as other team members have instant access to the rest of the team, with contact information and other integrated features, event scheduling, document sharing and messaging.

From this view, user can quickly update and edit team member information. Simply click on the name of the team member to view their information and to create actions, or click on the Edit button to update any of the team member's information.

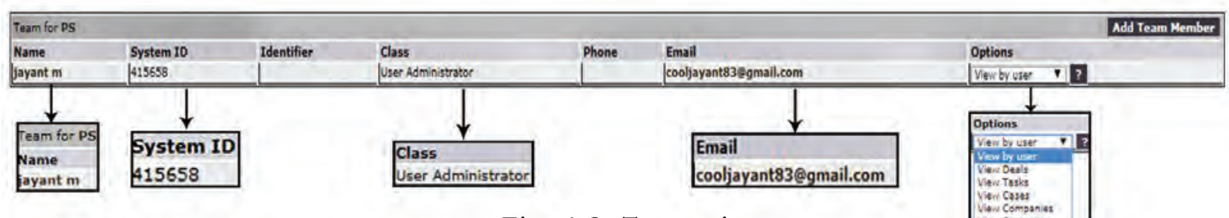


Fig. 4.9: Team view

Import

Importing contacts from Outlook, Palm, Act, Goldmine, Salesforce or other applications is a quick way to get started and migrate from user current CRM.

The user can import and comma separate tab-delimited or custom delimited files. User may include the first row as headers to make the import easier, or import the file and begin mapping the columns.

First, user must Export data from its current location. Below is a quick guide to exporting data from a number of popular programs.

Exporting data from Microsoft Outlook

1. Choose File Import and Export.
2. Select Export to a file and then click Next.
3. Choose comma separated values and then click Next.

NOTES

4. Select the Contacts folder and click Next.
5. Save the exported file to a known location. Name the file with an extension of CSV, for example, name the file 'export.CSV'.
6. Confirm the export in the next window; user may customise the field mappings.
7. Click Finish.

Exporting data from Palm Pilot

1. HotSync user Palm to synchronise all user latest changes.
2. Start the Palm Desktop.
3. Click the Address button on the left-hand navigation.
4. Click File_Export.
5. Choose a file name and select Export type as Comma Separated.
6. Choose a file name with an extension of CSV, such as export.CSV.
7. Choose a range of All or currently selected contacts.
8. Click the Export button.
9. Specify Export Fields for the resulting file to make sure all information is exported.
10. Click OK.

Exporting data from Act!

1. Choose File||Data Exchange and then Export.
2. For File type, choose Text – Delimited.
3. Choose a file name and location, such as export CSV.
4. Choose Next, then select Contact records only.
5. Choose Options, make sure Comma is selected for field separator.
6. Check Yes, export field names and then click OK.
7. Click Next, then All Records, then click Next.
8. Click Finish.

Exporting data from Goldmine

1. Choose Tools >> Import / Export Wizard >> Export Contact Records.
2. Choose Export to a file and ASCII file and then click Next.
3. Select All Contact Records and then click Next.
4. Add all the fields that user wants to transfer and click Next.

** DO NOT EXPORT THE NOTES FIELD

5. Enter a file location and CSV extension, such as export.CSV.
6. Click Export GoldMine field names that has mappings as first record and click Next.
7. User may save these file export settings as a profile (optional).
8. Click Next, then Finish.

Exporting data from salesforce.com

1. Obtain export files leads.csv and/or contacts.csv from salesforce.com.
2. Import each file directly using the Import tool; user may have to remove duplicate records from the two files. Export data form: Select export options below. It is recommended to use a Tab Delimited export for opening in MS Excel.

The export will open in a new window.

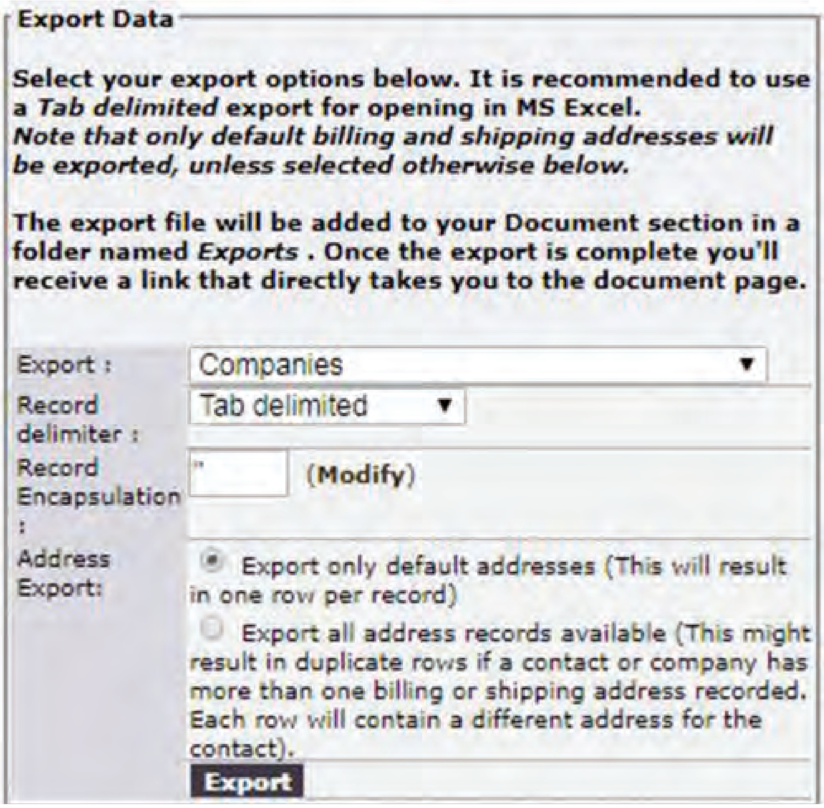


Fig. 4.10: Export Data Window

Export

Exporting data gives user a copy of all the information contained within the CRM application. User may export all the information tables including Companies, Contacts, a combined table of both, Deals, Support Cases, Tasks and Calendar items.

First, choose which table user want to export and select if user want the result to be displayed in the browser or automatically open the Microsoft Excel application. Next, choose a field delimiter, such as tab-delimited or comma separated. User may then select a record encapsulator, such as quotation marks (default) or any other character that the user chooses; user may then select whether they want a line feed or a carriage return as a row separator.

Click the Export button and the user will then have user data displayed, which user may save and manipulate as per wish.

Sales Targets

Sales targets are extremely important for tracking key measures by the amount of units sold, revenue based goals and customer service metrics. Create a target and assign the type, whether it is by number of goods sold, number of customer support cases, or revenue-based goals. User can assign a timeframe in terms of months, quarters, or years and assign multiple team members to the sales target that is created.

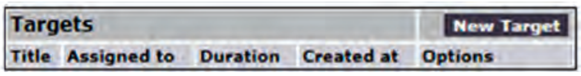


Fig. 4.11: Targets Window

Profile Setup

Update Profile allows user to set a default currency, a time zone and welcome text for user team. Administrators may then select if users can share information, if information is private, or if only managers can see private information.

User can also select the default design look and feel using the skins selection box, a clock mode and the amount of history shown for user activity tracking. User may then designate start and end times for user work days and also if user want to check schedules against a user's availability.

Fig. 4.12: Setting New Target

Calendar

The Calendar is a monthly view of all user important events, calls, tasks, or whatever user want to store and track.

Simply point and click through the Calendar to the date and time that user want, then schedule an event.

When viewing the monthly calendar, click on the date that user want to see or schedule and drill down to the exact details of each event. User should now see a running view of a single day with the hours on the left side and a memo/entry field on the right. Find the time that user want to schedule an event and click.

Next user are presented with the Event information page. User must assign a title to the event and then the user can assign user team members as a single participant or multiple participants. As user add team members to the calendar, user will be given a notice as to the availability of user selection as it pertains to the schedule of each resource.

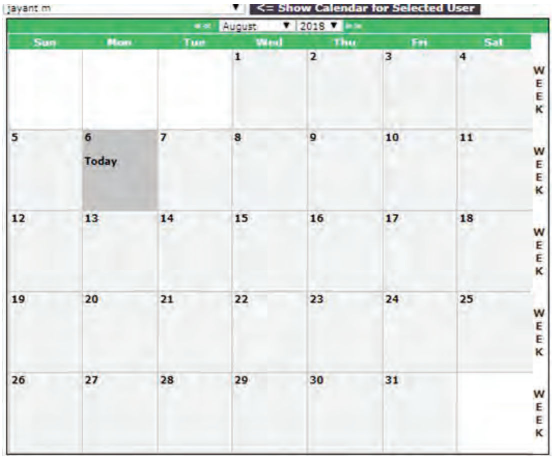


Fig. 4.13: Calendar for User

Next, pick the time that the event starts and ends. User may also designate if the event is confirmed via yes/no radio button. The e-mail alert feature, when checked, will send an email invitation to all event attendees.

If the event is scheduled with a Contact or Client, use the lookup boxes to fill in this important information. In the location box, give the details and directions, if necessary so that everyone knows exactly where to meet and how to get there. In the notes field, enter any other important information for the event.

Create an Event

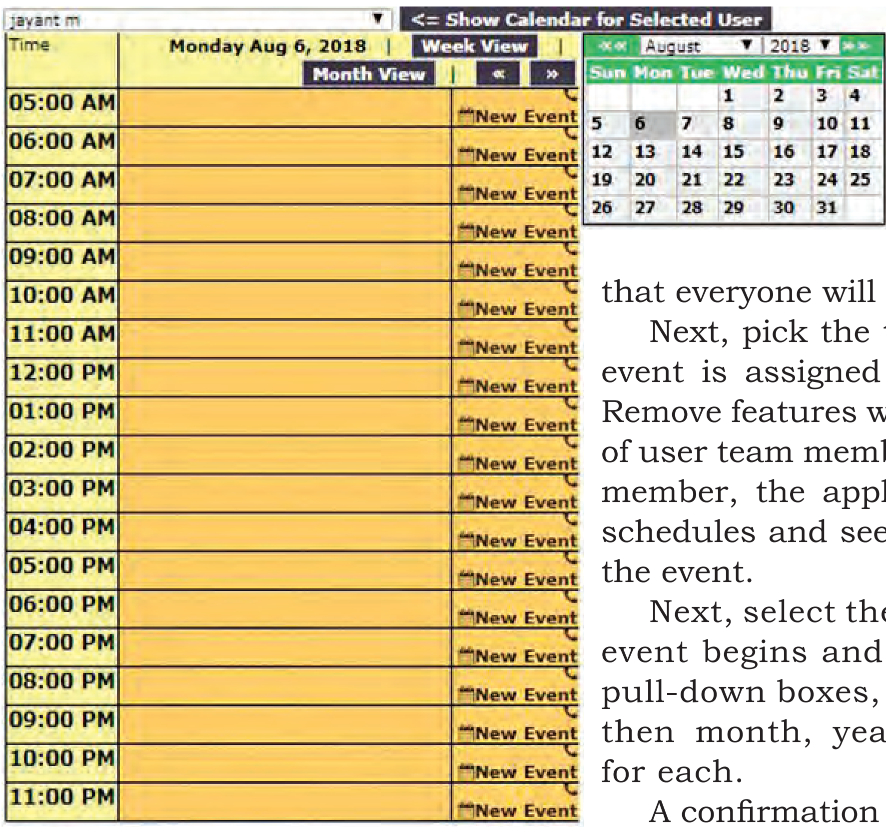


Fig. 4.14: Shows Calendar for Different Users

Create user event by first giving a title, or name to this event. This is what will show up in the Monthly and Daily views and should be a short description that everyone will recognise.

Next, pick the team members that this event is assigned to, using the Add and Remove features while selecting the names of user team members. As user add a team member, the application will check their schedules and see if they are available for the event.

Next, select the date and time that the event begins and ends using the simple pull-down boxes, first selecting the date, then month, year, hours and minutes for each.

A confirmation radio button is provided to mark the likelihood of an event and to show if it has been approved by the customer or contact.

An e-mail alert can be sent out that will let the event participants know that this event has included them and may serve as an official invitation to the event itself.

If this event is focussed around a particular sales lead or customer, user can quickly use the Lookup buttons to assign this event to a Contact and Client.

Finally, include a description of the location and directions to the event and any additional information in the Notes field. Do not forget to click the Save button at the bottom of the Event information page to make user event active.

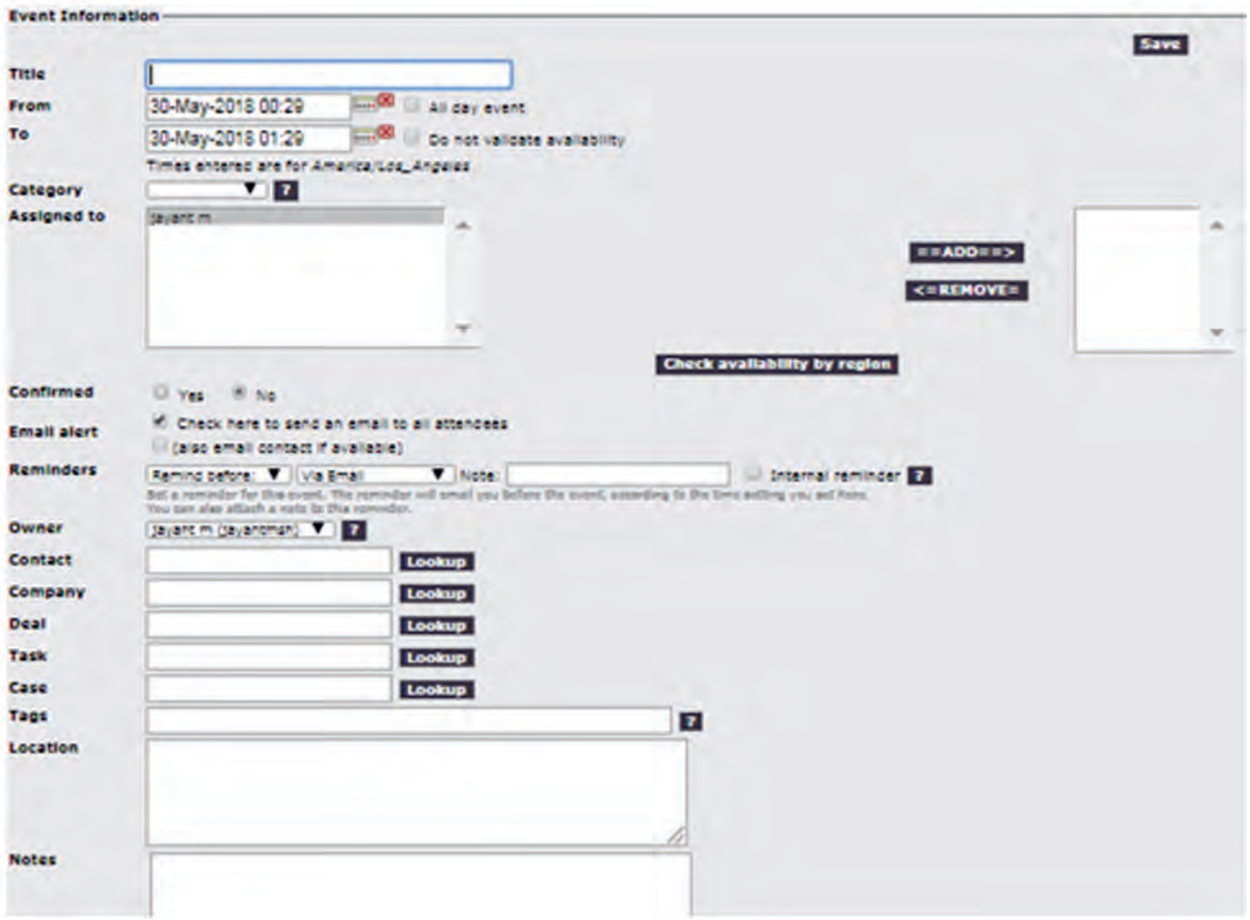


Fig. 4.15: Shows Calendar for Different Users

Company

Companies are the large business units that operate as a single organisation. Create a Company to add and associate contacts quickly. Simply click the New Company link to create the new company record.

The master entry for the company is usually the headquarters; the location of user contact will determine the region, department and other details of user specific contacts, but the company record is usually the headquarters location.

From the company's view, user can see top–down all contacts, deals, tasks, cases and other related actions and events that correspond to each entity on a corporate level. In this manner, user team can best relate success to individual markets, regions and team members. Analytics for company CRM or Sales Force Automation (SFA) behaviour are a part of the Reports section of the application.

Managers can assign contacts to team members and track success and activity through the system as deals are progressed or trouble cases closed. Users of the system see only their assigned or personal contacts and managers have the option to keep the system private or open depending upon the options set in the site administration setup.

Create/Edit a New Company

The only required field is the company name. However, there are numerous data fields including industry, annual revenue, number of employees, billing and shipping information and a detailed description form.

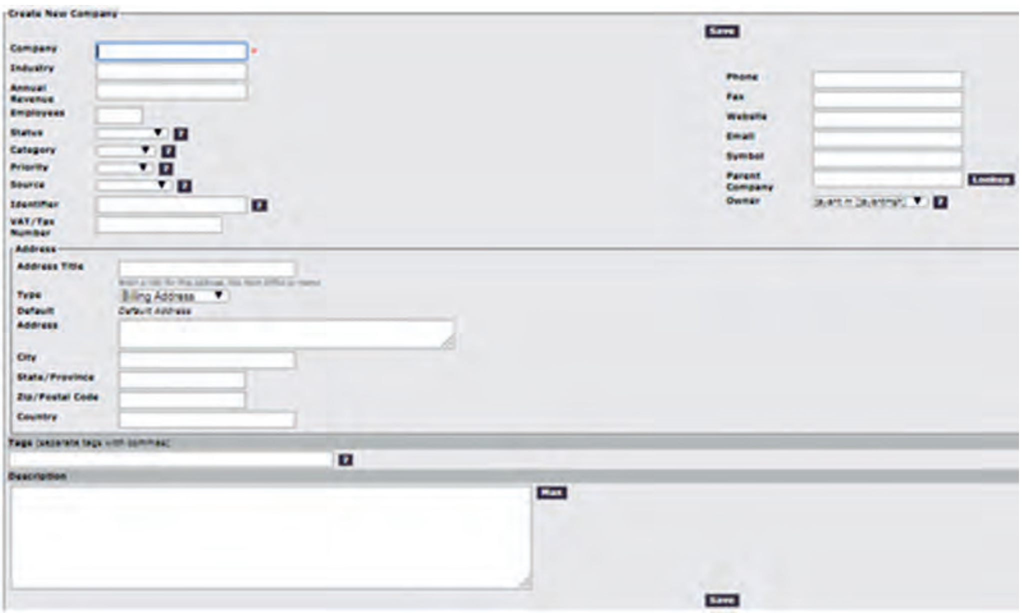


Fig. 4.16: Create/ Edit a New Company

User may add custom fields through the administration setup of this application.

Set a priority to this company. Then save user work and begin adding contacts to the company, including calls and scheduling and assigning sales or support staff.

Contact

Contacts are people's individual contact information —people who user want to track, they could be sales leads, customers, vendors or whoever.

Contacts are tracked through the application via the company that they are assigned to, which user may have already created, or just contacts that user may want to track without any corporate identity if used as a customer service centre. The nature of the relationship can then be created based upon the contact and company, establishing a number of options and features for converting this contact into a valuable sale or support issue.

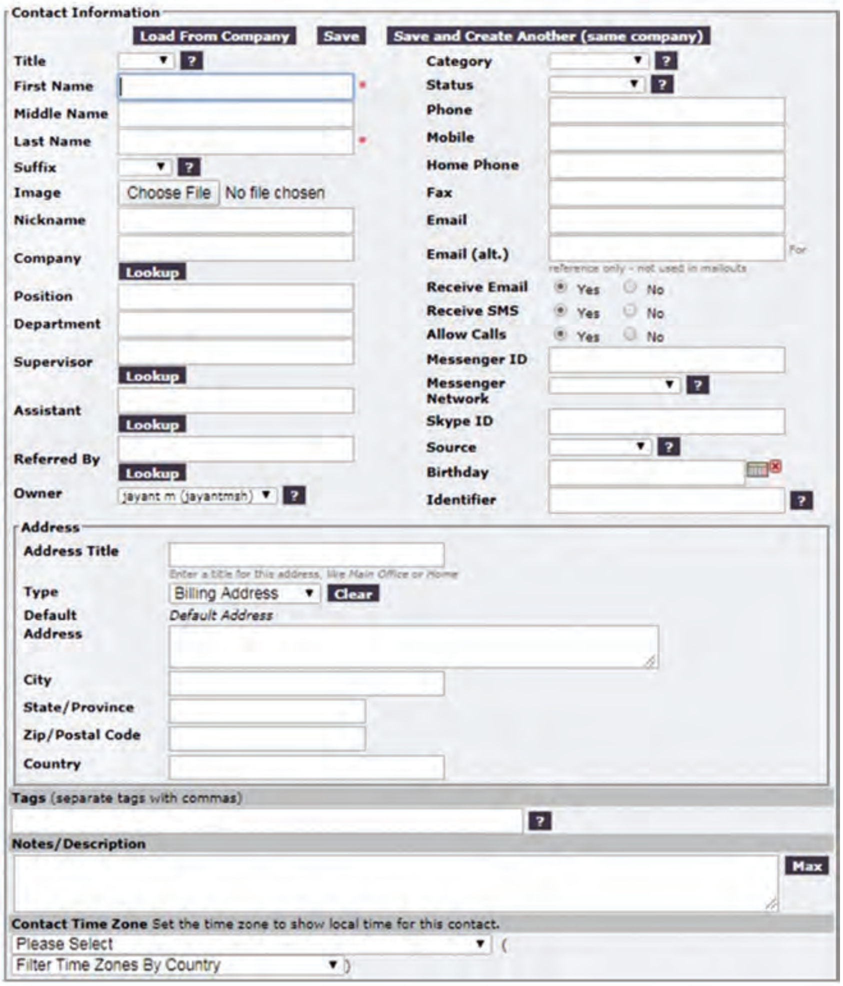


Fig. 4.17: Create/ Edit a New Contact

Contacts are individual members of a target group for sales or customer support, such as customers themselves.

User may freely import contacts using any of the popular Palm, Microsoft Outlook, Act or Goldmine data; anything that will export a comma separated value (CSV) file can be used to import all of user current contacts.

Create/Edit New Contact

User can add a new contact quickly, but first try to create the Company record for this contact. Enter the contact information including e-mail address, instant messenger (IM) and network and various shipping information. User may also enter a description and assign the contact to a particular e-mail campaign.

Once created, user contacts become a vital piece of the CRM and SFA process, allowing user to track calls and e-mail interactions, product support cases, deals and just about any other type of business process.

Deal

Deal tracking ensures that user pipeline is traceable by user whole team and management; so look like user are doing something and create some prospective deals to track the relationship.

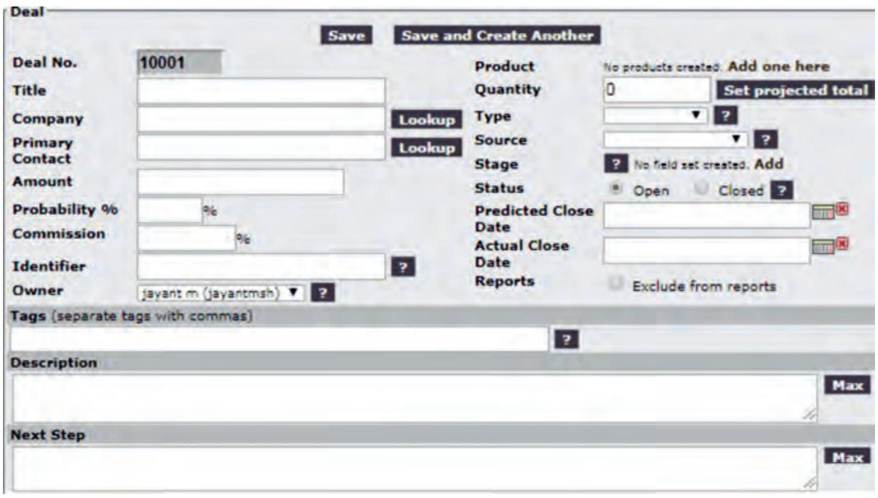


Fig. 4.18: Create/ Edit Deal

Deals are usually created when user have started to discuss pricing and/or need to send out quotations or estimates.

Converting a contact to a potential deal is the object of sales force automation, tracking the leads through the pipeline and managing the relationship, driving the potential customer to the eventual sale.

Deal tracking will assist user organisation in forecasting and user sales staff in meeting their goals. Deals can be related to sales targets, which can be set using the left-navigation link and assigning targets using the quotas feature.

Create/Edit Deal

Creating deal items are important for tracking hot leads and future sales, customised with user pre-set sales targets and goals that user define.

Deals are usually associated with companies and contacts in the system and are thus assigned. The title of the deal can be any short text description, plus there is a data field for a detailed description and follow-through plans in a next-step field. The product associated with the deal, the stage of the deal, its closed or open status, is all tracked.

Task

Tasks are short-term or long-term goals or to-dos. Click on New Task to create a new task assignment. Once created, tasks help user to track ambiguous targets and goals that may help user to close more deals or help user organisation function more efficiently.

Tasks are general goals that are usually tied to operations, functions, administration, accounting or other things that may not be directly related to a sales or support function. Use Tasks to generally track everything that user find user own creating notes for or special, pet projects that have less defined objectives. Tracking tasks, using call automation and tracking, management of user schedule and e-mail are all resources and techniques that can help user increase user customer focus and to create a high-touch customer experience. Sales are directly related to the amount of care and attention user sales staff shows to user customers and task tracking is one of the important ways to track activities and create more opportunities; click New Task to create and open a new task, enter a title, deadline, status, estimated completion, deadline and assign the task to a Company and Contact and add a description.

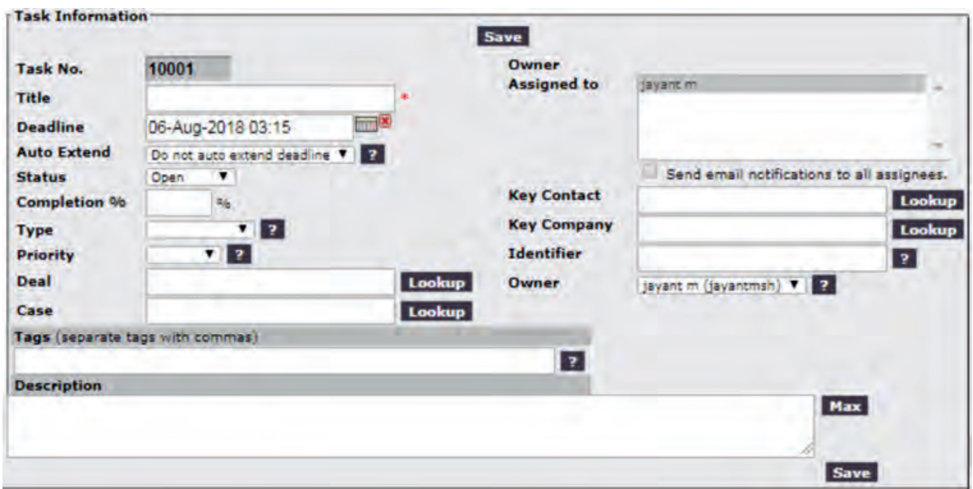


Fig. 4.19: Create a Task

NOTES

Create/Edit Task

Create a New Task by first giving a title, or name to the task. This can be specific or somewhat of a grey area.

Specific goals may be entered or a particular action, such as met quarterly goals, finishes a report, etc., but try to be specific.

Next, set a deadline for the task and try to estimate how much of it has been completed as a percentage. User can then assign the task to user itself or one of user team members and if it is related to a particular customer or prospect, link it with the Key Contact and Key Company fields.

Finally, enter a detailed description of the task that will help to explain the focus and goals of the activity. This field may be updated regularly as user edit the task, changing the completion and description as user work to meet user goals.

Case

Track customer support cases with a simple problem case tracker.

To get started, click New Case to open a new problem ticket.

Next, enter the name of this problem, the status and the date closed. User may also change the owner of this case and assign a contact or company to the problem ticket.

Next, enter a detailed description of the case and save the record.

Now that the user has created a new trouble ticket, or case, user team members can now be assigned for resolution of the customer issue. Managers can create tasks and assign resources to the problem and user can track the problem historically so that any other issues that occur can quickly be fixed using the same processes that user have established for resolution.

Click New Case to log a new customer problem or service issue. Give the case a title, assign a status, a closing date and assign to a Company or Contact, then enter a description; it is that easy.

Create/Edit Case

Track customer support cases with a simple problem case tracker.

To get started, click New Case to open a new problem ticket.

Next, enter the name of this problem, the status and the date closed. User may also change the owner of this case and assign a contact or company to the problem ticket.

Next, enter a detailed description of the case and save the record when user are finished.

Now user will have an open case record. User can use this to track calls and e-mail, provide support literature and create future meetings and events with user team members.

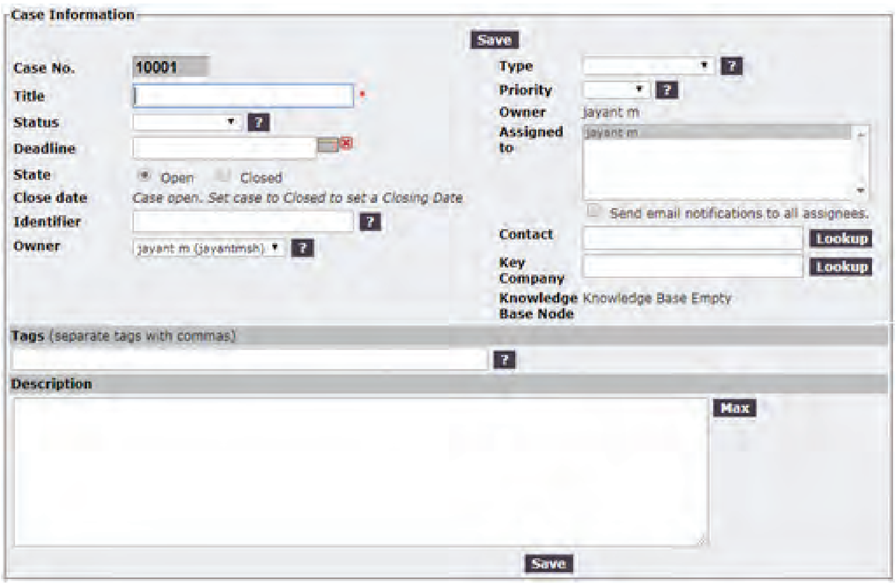


Fig.4.20: Case Information

Call

Complete call scripting, scheduling and tracking is possible from the call screens. User can create call scripts that user sales agents can read and complete during a call, important information that user can capture for reporting and analytics that will help user organisation better understand the customer.

Notes

Notes

First, create a call script, which is a mixture of text for user sales agents to read and also interactive questions and answers that are important to user sales. Create a call script for each of user major functions and also scripts for special activities.

User can schedule calls for user itself or other team members for a particular time and date and then choose which companies and contacts that user would like to assign to the call. User can also enter additional information that may assist user sales and customer service staff.

Track important call information and follow-up using reports to find contacts that may have got stuck in the deal pipeline. By using call automation, e-mail campaigns and task tracking, user will find that realising more income and closing more sales is directly related to the amount of personal attention that is taken in keeping the customer relationship maintained.

Click New Call to start a call. User should have already created a Call Script, so assign a script to this new call. User may make the call now or schedule the call in the future; user may also schedule the call for another team member.

Create/Edit Call

Click New Call to start a call. User should have already created a Call Script, so assign a script to this new call. User may make the call now or schedule the call in future; user may also schedule the call for another team member.

If user want the call to appear on the calendar, user must check this box to schedule the call.

Choose the day of the call. If the call is in the future and user wish to schedule the call on the calendar, remember to check the box at the top of the call screen.

Calls may be assigned to team members, or user can log calls made in the past by other team members as well. Contacts and Companies can be designated in the call using the appropriate Lookup feature. If the call is with persons who are not in the system, user may log a name and phone number. If this is new information that user would like to track, check the box below to create a new contact in the database. User may also write a note about the call.

On the right side of the Calls screen, there is a search feature for calls by keyword, call script, status (flag) and a date range. Under the call search options and on the right side of the screen is a box where active calls or upcoming calls are shown.

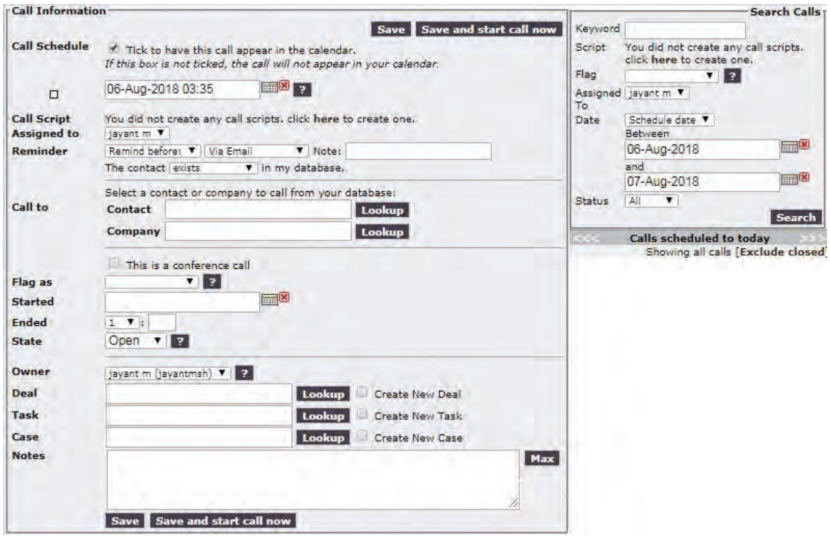


Fig.4.21: Call Information

Call List

The call list is a summary of all upcoming scheduled calls. User may quickly access user call list using this link; the names of the persons to be called, their primary phone numbers and the call button are displayed.

To begin the call, select Call from the right side of the table for the particular call that user wish to begin. User will next be presented with the Call Info page.

The Call Info page will show all the call statistics and give options to change status, schedule a follow-up call, restart the call and complete call tracking. The Call Script that is assigned to the call is also displayed so that it is easy to capture all the information required for this activity. Remember to save the call information if user edit or add information to the call script.

Call Scripts

Call scripting is important in automating user call activities. Call scripts are custom question and answer sheets that user can collect specific information on during a call and easily track all the data.

First, give the script a name and a description and then select Save to begin building the call script. User may also load (edit) and delete existing call scripts from the main call script screen.

A call script may consist of instructions or questions and responses for the persons doing the calling and being called.

A call script is composed of individual elements, which may be free-text, yes/no and multiple choice. The process for creating the call script is to enter a question and then to select the type of question on the form.

User can add entries by clicking Add. Click New to clear the form and create a new entry.

e-mail

Add a POP e-mail account or two, as many as user like; track sales leads through user very own e-mail accounts. To take advantage of this feature, user must have an account with an Internet Service Provider (ISP) that supports POP3 mail.

Use user login information for remote viewing of user POP accounts. Using this feature will also allow user to mail merge e-mail messages and forms to user contacts or service cases.

User may add an unlimited number of POP accounts and aggregate some of user recent mail using this feature. However, this is not a mail application and is not intended to function as a mail reader and sending utility. POP accounts are utilised as a function of interactivity with customer records and cannot be used to read mail, but provides quick views of user latest messages with subject and time stamps. This e-mail feature is an upgraded version after paying a fee.

Fig.4.22: POP e-mail account

e-mail Campaigns

Add a POP e-mail account or two, as many as user like; track sales leads through user very own e-mail accounts. To take advantage of this feature, user must have an account with an ISP that supports POP3 mail.

Use user login information for remote viewing of user POP accounts. Using this feature will also allow user to mail merge e-mail messages and forms to user contacts or service cases.

User may add an unlimited number of POP accounts and aggregate some of user recent mail using this feature. However, this is not a mail application and is not intended to function as a mail reader and sending utility. POP accounts are utilised as a function of interactivity with customer records and cannot be used to read mail, but provides quick views of user latest messages with subject and time stamps.

Fig.4.23: e-mail Template

When user are finished creating an e-mail template, choose Save. User should be able to see the new e-mail template appear in the right side panel as an existing template.

To begin with campaigns, choose New Campaign from the e-mail tab. Give the campaign a title and choose if this is a regular periodical mailing or just a one-time mail out. Next, select the template that user wish to be assigned to this mail and also designate which POP e-mail account will send the message.

Once finished, user will be presented with the e-mail campaign detail page, where user can see all the statistics for this campaign and the e-mail template itself. From this menu user may send the e-mail, edit the campaign or archive it for historical purposes.

Fig.4.24: e-mail campaign

Doc

Fig. 4.25: DOCS Menu

Provide a fully functional document and file repository, where user can include any typical electronic documents, stored on a shared, virtual system for access to user whole sales and support team. Store all user important marketing material and assets, sales literature and pricing. All user company information is instantly accessible.

1. Click New Directory and give the directory, or folder, a name, a description and choose a parent folder, then click Save.
2. Click the New Folder icon.
3. Click New Document. Give the name, description, version and upload the file. User may assign it to a client or contact.

If user are browsing the directory tree, choosing Root Folder will get user to the parent directory. User may quickly click through a number of folders to view user files; if user get lost they can always click Browse at the top of the page.

Free version users have a limit of 5 megabytes of information stored of the shared document folders. Professional users have 100 megabytes of shared space for documents.

Fig. 4.26: Create New Document

Create Document

Create a New Document from within the active folder; give the document a title, its version and check if user want to overwrite existing files with the same name. User may also choose the destination folder from the pull-down box and assign this document to a particular contact or client company.

Use the File upload box and click Browse to find the file on user local computer. Once user find the file and have checked all of the fields for accuracy, click the Save button.

User document should begin to upload. If user have sent a large file, wait and make sure that user have the fastest and most reliable Internet provider and that large file uploads are allowed by user ISP (Internet Service Provider).

Create/Edit Document Folder

Creating a Document Folder is easy and simple. Just give the Folder/Directory a name, assign it to a root directory and a description of the file folder. Creating a few default folders and setting the structure of the document repository is a good first step.

Usually, folders are named after team members, allowing each person to create their own document store, with the addition on departmental folders such as Accounting, Sales and Marketing. All resources are shared, so creating the initial folder structure and uploading documents or other files helps user entire team to get started.

Uploading files is simple. Navigate to the proper folder and click New Document. Give the document or file a description, the version of the file, the folder to which it will be uploaded and attach customer or contact information. User may also choose to overwrite existing files, which will cause them to be updated. When finished, carefully check user input and click Save.

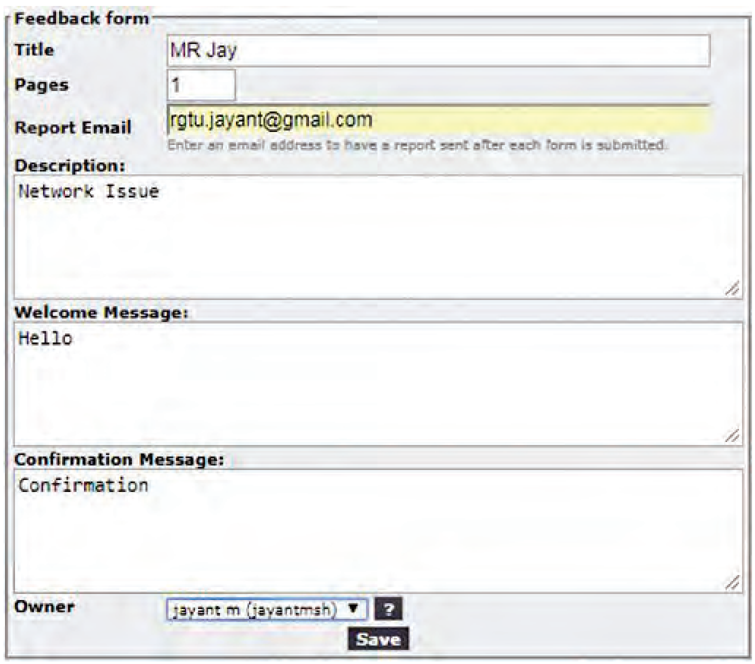


Fig. 4.27: Save Feedback Form

Form

Forms are question and answersheets that user can create to collect important information from user prospective leads and customers.

Notes

Once created, user can fill in the information or distribute the form as a link. User can create the information forms by adding one question at a time and each question can be of the following types:

- Checkbox
- Date and/or Time
- Multiple Choice
- Multiple Choice Checkboxes
- Option Boxes
- Free Text
- Yes/No

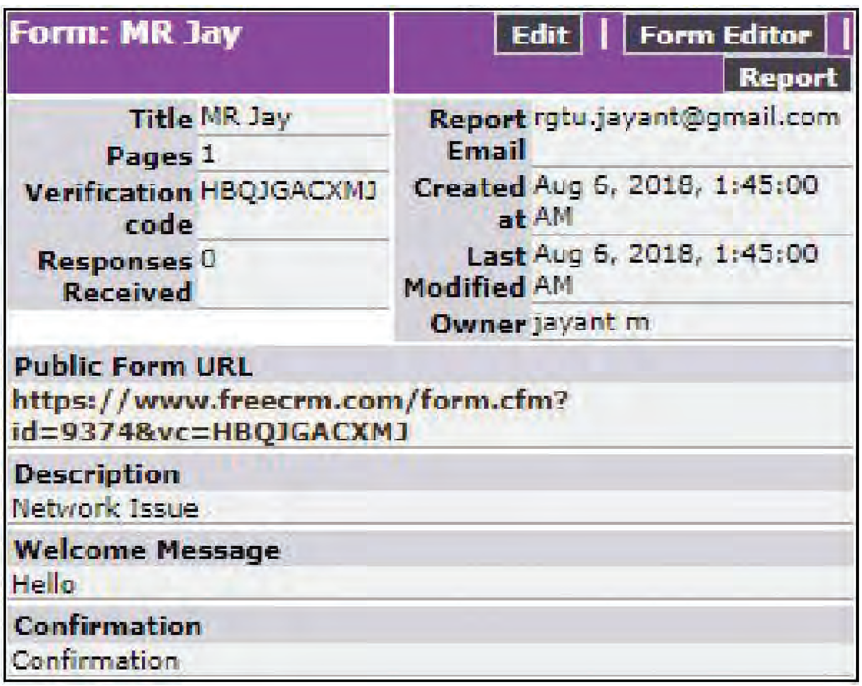
To create a form the user should follow the steps as given below.

(a) Create a new feedback form by giving user form a title, select how many pages it will have and give a short description and instructions.

(b) Select the type of question to create, such as fill in the blank, yes/no, or multiple choice.

(c) Once completed, user can then send this qualification form to user prospective leads and customers as a hyperlink or use it on calls.

After Saving



Form: MR Jay | Edit | Form Editor | Report

Title	MR Jay	Report Email	rgtu.jayant@gmail.com
Pages	1	Created at	Aug 6, 2018, 1:45:00 AM
Verification code	HBQJGACXMJ	Last Modified	Aug 6, 2018, 1:45:00 AM
Responses Received	0	Owner	jayant m

Public Form URL
https://www.freecrm.com/form.cfm?id=9374&vc=HBQJGACXMJ

Description
Network Issue

Welcome Message
Hello

Confirmation
Confirmation

Fig. 4.28: After Save Feedback Form

Report

There are seven reporting functions for this application. Reports are used to create specific views of user company's statistics and activity in a variety of areas. Custom reports can be created and saved, allowing user fine control and giving managers a top–down view of the activities of user sales staff.

Reports

Call Reports	
Call Statistics	Show call statistics
Most called contacts	Show the most contact contacts
Call by Month	Show calls by month of the year
Call by Week	Show calls by week day
Calls by Team	Show calls scheduled and completed by the team
Deal Calls	Show calls relating to deals
Task Calls	Show calls relating to tasks
Case Calls	Show calls relating to cases
Call Flags	Show call flag statistics
Call Flags by User	Show call flags by user
Calls by Time	Calls report based on the day of month, day of week and time of day.
Call by Day	Show calls breakdown by day

Support Reports	
Case Statistics	Show case statistics
All Open Cases	Show the 20 longest outstanding open cases
Closed Cases	Shows closed cases statistics
Open Cases	Shows open cases statistics
Open and Closed Cases	Show how long cases have been open or closed by each user
Cases Closed by Users	Shows cases closed by users assigned to them
Cases by Users	Show how many cases are assigned to your users
Cases Open by Users	Shows all open users's cases
Cases and Companies	Shows cases with company assignments

Company Reports	
Company Statistics	Shows company statistics
Company Countries	Show companies by country of origin
Company Deals	Show deals by company
Company Counts by Users	Show how many companies each user created
Company Categories	Show how many companies there are in each category
Company States	Show company counts by state
Company Access	Show the 30 most accessed companies
New Companies	Show the 30 newest companies added
Company By Status	Shows company by status report

Contact Reports	
Contact Statistics	Show contact statistics
Contact Countries	Show contacts by countries
Contact States	Show contact counts by state
Contact Access	Show the 30 most accessed contacts
Contact by Status	Show contacts by status report
New Contacts	Show the 30 newest contacts
Contact by Category	Show contacts by category report

Email Campaign Reports	
Email Statistics	Show email statistics
Mailouts Report	Show email campaign mailout report by status of mails
Campaign Subscriptions	Show how many contacts are subscribed and unsubscribed to your email campaigns

Generic Reports	
Duplicate Records	Find duplicate records
Tag Statistics	Show statistics regarding tag usage
Recent Notes	Show all recent notes entered

Deal Reports	
Deal Statistics	Show deal statistics
Deal Products	Show products associated with deals
Deals Predicted Closing	Show predicted closing dates for deals
Deals Created by Month	Show deals by creation time
Deal Pipeline by Stage	Show deals by stage
Deals Closed by Month	Show deals by actual closing time
Deal Pipeline by Type	Show deals by type
Deals Closed Late	Show deals that closed late
Deal Pipeline by Probability	Show deals by probability
Deal Pipeline by State	Show deals by state (Open or Closed)
Deal Contacts	Show which contacts are more prominent in your deals
Deals by Products	Show deals by their assigned products
Deals by team	Show deals by team members
Deals by companies	Show open deals by companies
Deals by source	Show deals by source
Deals Commission Report (Closed)	Show deals commission breakdowns for closed deals
Deals Commission Report (Open)	Show deals commission breakdowns for open deals

Task Reports	
Task Statistics	Show task statistics
Tasks Closed by Users	Show tasks closed by users
Open Tasks	Show tasks still open
Tasks Created by Users	Show tasks created by users
Task Deadlines	Show tasks deadlines by months
Complete Task Report	Show all task reports
Tasks by assigned users	Show tasks with assigned users

Usage and User Reports	
Usage by sections	Show the most used sections of the application
Usage Statistics	System usage statistics
Usage by week day	Show user usage by day of the week
Usage by month	Show user usage by month
Users's time online	Show how long users spend online

Fig. 4.29: Report

Setup

The Setup menu allows users and administrators to control and customise the behaviour of the CRM application.

User may import user contacts and companies with the first option. The second option, Update Organization, allows user to edit user company information.

Update Profile allows user to set a default currency, a time zone and welcome text for user team. Administrators may select all of the important functions and details for the site.

Resources are links to sites or other data and are virtual bookmarks that are shared with user team. Creating quick links to support documentation, or competitor websites is helpful to user sales and customer support staff.

Regions are assignments for user team members and allow user to model the system that fits user structure.

Setting unavailable times and dates are important for users' time management and system resource allocation. By marking out user available time, the system will let others know that user will not be an available resource for the team or customers.

Administrators can set the availability for particular regions, which is helpful in synchronising corporate communications in a distributed, multi-time zone environment.

For update profile of user, Edit the account profile and preferences for user company.

Global Account Administration	
Profile Settings	Edit the account profile settings and default preferences for your entire company
Setup Tabs	Customize Tabs
Update Organization	Edit your company's information
Billing	
Invoices	Your invoices and billing history
Credit Card Information	Edit your Credit Card details and billing contact email
Change Your Plan	Upgrade or downgrade your account plan or sign up for Voice CRM here.
Security	
Security Settings	Edit the account security settings to determine how data is shared between your users
Ownership Transfer Rules	Setup the rules that apply when transferring record ownership between users
Manage Users	Set up additional users or edit existing users
Update Login	Update your login information

Personal User Settings	
User Preferences	Your user preferences
Setup Left Menu	Customize the left menu bar
Set Unavailable Time	These are dates where you are *unavailable* (for example, on vacation)
Set Availability by Region	These are dates where you are *available* at a particular region
Pending Reminders	View (or delete) any pending reminders you have set

Data Setup	
Setup Extended Fields	Add additional fields to your companies, contacts, appointments etc.
Setup Field Sets	Custom fields: Companies, Cases, Note Type, Products, Deal Stage and Status.
Manage Tags	Remove tags from your database
Transfer Record Ownership	Move record ownership from one user to another
Customize Email Content	Customize the content of system generated emails (such as Data Confirmations)
Import	Import your contacts and companies
Export Raw Data	Export *all* your data in a set of CSV files. Its a raw dump of our database.
Backup Your Documents	Create a zip file with all your documents.
Resources	Edit your company's resources
Regions	Edit your region list
Index Extended Fields	Regenerate the index for your extended fields. This index is used whenever you peform searches or data filtering based on you extended fields for contacts and companies.
Clear Account Data	Completely delete all account data. This cannot be undone!

Fig. 4.30: Setup Option

Import

Import user contacts and companies; Update Organisation — Edit user company's information; Resources — Edit user company's resources; Regions — Edit user region list; Set Unavailable Time — these are dates where user are unavailable at all (for example, on vacation); Set Availability by Region — these are dates where user are available in a particular region.

Update Login — Update user login information; Create/Edit users — Setup more users to log in to the CRM, or edit existing ones; Setup Extended Fields — Add additional fields to user companies, contacts, appointments, etc.

Setup Field Sets — customise selection fields, such as Products, Deal Stage or Case Status.

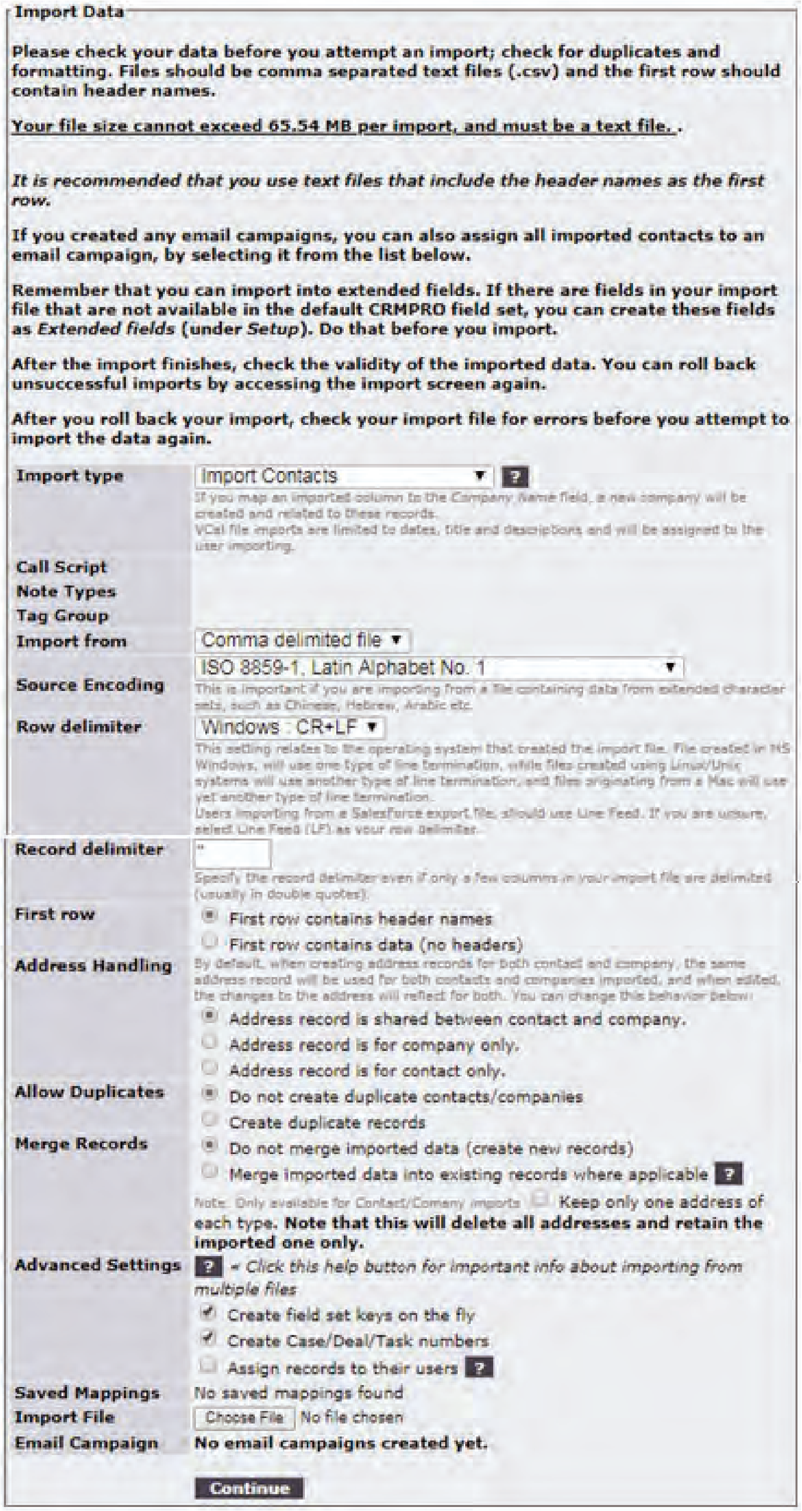


Fig. 4.31: Import Option

Profile Setup

Update Profile allows user to set a default currency, a time zone and welcome text for user team. Administrators may then select if users can share information, if it is private, or if only managers can see private information. User can also select the default design look and feel using the skins selection box, a clock mode and the amount of history shown for

Notes

user activity tracking. User may then designate start and end times for user work days and if user want to check schedules against a user's availability.

Check Your Progress

A. Multiple choice questions

1. User receives an e-mail message from a potential customer. You need to track the potential customer as a new lead in Microsoft Dynamics CRM 2011. What should you do?
   (a) Convert the e-mail message into a lead.
   (b) Create a new lead and set a connection to the e-mail message.
   (c) Create a new lead, attach the e-mail message to the lead and then save the lead.
   (d) Create a new lead from the regarding lookup of the e-mail message.
2. Which parameter is the only parameter that the Execute method takes?
   (a) Non-entity-specific request
   (b) Request class
   (c) Target property
   (d) Response class
3. What are some popular CRM software?
   (a) SAP CRM
   (b) Salesforce
   (c) Oracle CRM on Demand
   (d) All of the above
4. Which of the following is a set of prices that are charged for the product under certain circumstances?
   (a) Discount List
   (b) Price List
   (c) Products
   (d) Quote

B. Short answer questions

1. How well do users understand customers?
2. What is CRM?
3. What modules can be included in CRM?
4. What technologies should be used to develop CRM?
5. What are the benefits of CRM?
6. How does CRM help sales?
7. How do I know if my company needs a CRM?
8. How does CRM work with customer mails?
9. How can we import data to my CRM?

Unit 5

Work Management

Introduction

In the globalised economy of today, a 24×7 working environment is a reality. But this is not new to India or unique to the BPO industry. Our manufacturing sector —factories, hospitals, hotels, airlines, media, armed forces, transportation sector (trains, buses), IT industry, etc., are some of the other industries that work 24×7, with people coming and working in different shifts. The BPO industry works in a similar way. Your work hours will vary according to which part of the business you are in and the location of your client. If your client is based in New York City and you are working in Collection or Customer Service, you are more than likely to work in shifts, including a night shift. But, if your job requires paying insurance claims, you will probably be working during the day. With minor adjustments, it is possible to bring work-life balance and have a comfortable time in the BPO industry — just like any other industry that works 24×7. You can also change your work hours in a few years as you grow and build your career.

A 24×7 working environment provides various shift options and rotations. To keep things interesting and to provide opportunities for social interaction, organisations organise team outings, hobby classes, family days, festival celebrations, etc. To support the employees better, organisations also provide basic amenities like a 24-hour cafeteria, gym, ATM and advisory and counselling programmes to help you make the most of your career and life.

Voice Process

Accepting Orders

Ajay: Accepting Orders (Voice)

Name: Ajay Yadav	
Section: Voice Process	
Job Responsibility: Order-taking	

Ajay's job is to take inbound calls in the voice process. Ajay is in the order-taking department, which means customers call him to place their orders for products or services.

Ajay takes orders on the phone

- by making a note of the details of the product that the customer wants to buy.
- by logging the details into the computer.

Ways in which Ajay processes the order

- All the details are written out like a script that comes up on his computer screen.
- The Customer Relationship Management or CRM software on the computer system gives him this script.
- He reads out the questions from the computer screen over the phone and types in the customer's responses into the CRM. Then, he logs the order details of the customer into the computer.

Skills required for accepting orders

- Ability to multi-task
- Listening
- Reading
- Typing speed
- Speaking
- Courtesy

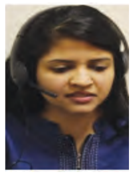
- Politeness in tone
- Patience

Tip

- Concentration is needed as you will have to read, speak, listen and type simultaneously, while taking the order from customers. Practice will help you take the orders quickly.

Customer Service

Sanaya Sharma: Customer Service (Voice)



Name: Sanaya Sharma

Section: Voice Process

Job Responsibility: Customer Service

Sanaya has to take inbound calls for customer service. She takes about 200 calls a day. There are different types of customers that she needs to handle, some who complain, some who are difficult, a few others who expel their frustration over the phone. She has to manage irate customers by remaining calm. Then she must be ready to take the next call as if nothing happened!

Skills required

- Empathy
- Patience
- Politeness in tone
- Courtesy
- Typing

Tips

- Always remember that the customer is angry because of the situation they are in and not with you.
- Always keep cool.

Telesales

Rishik Mittal: Telesales (Voice)

Name: Rishik Mittal

Section: Voice Process

Job Responsibility: Tele-selling

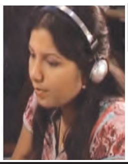
Rishik makes outbound calls to customers for sales. He has to make calls to customers who may or may not want the company's services.

Most customers are busy, not interested and may get irritated with telesales calls. In telesales timing is very important because unlike in inbound calls, here you are imposing on the customer's time. Rishik needs tact to cut the ice with the customer.

Skills required

- Right timing
- Product knowledge
- Neither be too aggressive nor too submissive
- Politeness in tone
- Courtesy
- Typing

Collection



Name: Khushi Agrawal

Section: Voice Process

Job Responsibility: Collection

Khushi's main job is to collect pending payment from customers, over the phone. These days, it has become easy to get loans. But getting customers to pay their monthly installments is not easy. Customers may disconnect the call, or they may be rude. The challenge is to give them simpler installments and skillfully tackle them for payment.

Skills required

- Numerical
- Analytical
- Tact
- Patience
- Politeness in tone
- Courtesy
- Typing

Non-voice Process

Data Entry

Bela Bose: Data Entry (Non-voice)

Bela is from the non-voice process. She does a lot of data entry work on the computer. It is perfect for her as she is a little shy and not comfortable over the phone. Along with data entry, she also handles e-mail correspondence with customers.

Name: Bela Bose

Section: Non-Voice Process

Job Responsibility: Data entry

Skills required

- Typing speed of 45 words per minute with 95% accuracy, which is typically the industry norm.

Generic Competence

Skills required

- Listening
- Speaking including talking clearly, not using technical jargon
- Ability to speak in English fluently
- Ability to speak in natural Hindi accent
- Probing skills or asking the right questions
- Suggesting, recommending and advising
- Phone etiquette

In addition to the above, to succeed at work, you need to be motivated, well-groomed, disciplined and develop a positive attitude.

Standard Organisational Policies

As a CSR, you will have to follow company policies. These policies will not only vary from one organisation to the other but will also vary from the product or service you are catering to. Here is a list of standard policies you must follow. Any communication with the customers has to be in line with the company's training and business policies:

- You must sign a bond that you will work under the guidelines Telecom Regulatory Authority of India.
- You must ensure that whatever data are being provided to them must be used only to make business calls.
- You should be professional all the time during the business calls.
- The language used during the call should be proper and clear.

Notes

- You should not mislead the customer to sell the product.
- You must pass the quality check done from a quality evaluator and must implement the given feedback immediately.
- You should not share any company specific data and details, in case any customer requests anything like this.
- You should follow the right process of putting the customer on hold or when returning to the call.
- You should not ask the customer's personal details and must also not share their personal details under any circumstances.
- You must report on time and must ensure that the workstation is all set to start work.
- You must follow the dress code of the organisation.
- You must sign the terms of the offer given.
- The first 3–6 months will be treated as probation period and job would be confirmed post the satisfactory probation period.
- You may be required to undertake other duties from time-to-time as the company may reasonably require. If the duties or the position with the company change for any reason, then the terms of this contract will continue to apply.
- During the course of your employment you are expected, at all times, to maintain professional and responsible standards of conduct or behaviour, attendance and performance.
- The company at any time during the terms of your employment may require undergoing medical check-ups to assess your fitness.
- The company may require you to relocate to other office or premises occupied by the company both in India and outside.
- You may be required to travel on company business as required for the proper performance of your duties both in India and outside.
- All payments received by you from the company will be subjected to statutory bonus as required by the law.

- The company will contribute towards all statutory benefits as required by the laws applicable in India.
- You are eligible to be considered for a discretion bonus in accordance with the relevant bonus plan in place from year-to-year relevant to your role at that time.
- The company holiday runs between 1 April and 31 March. You will be entitled to annual leave in accordance with the company leave policy, which is as per the law (governing body).
- You are employed to work 45 hours per week inclusive of all rest or meal breaks as required by law, on a shift basis.
- At any time both the parties can part ways provided 30 days' notice within the probation period and 60 days after the probation period is served.
- You must not comment on the caste, creed, religion, colour or any kind of discrimination (physical or medical).
- You should end the call properly and be thankful to the customer for answering the call, irrespective of sale made or not.
- While making outgoing calls, you must ensure that the phone is in perfect condition and CSR is loud and clear over the call.
- You must ensure that you meet the AHT (average handling time) defined by the company or the process.
- You should have proper information stored in an easy to access folder or file.
- You should be well-equipped and trained with the questions the customer may ask.
- While on the call you must follow the proper hold/mute procedure as defined by the company.
- You should have proper knowledge of the product you are going to sell and should not mislead the customer in order to make a sale.
- CSR must sound confident, professional, clear and crisp.

Notes

NOTES

STANDARD ORGANISATIONAL PROCEDURES

On your organisation and particular process, you will be asked to establish contact with the customer. Each organisation has standards, policies, procedures and guidelines for making telesales calls. Your manner of speaking, introduction, greetings, etc., will largely depend on what the organisation wants to portray or reflect.

Let's take a look at the standard organisational procedure for establishing contact with the customer.

Develop a Professional Greeting

Don't just say hello and jump into your telephone presentation without taking a breath or allowing the other party to participate. Your greeting should be formal. Begin with Mr, Mrs or Ms, as in Good morning, Mr Sharma or Good evening, Mrs Rai. Everyone else says, Hello. Be different. Be professional.

Introduce Yourself and Your Company

'My name is Ajay Yadav with ABC Company. We're a local firm that specialises in helping businesses like yours to save money.'

Don't get too specific yet. Don't mention your product. If you do, that allows the other party to say, 'Oh, we're happy with what we've got. Thanks anyway,' and hang up. By keeping your introduction general, yet mentioning a benefit, you'll pique your prospective client's curiosity and keep them on the line longer.

Express Gratitude

Always thank the potential client for allowing you a few moments in his busy day. Tell them that you won't waste a second of his time. 'I want to thank you for taking my call. This will only involve a moment of your time so you can get back to your busy schedule.' Don't say that you'll 'just take a moment'. The feeling evoked by them hearing that you'll take anything from them will put them off.

State the Purpose of Your Call

It is best if you can provide the purpose within a question. 'If we can show you a way to improve the quality of your product at a lower cost, would you be interested to know more?' This is very likely to get a 'yes' response. At this point, you're ready to start selling an opportunity to meet this person or to get their permission to provide them with more information. You're not selling your product yet — you're selling what your product will do for them.

NOTES

Schedule a Meeting

Get a confirmation to meet, either in person or to tele-conference to get the information you need in order to give a solid presentation. If they are so interested that they want to do it right then and there, that's fine.

If a face-to-face meeting is the most appropriate next step, use the alternate-of-choice questioning strategy. Offer them two time schedules, 'Mr/Mrs Jain, I can pop by your office at 2:15 pm today to discuss this further. Or would 9:45 am tomorrow better suit your schedule?' You didn't say, 'When can we meet?' When you use the alternate of choice, you take control of getting the appointment. And note: Asking for an off-hour gets you noticed. There's something about setting a meeting at an off-hour that says you're a salesperson who'll be punctual and respect your prospective client's time. Try it.

Say Thanks

Thank them for their time today and for the upcoming appointment. Reconfirm the date, time and location of the appointment. Ask for directions if you need them. Tell them how much preparation you'll do in order to make the best use of the time you'll share. Give them your contact information this way: 'If anything else comes to mind that I should be aware of prior to our meeting, please contact me at (+91-XXXX).'

Follow up

If your meeting is more than a few days in the future, send a letter of confirmation immediately. If the meeting is next day, send an e-mail confirmation. Keep it short and upbeat.

You will learn about these procedures and guidelines in more detail in the ensuing sessions.

Notes

Check Your Progress

A. Multiple choice questions

1. If you are in customer service, which of these skills is a MUST for you?
   (a) Empathy
   (b) Analytical skills
   (c) Numerical skills
   (d) Selling skills
2. Bela is in non-voice process. Which is the skill she need NOT be good at?
   (a) Typing speed
   (b) Reading skills
   (c) Writing skills
   (d) Speaking skills
3. Ajay is in telesales. He is fluent in Hindi. However, his mother tongue is Bhojpuri. What is the one thing he must consciously avoid while speaking to his customers'?
   (a) Talking about his home town.
   (b) Talking about the product he is selling.
   (c) Mother tongue influence in speech.
   (d) Talking about his company.
4. How should a CSR greet customers?
   (a) Cheerful greeting every time.
   (b) Cheerful greeting some time.
   (c) Never greets cheerfully.
   (d) Cheerful greeting every morning.

B. Match the columns

Job Profile		**Job Role**
A. Customer service	a.	Takes as well as makes calls to recover dues and outstanding payments from customers
B. Data entry	b.	Has to take orders from customers, log them into the system
C. Accepting order	c.	Has to attend to enquiries, complaints, demands and requests from customers
D. Telesales	d.	Has to type at a speed of 45 words per minute with 95 per cent accuracy
E. Collection	e.	Makes calls to sell a product or a service

Unit 6

Workplace Safety and Hazards

Introduction

Workplace safety is major part of every organisation. An organisation should ensure that all employees have a safe work environment to prevent any injury while on the job. Workplace accident, dispute, is a cost to the organisation as well as to the injured individuals and their families. In any organisation, every employee and the management is legally responsible to make it a safe workplace. Working together to ensure proper health and safety helps in improving the work environment and the productivity of the organisation, as employees take the responsibility for their own health and safety rather than depend on the 'safety officer' or management.

Risk management is a proactive process that helps in responding to change and facilitates continuous improvement in any business. It should be planned, systematic and cover all reasonably predictable hazards and associated risks.

As a customer service representative (CSR), one spends long hours in front of the computer using earphone and continue sitting on the chair. A CSR who habitually uses a computer as an important part of their work, come across certain occupational hazards.

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These harzards include health issues like back pain, eye strain and stress. In order to minimise the impact of occupational hazards, there are certain precautions that should be followed, which are as follows:

- Provide sufficient space for the CSR or the helpdesk operator to move comfortably.
- Provide lighting that is adequate with suitable contrast between the screen and background.
- Avoid glare and reflections on the screen.
- Have windows fitted with adjustable coverings to alter the sunlight level.
- Give enough space when a workstation is shared with more than one person.

An accident is an unplanned, uncontrolled, or unforeseen event resulting in injury or harm to people and damage to goods, such as a person falling down and getting injured or a glassware item breaking upon being knocked over. An emergency is a serious or crisis situation that needs immediate attention and action. For example, a sudden outbreak of fire in the organisation needs immediate attention.

Prevention of Disasters and Risk Events

In relation to workplace safety and health, hazard can be defined as any source of potential harm or danger to someone or any adverse health effect produced under certain condition.

Many hazards and their associated risks are well known and have well-established and accepted control measures. In these situations, the second step to formally assess the risk is unnecessary. If, after identifying a hazard, you already know the risk and how to control it effectively, you can implement the controls without undertaking a risk assessment.

Some of the basic safety rules are as given below.

Fire Safety

Employees should be aware of all emergency exits, including fire escape routes, of the office building and also the locations of fire extinguishers and alarms.

Falls and Slips

To avoid falls and slips, all things must be arranged properly. Any spilt liquid, food or other items must be immediately cleaned to avoid any accidents. Make sure there is proper lighting and all damaged equipment, stairways and light equipment are repaired immediately.

First Aid

Employees should know about the location of first aid kits in the office. First aid kits should be kept in places that can be reached quickly. These kits should contain all the important items for first aid, for example, all the things required to deal with common problems, such as cuts, burns, headaches or muscle cramps.

Security

Employees should make sure that they keep their personal things in a safe place.

Electrical Safety

Employees must be provided the basic knowledge of using electrical equipment and common problems. Employees must also be provided instructions about electrical safety, such as keeping water and food items away from electrical equipment. Electrical staff and engineers should carry out routine inspections of all wiring to make sure there are no damaged or broken wires.

Accidents and Emergencies

Each organisation or chain of organisations has procedures and practices to handle and report accidents and take care of emergencies. Although you will find most of these procedures and practices common across the industry, some procedures might be modified to fit a particular type of business within the industry. For example, procedure to handle accidents caused by slipping or falling will be similar across the industry. You need to be aware of the general procedures and practices as well as the ones specific to your organisation.

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Following are some of the guidelines for identifying and reporting an accident or emergency:

- **Notice and correctly identify accidents and emergencies:** You need to be aware of what constitutes an emergency and what constitutes an accident in an organisation. The organisation's policies and guidelines will be the best guide in this matter. You should be able to accurately identify such incidents in your organisation. You should also be aware of the procedures to tackle each form of accident and emergency.
- **Get help promptly and in the most suitable way:** Follow the procedure for handling a particular type of accident and emergency. Promptly act as per the guidelines. Ensure that you provide the required help and support as laid down in the policies. Do not act outside the guidelines and policies laid down for your role even if your actions are motivated by the best intention. Remember that only properly trained and certified professionals may be authorised to take decisions beyond the organisation's policies and guidelines, if the situation requires.
- **Follow company policies and procedures for preventing further injury while waiting for help to arrive:** If someone is injured, do not act as per your impulse or gut feeling. Go as per the procedures laid down by your organisation's policy for tackling injuries. You need to stay calm and follow the prescribed procedures. If you panic or act outside the prescribed guidelines you may end up further aggravating the emergency situation or putting the injured person in further danger. You may even end up injuring yourself.
- **Act within the limits of your responsibility and authority when accidents and emergencies arise:** Provide help and support within your authorised limit. Provide medical help to the injured only if you are certified to provide the necessary aid. Otherwise, wait for the professionals to arrive and give necessary help. In case of emergencies also, act within your authorised limits and let the professionals do the

task allocated to them. Do not attempt to handle any emergency situation for which you do not have formal training or authority. You may end up harming yourself and the people around you.

- **Promptly follow instructions given by the senior staff and the emergency services**: Provide necessary services as described by the organisation's policy for your role. Also, follow the instructions of senior staff that is trained to handle particular situations. Work under their supervision when handling accidents and emergencies.

Types of Accidents

The following are some of the commonly occurring accidents in organisations:

- **Trip and fall:** Employees can trip on carelessly left loose material and fall down, such as tripping on loose wires, goods left on the aisles, elevated threshold. This type of accident may result in simple bruises to serious fractures.
- **Slip and fall:** People may lose foothold on the floor and stairs resulting in injuries. Slips are mainly due to wet floors.

Fig.6.1: Commonly occurring accidents in organisations

Handling Accidents

Try to avoid accidents in your organisation by finding out all the potential hazards and eliminating them. If a colleague in the organisation is not following safety practices and precautions, inform your supervisor or any other authorised personnel. Always remember that one person's careless action can harm the safety of many others in the organisation. In case of an injury to a colleague due to an accident in your organisation, you should do the following:

- Attend to the injured person immediately. Depending on the level and seriousness of the injury, see that the injured person receives first aid or medical help at the earliest. You can give medical treatment or first-aid to the injured person only if you are qualified to give such treatment. Let trained authorised people give first aid or medical treatment.

- Inform your supervisor about the accident, giving details about the probable cause of the accident and a description of the injury.
- Assist your supervisor in investigating and finding out the actual cause of the accident. After identifying the cause of the accident, help your supervisor to take appropriate action to prevent similar accidents in future.

Health in Occupational Workstation

As per the World Health Organization (WHO), health is a "State of complete physical, mental, and social well-being, and not merely the absence of disease or infirmity." This means being healthy does not simply mean not being unhealthy — it also means you need to be at peace emotionally, and feel fit physically. For example, you cannot say you are healthy simply because you do not have any physical illness like a cold or cough. You also need to think about whether you are feeling calm, relaxed and happy.

Some common health issues are

- allergies,
- depression and anxiety and
- cough, cold and sore throat.

Potential Sources of Hazards in an Organisation

- **Using computers:** Hazards include poor sitting postures or excessive duration of sitting in one position. These hazards may result in pain and strain. Making the same movement repetitively can also cause muscle fatigue. In addition, glare from the computer screen can be harmful to the eyes. Stretching at regular intervals or doing some simple yoga in your seat can mitigate such hazards.
- **Handling office equipment:** Improper handling of office equipment can result in injuries. For example, sharp-edged equipment if not handled properly, can cause cuts. Staff members should

be trained to handle equipment properly. A relevant manual should be made available by the administration on handling equipment.

- **Handling objects:** Lifting or moving heavy items without proper procedure or techniques can be a source of potential hazard. Always follow approved procedure and proper posture for lifting or moving objects.
- **Stress at work:** In today's organisations, you may encounter various stress-causing hazards. Long working hours can be stressful and so can be aggressive conflicts or arguments with colleagues. Always look for ways for conflict resolution with colleagues. Have some relaxing hobbies for stress against long working hours.
  - (a) Mentally healthy workplaces benefit all employees, their families, organisations and the broader community.
  - (b) Mentally healthy workplaces promote wellbeing, minimise work place stress, and are environments where staff with poor mental health feel safe to talk about their condition, are supported and have equal opportunities.
  - (c) Everyone has a role to play in creating a mentally healthy workplace — it is a shared responsibility.
- **Working environment:** Potential hazards may include poor ventilation, chairs and tables of inappropriate height, hard furniture, poor lighting, staff unaware of emergency procedures, or poor housekeeping. Hazards may also include physical or emotional intimidation, such as bullying or ganging up against someone. The staff should be made aware of organisation's policies to fight against all the given hazards related to a working environment.

General Evacuation Procedures

Each organisation has its own evacuation procedures listed in its policies. An alert employee, who is well-informed about evacuation procedures, can not only save themself, but also help others in case of

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an emergency. Therefore, you should be aware of these procedures and follow them properly during an emergency evacuation. Read your organisation's policies to know about the procedures endorsed by it. In addition, here are a few general evacuation steps that will always be useful in such situations:

- Leave the premises immediately and start moving towards the nearest emergency exit.
- If possible, assist any person with disability to move towards the emergency exit. However, do not try to carry anyone unless you are trained to do so.
- Keep yourself light when evacuating the premises. You may carry your hand-held belongings, such as a bag or briefcase as you move towards the emergency exit. However, do not come back into the building to pick up your belongings unless the area is declared safe.

Fig. 6.3: Some of the Common Safety Signs

- Do not use escalators or elevators (lifts) to avoid overcrowding and getting trapped, in case there is a power failure. Use the stairs instead.

- Go to the emergency assembly area. Check if any of your colleagues is missing and immediately inform the personnel in charge of emergency evacuation or your supervisor.
- Do not go back to the building that you have evacuated till you are informed by authorised personnel that it is safe to go inside.
- After discussing the course content, ask candidates to prompt the key points on their understanding of the evacuation procedures at their current organisation.

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Safety Guidelines Checklist

- Shut down all machines before leaving for the day.
- Do not use equipment if it smokes, sparks or looks unsafe.
- Do not smoke in 'No Smoking' areas.
- Report any unsafe condition or acts to your supervisor. These could include:
  - — Slippery floors
  - — Missing entrance and exit signs
  - — Poorly lit stairs
  - — Loose handrails or guard rails
  - — Loose, open or broken windows
  - — Dangerously piled supplies or equipment
  - — Unlocked doors and gates
  - — Electrical equipment left operating
  - — Open doors on electrical panels
  - — Blocked corridors
  - — Blocked fire extinguishers
  - — Blocked fire doors
  - — Smoke in non-smoking areas
  - — Roof leaks
  - — Safety devices not operating properly

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Check Your Progress

A. State whether the following statements are True or False

1. The employer and employees are responsible for workplace safety.
2. Any injury at work should be reported to the supervisor immediately.
3. No matter how big or small the injury; the injured person should receive medical attention.
4. While working with machines and equipment, employees must follow the safety guidelines set by the company.
5. At any office, the first aid kit should always be available for use in an emergency.
6. It is optional to participate in random fire drills conducted by the offices from time-to-time.
7. The 'Wet Floor' sign is not needed and causes problems for people.
8. It is okay to place heavy and light items on the same shelf.
9. There is no need to train employees on how to use the fire extinguisher. They can operate extinguishers following the instruction written on the extinguisher case, when needed.
10. The cleaning supplies, especially chemical products, can be left in the bathrooms or in any of the cupboards in the office.
11. An accident is a serious or crisis situation that needs immediate attention and action.
12. Emergency procedures have been devised to keep everyone safe.
13. A hazard is any situation that has the potential to cause injury, illness or death.
14. If no notification is made of an injury sustained, compensation can be obtained.
15. To reduce injury, a risk control process accompanied by hazard-management procedures needs to be established.
16. Safety signs can prevent accidents.
17. The duty of care at the workplace is the responsibility of the employer only.
18. When providing a safe working environment for the staff, employers must eliminate all risks to health and safety.

B. Multiple choice questions

1. Which of the following are appropriate actions for handling accidents and emergencies? Select the two correct actions.
   (a) You should give medical treatment or first-aid to the injured even if you are not properly trained in such procedures because such treatments should be given promptly.
   (b) Take decisions beyond the organisation's policies and guidelines if the situation requires.
   (c) Get help promptly and in the most suitable way.
   (d) Follow instructions given by senior staff and the emergency services.

2. What is the first action to take when approaching the scene of an accident?
   (a) Check for signs of life.
   (b) Wait for the emergency services.
   (c) Attend to the most serious injury.
   (d) Make sure the area is safe to enter.

3. What does a risk assessment tell you?
   (a) How to report accidents.
   (b) The working hours of the organisation.
   (c) Where the first aid box is and the first-aiders.
   (d) How to do the job safely.

4. ______________ have a duty to work safely under the Health and Safety at Work Act, etc.
   (a) Employers only
   (b) Employees only
   (c) The general public
   (d) All people at work

5. What is a hazard?
   (a) Anything with the potential to cause harm.
   (b) Where an accident is likely to cause harm.
   (c) The likelihood of something going wrong.
   (d) An accident waiting to happen.

6. Accidents are best prevented by __________________.
   (a) the Health and Safety Executive.
   (b) employers inspecting workplaces.
   (c) people being aware of hazards and working in a safe manner.
   (d) the Managing Director.

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C. Match the columns

Type of Emergency	Example
A. Medical	a. Earthquake
B. Substance	b. An expectant mother in labour
C. Structural	c. Chemical spills
D. Security	d. Power failure
E. Natural disaster	e. Armed robbery

Answer Key

Unit 1: IT/ITeS Industry

A. Multiple choice questions

1.a 2.c 3.c 4.a 5.c

B. State whether the following statements are State whether the following statements are True or False

1.T 2.F 3.F 4.T 5.T 6.T 7.T

C. Fill in the blanks

1.$225,2020 2.four 3.KPO 4.BPO

D. Write the full form of the following acronyms

1. Information Technology
2. Information Technology enabled Services
3. Internet Service Protocol
4. Busines Process Outsourcing
5. Business Process Management
6. Customer Relationship Management
7. Knowledge Process Outsourcing

Unit 2: CRM Domestic Voice Representative Training

A. Multiple choice questions

1.a 2.c 3.a 4.a 5.c

Unit 3: Outbound Calls: Interacting with Customer

A. Multiple choice questions

1.b 2.c 3.a 4.d 5.a 6.a

Unit 4: Using CRM Application: FreeCRM

A. Multiple choice questions

1.c 2.c 3.d 4.a

Unit 5: Work Management

A. Multiple choice questions

1.d 2.d 3.c 4.a

B. Match the columns

A.c B.d C.b D.e E.a

Unit 6: Workplace Safety and Hazards

A. State whether the following statements are True or False

1.T 2.T 3.T 4.T 5.T 6.T 7.F 8.F 9.F
10.F 11.T 12.T 13.T 14.F 15.T 16.T 17.F 18.T

B. Multiple choice questions

1.b and c 2.c 3.b 4.d 5.d 6.c

C. Match the columns

A.b B.c C.d D.e E.a

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GLOSSARY

Abandoned after Threshold: *a key performance indicator (KPI) computing number of calls disconnected after waiting in queue beyond a previously established time threshold.*

Abandoned before Threshold: *a key performance indicator (KPI) measuring number of calls disconnected before reaching a previously established time threshold.*

Abandoned Call: *a phone call that has been received by a call center's communications switch, but is terminated by the caller before any conversation begins*

Abandonment Rate: *the percentage of callers who hang up before a Brand Specialist answers, or before they make a selection in an interactive voice response (IVR) unit. The inverse of answer rate.*

Activity Codes: *codes that indicate the state of a Brand Specialist that are usually initiated by the CSR.*

Adherence: *also known as compliance, adherence measures the ability of a CSR to stay committed to their schedule. Also used to measure the CSR's ability to adhere to a script, message, policy, practice or process as trained.*

After-call Work (ACW): *the CSR activity that directly follows a call, e-mail, chat, social media or SMS inquiry. ACW encompasses data-entry, activity codes, dispositions, form completion and post-call communication.*

Agent: *also known as a telephone/customer service representative (CSR). An agent handles customer interactions and contacts in the call center.*

Announcement: *a pre-recorded directive played to callers. May include pre-interactive voice response brand promotions, as an example.*

Answer Rate: *number of calls answered by CSRs in comparison to the number of calls offered.*

Answer Supervision: *the signal sent by the automatic call distributor (ACD) or other device to the local or long distance carrier to accept a call and begin applying long-distance charges, when applicable.*

Apps: *software applications for mobile devices that allow users to perform particular functions. Brands and e-commerce companies, for instance, provide apps to customers to facilitate purchases and service.*

Architecture: *the fundamental structure of a system. This establishes the working of all the components necessary to the system and how they are integrated.*

Auto Available: *system configuration to ensure CSRs are automatically made available after wrapping up a call and disconnecting.*

Auto Wrap-up: *directly related to auto available, auto wrap-up conversely puts a Brand Specialist into after-call work as opposed to available. are required to put themselves back into available states promptly after completing after-call work.*

Automated Attendant: *a telephone processing system that offers callers a recorded menu of choices designed to direct their call to the desired party. For instance, a recording will direct the caller to press one for customer service, press two to place an order and then connect them to the party they have chosen. See interactive voice response.*

Automatic Call Distributor (ACD): *a specialised phone system used for handling incoming calls. The ACD recognises an incoming call and scans for predetermined identifying information. This information is cross-referenced against a database of call routing instructions and distributes the call accordingly.*

Available State: *describes a CSR's status while signed into the automatic call distribution (ACD) system and ready to take a call.*

Available Time: *status in which a CSR is able to take calls.*

Average After-call Work Time (AWT): *also known as not-ready time, this is the average amount of time CSR work on customer accounts after ending a call, thus being unavailable to answer another call.*

Average Call Value: *total revenue divided by total number of calls for a given period of time.*

Average Contacts Per Hour: *the number of contacts that a CSR handles divided by the number of hours the CSR. works.*

Average Delay of Delayed Calls (DEADLY): *the average wait callers experience when awaiting connecting with a CSR.*

Average Delay to Abandon: *the average time callers wait before the call is abandoned.*

Average Delay to Answer: *metric used to calculate the average time a call remains in the queue until a CSR has picked it up. This is also called average speed of answer.*

Average Handle Time (AHT): *it shows the average time an operator spends in call-related activities, including a conversation, hold time, and any after-call activities and administration. It is calculated by using the following formula:*

$$\frac{\text{(Talk Time + Hold Time + After Work)}}{\text{Total number of handled calls}} = \text{ATH}$$

Blockage: *a scenario in which phone lines or other communication channels are filled to capacity with in-progress and queued contacts, potentially causing additional inbound contacts to be blocked.*

Blocked Call: *a call that is unable to be completed because of a busy condition.*

Business Process Outsourcing (BPO): *it is a process that involves delegating a specific business process' operations and responsibilities to a third-party service provider, in order to optimise internal operational costs related to HR, technologies, knowledge base, etc. The main advantage of BPO is to increase company flexibility, as well as optimise cost- and time efficiency.*

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Business-to-Business (B2B): *describes inbound and/or outbound contacts that are generally between businesses.*

Business-to-Consumer (B2C): *a term used to describe inbound and/or outbound contacts that are primarily between an enterprise and an individual consumer.*

Call Blending: *the method of organising the inbound/outbound flow of calls, as well as e-mails, chats and other interactions, to a set of CSRs. Contact blending can be accomplished manually or by means of automated systems that route the contacts to the CSRs within a specified skillset utilised to improve efficiency.*

Call-by-Call Routing: *in accordance with real-time conditions, call-by-call routing is the method of directing calls to the optimal destination. See percent allocation and network inter-flow.*

Call Center: *an operation combining human, technical and physical resources to field inbound and/or place outbound phone calls. Call centers support a number of different industries and functions, and often handle contacts via channels beyond the telephone, including e-mail, chat, social media and SMS. Call centers deploy technological solutions and operational processes to distribute contacts to teams of CSRs, often located in one or more locations.*

Call Closing: *the end of a call between a customer and agent, or CSR, which may include elements on the agent's part such as a thank you and a question of whether there is anything more they can do to assist.*

Calls Handled: *a variable in call center metrics that represents the volume of calls answered from the queue before being dropped.*

Calls in Queue: *a real-time report on the number of calls received by the automatic call distribution (ACD) system but not yet connected to a CSR.*

Chat: *like an instant message system, this allows any logged-in computer CSR and customer to have a written conversation online and in real-time.*

Client and Server Architecture: *an arrangement of computers and computer systems that all share an infrastructure in which their capabilities and devices are combined.*

Completed Call: *a call that has undergone total treatment by a CSR.*

Computer Simulation: *used to predict a future occurrence, usually quantitatively, using multiple variables. Designed to test solution outcomes based on possible or probable events.*

Customer-centric: *a business strategy that is concentrated on the customer's needs and satisfaction.*

Customer Relationship Management (CRM): *the strategy of identifying customer needs, improving customer interactions and customising contacts, sales approaches and automation to provide optimum service to each type of customer to maximise the bottom line benefits to the organisation. It is a broad term that takes into* *account people, processes and technology related to the acquisition and retention of customers, and the maximisation of the value of each customer relationship.*

Customer Satisfaction: *the degree to which a customer feels their expectations have been fulfilled by a company's products and services.*

Customer Service: *working on behalf of and for the satisfaction of a customer.*

Customer Service Representative (CSR): *one who handles customer calls and contacts. He or she answers any inquiries, dissatisfaction or support calls. Also known as CSR or agent in a contact center.*

Dashboard: *a display of data indicating an overview of key performance indicators. A collection of statistics measuring performance aggregated for viewing to identify insights.*

Data Directed Call Routing: *the process whereby an automatic call distributor (ACD) can route a call based on data provided by a caller and matched with information that resides in a separate data system. For example, when a caller inputs an account number on the keypad of their phone, the number is sent to a data system, where it is matched to existing data. Once identified and validated, the call is distributed to a CSR group specifically skilled to handle that account or call type.*

Database: *a software application that allows for the storing and compilation of data collected over time.*

Delay Time: *refers to the time callers are waiting for a CSR to connect and answer. During this time the caller may be listening to delay announcements. This measurement does not include the time they spend interacting with an automated attendant.*

Desktop Applications: *Software that facilitates tasks necessary for an enterprise to function. some desktop applications may include applications to check inventory, order history, billing history, shipment tracking, as well as e-mail, chat, word processing and database programs.*

E-commerce: *also known as electronic commerce. Trade carried out via an electronic network, mainly the Internet.*

Email: *messages distributed by electronic means from one computer user to one or more recipients.*

Federal Communications Commission (FCC): *this government organisation regulates interstate communications.*

Handle: *a handle, or a nickname, is a public username on the internet. Twitter is one of the popular social media sites that uses handles. To mention another Twitter user in a post, use the @ symbol followed by their handle, or username.*

Handled Call: *when a CSR receives and handles a call.*

Handle Time: *the time a CSR spends taking a call, doing after-call work, handling any necessary and extraneous details, and the time it takes for the technology to process the work.*

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Help Desk: *a call centre typically set up to handle calls in support of a product or service. Used most often to describe the customer support operation of computer software or hardware suppliers.*

Idle Time: *time that is not spent on a call or doing after-call work. Expressed as a percentage of logged in time.*

Inbound: *incoming calls, e-mails, chats, social media or SMS inquiries that are initiated by customers and prospects.*

Inbound Sales: *sales opportunities that are initiated by incoming calls, e-mails, chats, social media or SMS inquiries from customers and prospects.*

Incoming Call Center Management: *the recruiting and selection of an agreed number of experienced CSRs along with the support of ample technological resources to handle a forecasted workload qualitatively.*

Information Technology (IT): *involves computer systems and applications, especially their augmentation, establishment and implementation.*

Interactive Voice Response (IVR): *an automated retrieval and processing device that provides information to callers via telephone keypad signaling and/or voice recognition. The response may be a recorded, artificial or synthesised voice. Common applications include bank by phone, check on my order and store locator.*

Interflow: *calls that are manually or automatically rerouted from the contact center to a different site. This usually occurs when an automatic call distribution (ACD) group cannot handle every call coming in due to an excessive amount of calls. See overflow and intraflow.*

Outbound: *contacts made by CSR to reach customers and prospects. Includes calls, e-mails and chats. The opposite of inbound.*

Outsourced Call Center: *outsourced call center refers to the business strategy of partnering with an external company to manage customer contacts. The outsourced call center may reside internally, externally or virtually depending on the needs of the parent company. The benefits of outsourcing include delegating the costly and time-consuming efforts dedicated to hiring, training, quality assurance and staffing, while creating the opportunity to focus your time on customer service strategy, insights and the performance of your business.*

Outsourcing: *contracting with an outside company to handle some or all of an organisation's contacts with customers and prospects.*

Procurement: *the act of acquiring or buying goods or services from an external source, often by a bidding process.*

Queue: *sequencing process where a call, e-mail, chat, social media or SMS inquiry is held until a CSR is available to accept the interaction.*

Received Calls: *calls that are received and taken by a trunk, which can either be answered by a CSR or abandoned.*

Recorded Announcement: *a preplanned announcement that a caller will hear, usually while waiting in queue. The message may provide* *general information about products or services, indicate heavy call volume, provide estimated wait time, or request callback during off-peak hours. Recordings can also be used before a call connects to a CSR previewing what may be discussed and what information the caller may need to have ready once connected.*

Response Time: *the time it takes to respond to a request for service. Response time can refer to contacts that do not have to be handled immediately, such as email, and can be expressed as follows: 99 percent of contacts handled within X minutes or hours.*

Schedule: *the specified time an employee is required to clock in, or be on duty, to handle contacts. The assigned days and hours an employee works.*

Script: *a written document used to assist a CSR in presenting information about products and services, responding to FAQs and resolving customer care issues when communicating with a customer or prospect. Scripting assists the CSR speak in a language that reflects the brand, ensures a logical progression through the call and helps them focus on the reason for the call. May also be used with e-mail, chat or social media.*

Service Level: *conveyed as the speed of answer, service level accounts for the percentage of calls to be answered within a specified number of seconds. Often reflected as a percentage.*

Service Level Agreement: *an interdependent agreement entered into by two or more organisations.*

Service Quality: *how well a call, e-mail, chat, social media or SMS inquiry is handled by a CSR. Consistency, amiability, greeting and the ability to conclude a call are all factors of service quality.*

Short Message Service (SMS): *an electronic communication transmitted and received by cellular phone.*

Supervisor: *the person that typically has first-line responsibility for the management of a group of CSR. Responsibilities may include monitoring, measuring performance, coaching, assisting with difficult or escalated calls, training and scheduling tasks.*

Talk Time: *the time between when a Brand Specialist answers a call and when they disconnect.*

Tech Support (Technical Support/Help Desk): *assisting the customer in resolving a range of technological issues, such as troubleshooting technology and or maintenance of software systems in an effort to resume continuity and maximise technical performance.*

Teleconferencing: *the ability to conduct a conference or business meeting with two or more people who are not near each other. A telecommunications system that includes a phone conference line or video keeps a business in contact with physically unreachable contacts.*

Telemarketing: *a technique using outbound telephone calls to market products, sales or promotions.*

Text: *an electronic communication transmitted and received by cellular phone.*

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Ticketing System: *a system to record or document interactions with customers. A ticket is created for each caller to include all the information concerning the transaction. The ticket can be created and resolved, or escalated. The same ticket number remains with the same incident to allow for easy access to information for subsequent discussions or actions. Tickets are maintained in a case management or CRM system.*

Toll Free: *when a caller completes a long-distance call without being charged a fee.*

Training delivery: *the method by which training is conducted for contact center agents, or CSRs. For instance, training delivery can be instructor-led classroom training or interactive online training.*

Trunk: *in the case of a call center, a trunk is a single conveyance channel between a caller and the receiver of the call.*

Turnover: *when employees leave the company. The turnover rate is the percentage of employees that leave the company on an annualised basis.*

Up-selling: *in an effort to generate more revenue, CSR will offer more service opportunities or supplementary/complementary products.*

Username: *an alternate identifier used uniquely for a computer system or social networking site.*

Videoconferencing: *telecommunications technologies that provide two-way video and audio communications and allow communication between two or more locations.*

Virtual Call Centre: *enables network and CSR to be in separate locations, but facilitates functioning as if these are all in the same location.*

Workflow Management: *the way in which a task is performed. Tasks are analysed and broken down in an effort to compartmentalise discrete steps and ascertain what the next steps should be.*

Workload: *the combination of time on a call and the work done after a call. It can include the combination of ring time, delay time and conversation time. It may be applied to either CSR requirements or infrastructure planning requirements.*

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