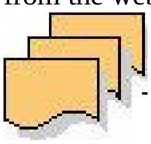
Becoming proactive through personalization

Service Factory

Using business rules and the web technology to deliver service like your best people. Think about what are the customer needs … and how you can provide excellent service

Information may be the lifeblood of today's modern organization - but the right information delivered in a "just in its time" manner often results in a competitive advantage.

Traditional customer requirements	**Proactive - requirements …What can be done to make it excellent… "cloning your best service representative"**
Top menu… lists all the major categories…*each customer now sees the same items* 	Each customer gets a unique top page based on the following: their individual preferences (Their Profile …which they add/change); Things learned about them from their use of the system; and the type of customer they are (contract level, products, business relationship, etc.) *This page can be created as the central professional page for the service technician by allowing the set-up of news feeds relating to service, links to professional organization sites and technical standards. In addition, its possible to have links to other equipment manufacturing sites that they support.*

down load documents from the web site  Secure document transfer & posting (including software) Configuration guides, Field notices, Hot tips, Case studies	• Notify the customer when a document of their interest is put in the download area.
	• Keeping track of who down loads what documents and use it for:
	    • Create Trend information on how customers are using what documents and then use it to better serve the customer
	    • Send notice if training class is to be held that relates to those down load documents
	• Customer can choose to have the newest documents released on their top page

Incident submittal through the web or email  Incident management. Chat, E-Mail, Pager, Service offering	• Send email back to customer with tracking # and hot link allowing them to view status and add additional information to the submitted incident
	• Allow the customer to view status of all their incidents
	• Provide the ability to add business rules around the incidents.
	    • Route incident to different tech. based on customer status / contract level
	    • Mailing based on incident information … up-selling training
	    • Add workflow to route incident based on database.

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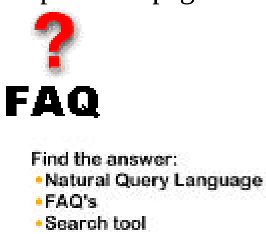
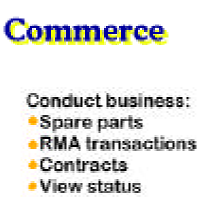
Provide on-line list of customer training courses 	• Based on user profile, notify individuals of courses that they might find interesting or useful. (Based on business rules and profile.) • Provide on-line tutorials, training classes that would allow both self-paced or instructor lead type delivery. This would be done through a third party web product that would integrate with this.
On-line knowledge base … simple static pages 	Provide an easy to use system that allows the people in customer service (not the web master) to easily build knowledge elements and put them on the web. The system can do the following: • Natural query language searches • Can sort FAQ's by products, create categories that are hierarchical • Ranks information by how the customer and service tech use them • Allows for emailing FAQ's to associates • Can rate them for usefulness • Incorporates something like"flyswat.com" to automatically hotlinks to definitions of all technical words that are used in the knowledge base
Request for feedback …simple web form 	System provides multiple requests for customer feedback on usefulness and improvements to serve them. • Simple pop up menu for usefulness through out the web • Questionnaire sent based on customers use and profile requesting feedback • Feedback made public to customers for their information. i.e. results of pop request made after customer adds their input
Commerce is general not available 	Provide the customer the ability to interface with the corporate (enterprise resource planning)ERP system in the following manner: • Submit and get an RMA # and shipping documents. The system will request fault info. and explain why it's important to have. It will try to provide having the knowledge base help prior to giving # • Place orders for spare parts using PO # and credit card. Check status of orders • See contract that they have with company. Be able to place order to upgrade contract or get new one.
Customer contact history file … generally in multiple client- server file NOT INTEGRATED	Integrate history file that customer service tech can add contact information in addition to the incident history file. I.e. customer calls about their interest in being a beta site. Connection to corporate ERP system to create views of the customer that include: **shipment, financial, incidents and contact information**

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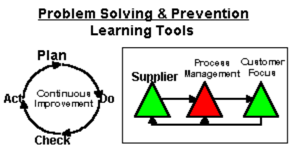
Measurements. reports 	Strong focus on reports based on an integrated delivery using the web as a new channel. The reports will show how people are using the web interface, how the system is helping or not supplying the correct information. Search words that no information can be found lets you know what needs to be added to knowledge base. Reports and measurements based on specific industry standards and quality standards
View of their Contract	Allow the customer and staff to see their original service contract on-line and what other options are available. Can provide special incentives based on type of customer, level of business completed or other data fields for upgrades and extensions.
Functions not found on normal sites.	The ability to collect information when a customer is on the web page can create addition information about their need and how it can make their job easier. Such things as the following could happen: • Based on a customer navigation of the web, interests can be inferred and actions taken by business rules i.e. send training schedule to top page next time customer logs on. • Based on their response to short/long questionnaires, a message is sent to their customer sales person to help them The ability to add business rules and work flow information will allow the customer service business unit person create action that provide services to a customer that your best technician would have recommended if they were dealing with them.
Customer repository	Provide the customer a web location where they can upload documents that would be helpful to the service technician in solving their problems. **i.e. network diagrams, list of contacts, etc.**
Joint service with business partners	Can set-up pages that list business partners and allow transfer to their sites with simple click through. Might sell a product that works with another company's product.
Communities Industry Forum	Enabling "many-to-many" versus just "one-to-one". Providing the equivalent of a "users group experience" within the Web delivery methods. This would be more than just bulletin boards and chat. The User Room would provide a structured environment that gives the secure access customers the ability to do the following: • Publish documents into shared folders on such topics as network implementation improvements, performance optimization, measurement templates, etc. • Have a scheduled forum on various techniques in better using the

	products. Equivalent • Rating of products features • Set of templates that customer community create and share **eshare Expressions** ® is an award-winning, turnkey solution for adding chat, threaded discussion forums and online presentations to websites. It enables organizations to promote community, collaboration and the kind of dynamic interaction that is crucial for brand loyalty. Use it for virtual meetings, live training and conferencing, distance learning, moderated events and social chat.
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Corrective action item list	Provides a space where customers and the owner of the software can keep a list of open action items that relate to their business dealing and ISO corrective action items.
Reports on how well the our client is	Provide the customer reports, that shows how well or not the owner of the system is doing against measurements. Such reports can be as follows: • # of incidents closed by time periods • # of open incidents based on severity, time, etc. This is to provide the service manager information that they can use to show their management how well they are being serviced.