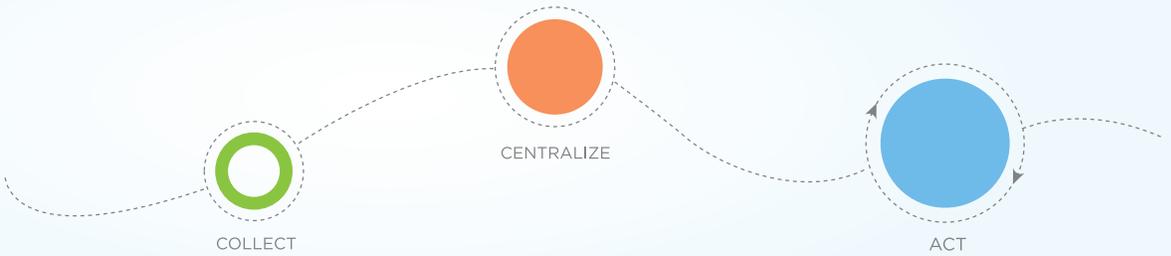# USE CASE

CENTRALIZE

COLLECT

ACT

Call scripting is a highly valuable and immediately rewarding way to use Clicktools. It allows for rapid ROI and can vastly improve user experience in Salesforce™ by saving time and improving data quality.

In this summary document, we'll look at a simple example to illustrate the time-savings possible with call scripting in Clicktools, but keep in mind that you can do more complex variations if you wish. To learn about more sophisticated scripts, please refer to Clicktools Use Case, Call Scripting, Detailed version (PDF).

SALES

Sales Call

Event Registration

Call customer for further information and qualification

Sales rep invites customer to upcoming event

The basic activity flow goes like this:

- A customer calls in or an agent calls out.
- The script changes based on the conversation or experience of the agent.
- Clicktools updates the relevant information.
- The agent moves on to the next (*inbound or outbound*) call.

A simple inbound script

Let's look at an example based on an inbound call. The script may be delivered by clicking on a custom link against the contact or in larger organizations, could be popped by your CATI system. See an example script here.

In this example, we're collecting fairly standard information contained in an Opportunity, but obviously, in your implementation, you would create questions to support your particular sales process and product(s).

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Scripts
New case

Shortcut
⚠ Unresolved items

Recent items
- Daisy Alice
- The Event: Gala dinner
- The Event
- TeleSales - followup A
- TeleSales - followup B
- TeleSales

🗑 Recycle Bin

📖 Call script

Hello Daisy, thank you for calling BigCorp. To start, I need to confirm your details...

May I confirm your work email address
`clicktoolsefm@gmail.com`

and best phone number to contact you on
`0800 0432587`

That's all I needed, thank you. How may I help you?
`I need a new WidgitBuster product`

And when do you need this by?[mm-dd-yyyy]
`1` `13` `2013`

Daisy what role do you play in the purchase process?
`Economic Buyer`

What do you need us to do next?
`Send the order form direct to Daisy at the above email address`

Your comments
Estimated value
`900` $USD

What stage is the work?
`Proposal/Price Quote`

Comments - provide as much information as you can (goes in to Opportunity Description).
`Ready to buy now.`

Submit

POWERED BY
clicktools

The completed example in-bound call script with updated email and phone plus opportunity details.

When the information is collected on the call and the Submit button is pressed Clicktools automatically:

- **Creates the Opportunity**
- **Records the completed call and relates it to the Opportunity and Contact**
- **Adds the Contact as the Decision Maker to the Opportunity**
- **Updates the Contact record**

We have created two objects (the Opportunity and Activity) and linked them to the Account and Contact. How long would this take manually? Five minutes, maybe 10 minutes?

Using Clicktools for simple call scripting, processing 10 orders a day (at 6 minutes each) saves 366 hours a year – that's around a month and a half's work a year!

1 PERSON COMPLETING 10 SCRIPTS A DAY TAKING 6 MINUTES TO UPDATE INFORMATION IN CRM SAVES:

1 HOUR A DAY   **5 HOURS A WEEK**   **3 DAYS A MONTH**   **> 1 MONTH A YEAR**

We have considered a simple sales-based call script, but there are many other examples where the concept of scripting can pay dividends. Why don't you try one today?

Some examples include:

- Traditional phone-based Market Research *(internal and external)*
- Sales qualification calls
- Sales follow-up calls
- Inbound Support calls
- Outbound Support calls
- Customer onboarding set-up calls

NOTE: You don't have to initiate the script from within your CRM. If you use outside agencies or call centers to make sales or marketing calls you can give them the script directly – they can go through the scripts and the information will be added immediately to CRM. Hurrah! No more spreadsheet manipulation and waiting on telesales results.

Now, It's Your Turn.

We hope this information gives you good insight into how you'd benefit from implementing a call scripting process using Clicktools and CRM. We hope you get started as soon as possible. When in doubt, remember this core principle; when you strategically collect, centralize, and act on customer interactions, you will dramatically improve customer relationships. It's just a matter of integrating Clicktools with your existing CRM solution, which once you get a hang of it, is one of the most powerful ways to positively affect your business. And the best part – we are here to help every step of the way!

ABOUT CLICKTOOLS LTD.

Clicktools provides SaaS solutions that leverage CRM to collect, centralize, and act on customer interactions. Since 2001, Clicktools has helped organizations of all sizes and across industries improve customer experience. Thousands of marketing, sales, and support professionals worldwide use Clicktools to collect information through surveys, scripts, and forms; centralize the data in CRM; and act on insights to deepen customer relationships. Notably, Clicktools was the first survey provider to integrate with Salesforce® and was an original member of the AppExchange®. The company is privately held with headquarters on the South Coast of England and a US-based office in Phoenix, Arizona.

Contact Us Today For a FREE Demo

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