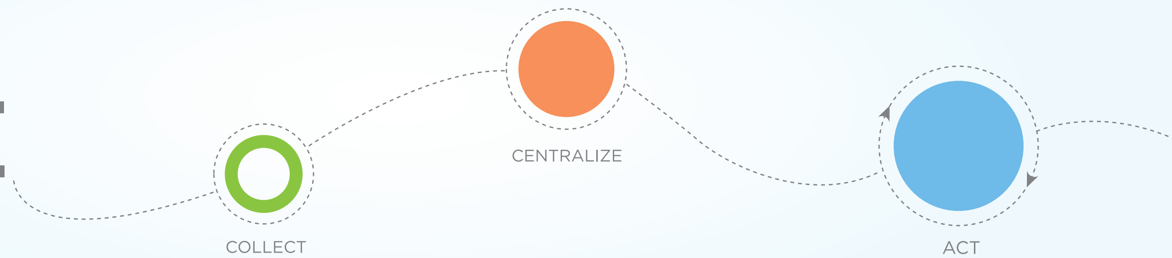
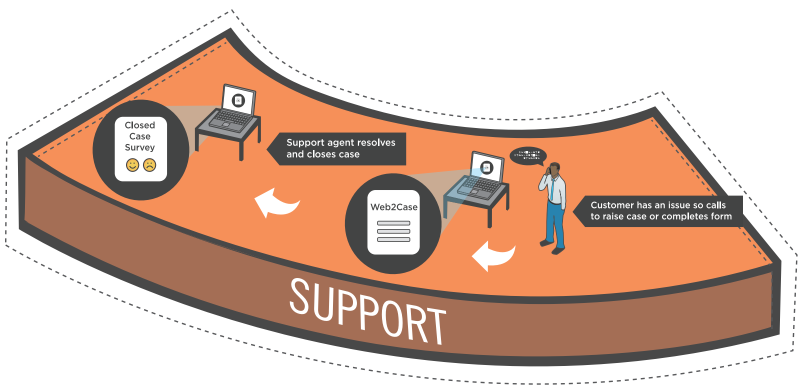
clicktools

CLOSED CASE FEEDBACK

USE CASE



Support clearly has a major impact on customer experience, which is why it's a starting point for many Clicktools implementations. This document gives a quick, high-level overview of how to set up a closed case/ticket survey. If you want more detailed instructions, including screen shots and step-by-step guidance, please refer to our complete Closed Case Feedback PDF.



The basic activity flow goes like this:

- A case is closed in your CRM system.
- An automatic email goes out asking for feedback in a survey.
- The recipient completes the survey.
- Survey results are passed directly back into CRM.
- Support and Account Managers are alerted to any low scores to quickly recover from service failures.
- Overall results and KPIs are used to drive ongoing improvements to the entire support process.

As with all Clicktools to CRM processes, we want to think in terms of "collect, centralize, and act." Collect information through surveys, scripts, and forms; centralize the data in CRM; and act on insights to deepen customer relationships. Let's look at that formula, specifically for a Closed Case Survey.

Collect

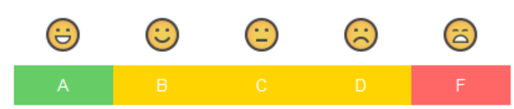
Once a case has been closed, the next step is to ask for feedback on the quality of service. Best practice, research, and common sense dictate that we should do this as soon as possible after the event. The clearest, most meaningful input will come when an interaction is fresh in your customer's mind. Also, you may want to apply some simple rules to throttle when surveys are sent (e.g. send a survey once every X cases or if you only want specific feedback, for example, on certain products or regions).

You can automate this process using workflows in your CRM system. Or, if you cannot access the information you need using workflow, then Clicktools Deploy capability will be ideal.

Once your deployment is setup, you will need to create the email you send to the person who raised the case. An example is shown below:

Dear Daisy,

With reference to your recent Case (00001604, Can't install program) we would appreciate your feedback on our service to you. Please begin by rating the quality of our on-line help by clicking on the most suitable smiley:



By clicking the smiley you will be taken to a ReportCard that enables you to grade our efforts across the business. This is part of a process we undertake to improve our Customer Experience and the grades and comments you give us, good or bad, will help us improve our service to you in the future.

Thank you
Chief Customer Officer

We ask for feedback on a range of topics using ReportCards. If you do not want to be asked to complete any more ReportCards please feel free to opt-out.

We are happy to guide you in all areas of building your survey – from content to deployment. Please reach out to your Customer Success Manager for additional information.

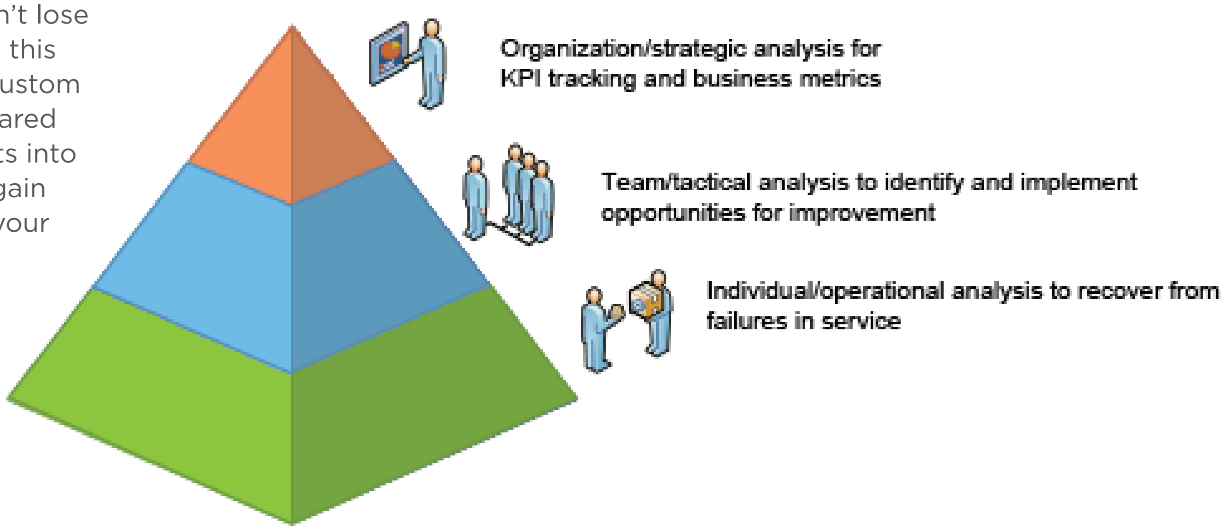
Centralize

Once surveys are completed, the next step is to get the information into CRM. The most common question we are asked is: "where should we put it?"

We recommend that you build a custom object to capture data from all survey responses, rather than mapping data directly to the contact, account, or case. While you may begin with closed case surveys, you may well find that you grow the program to collect other types of feedback (e.g. general customer sat, win/loss, event, etc.). You don't lose anything by putting this information into a custom object (when compared to putting the results into the Case), but you gain the ability to grow your survey program without a huge overhead and to maximize the visibility of feedback within your organization.

Act

Everything written in this document – from asking for feedback as quickly as possible through to your storage approach – is geared to this end point. It's critical to act strategically, quickly, and appropriately on the information, once you have it. The only reason to ask customers for feedback is so that you can improve as an organization. The responses should be available in CRM and used at all levels of the organization.



Now, It's Your Turn.

This should give you basic insight into how you'd benefit from implementing a closed case 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 the 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!