
Professional Services Overview- ROI CustomResponse™
ROI Direct.com
Last Update 3/13/00

Our goal at the Professional Services division of ROI Direct.com is to help you successfully implement and use our applications, achieve the greatest potential for your Internet strategy, and maximize the return on your Internet investment.

In addition to enabling you to sell products and services over the Internet, allowing you to target your customers using e-mail marketing, and enhancing your customer relationship through online customer care, our expert consultants will give you invaluable knowledge, experience, and direction in conducting business online.

CustomResponse® Professional Services

ROI Direct.com's eCustomerCare solution, ROI CustomResponse™, supports your customer service objectives by enabling you to efficiently and effectively manage inbound customer e-mail while removing the complexity, personnel resources, and financial implications of traditional customer service requirements. With CustomResponse, your customers' inquiries and concerns are addressed quickly and professionally, increasing their satisfaction and reinforcing your value to them.

This document focuses on two levels of Professional Services for the CustomResponse application. Level 1 includes an assessment of your current customer care process, a detailed analysis of your inbound messaging needs, and an extensive report outlining our eCustomerCare recommendations and the appropriate CustomResponse configuration that meets your eCustomerCare objectives. Level 2 is the implementation of our recommendations through the configuration of the CustomResponse system, including the creation of appropriate auto acknowledgements, auto responses, response suggestions, queues, and routing rules. After Level 2 is complete, you will be equipped with a powerful application that will allow you to successfully execute an Internet customer service strategy.

Level 1 - Strategic Assessment and Recommendations

All of ROI Direct.com's consultants are eCustomerCare experts and will work with you to determine and meet your online customer service objectives. The first level of implementation requires a detailed assessment of your current situation and clear understanding of your future goals. Often, a site visit is required to complete these initial steps. A personal interview and assessment process proves more effective than a phone interview, and the consultant uses these face-to-face interactions to accurately understand your company's needs and make appropriate recommendations. During this time, the consultant will also inform you of the best practices of eCustomerCare and how you can enjoy similar, successful results through your CustomResponse configuration. Upon completion of the Level 1 assessment, our eCustomerCare consultants will deliver a personalized report that presents their findings, outlines strategic recommendations, and details the appropriate CustomResponse configuration and deployment timeline.

Level 1

Level 1 includes a detailed assessment of the following:

- **Basic Metrics**

Before we get started on eCustomerCare specifics, we will review your inbound e-mail volume, your current e-mail management system, and short- and long-term demand forecasts. By understanding these metrics, we will be able to configure the CustomResponse application around your current situation and future needs.

- **Web-forms**

One of the first steps in developing your online customer service presence is to create an interface between you and the customer. The Web-form will serve as this interface and will be the means by which your customers submit inquiries to CustomResponse. This Web-form is typically accessed through a 'Contact Us' link or button from within your web-site.

We will work with you to develop a Web-form that supports your company's identity and matches your site's look and feel. In addition to including general information and inquiry fields, we will customize the form to include special fields or pull-down menus that list inquiry topics specific and common to your business (for example, shipping, custom orders, payment policy, etc.).

- **Frequently Asked Questions**

We will work with you to determine a list of commonly asked questions and the appropriate answers to those questions. We will use these FAQs to develop a knowledge repository of standard template responses.

- **Template Responses**

By using pre-written response templates, you can reduce your per-message response costs by up to 80 percent. We will create these templates around your FAQs and will also consult you on the appropriate wording and usage so that your customers will be satisfied with the information and service they receive.

- **Automatic Acknowledgments**

Using CustomResponse, all e-mail inquiries will be responded to immediately and automatically. We will work with you to determine the elements of this automatic acknowledgment message.

- **Automatic Responses**

Using CustomResponse, you have the option to deliver automatic responses to specific inquiry topics (for example, shipping). We will help you determine if this is an appropriate strategy for your company. If automatic responses are to be employed, we will generate a list of key topics and their respective responses, ensuring accuracy, consistency, and successful customer communication while reducing customer service representative (CSR) response times by 50% or more.

- **Routing and Queues**

Routing plays a key part in successful eCustomerCare by sending inbound customer e-mail to the appropriate queue based on keyword, topic, CSR, department, or any other variable. We will work with you to determine the appropriate routing strategy, filters, rules, and the most logical number of queues to implement.

- **Management Reports**

Management reports will be instrumental in your understanding of customer needs and how you can better manage customer interaction using the e-mail channel. We will show you how to access real-time performance, productivity, and usage reports and perform analyses on multiple variables. Using CustomResponse's robust reports, you will be able to verify your results and validate your Internet investment.

- **System Management and Administration**

We will show you how to optimize the system's performance and improve customer service through administering and editing response templates, routing rules, queues, CSR assignments, and system functionality – all through a Web-based interface.

Level 2

During Level 2, we will configure and implement the CustomResponse application around your system expectations and eCustomerCare requirements. This implementation includes the implementation of all content and system users and the creation of:

- template response content (auto acknowledgements, auto responses, response suggestions)
- template response rules
- queues
- routing rules

Deployment can be completed in as little as five days, depending on the scope of work. After Level 2 is completed, you will be equipped to provide superior online customer care. The result? Increased customer satisfaction, improved browse-to-buy ratios, higher customer retention, increased customer loyalty and profitability, greater online revenues, reduced service costs, and a stronger competitive advantage.