



Call Centre Management

Linking call centre operations, web ordering, customer relationship management and enterprise resource planning processes together

Solution Overview

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CALL CENTRE MANAGEMENT IN MICROSOFT DYNAMICS AX

Businesses acknowledge the strategic impact of service on both customer loyalty and the bottom line. The service aspect of the business is increasingly under pressure to decrease operational costs, improve service delivery quality, drive service revenues, and increase customer satisfaction – the demand for these improvements has never been greater. To take a phrase from the Lean Thinkers “Do more with less” is the common operating plan for service businesses regardless of industry.

Today’s customers expect to do business anytime and across multiple channels of communication, languages, and currencies with a significant shift towards the world wide web. They expect to speak to someone with the right skills who has all the information at hand to meet their particular needs. In addition, they want increasingly higher levels of service at a lower price with increasingly complex price/discount negotiations.

eBECS have produced the web enabled Call Centre Management in Microsoft Dynamics AX. This addresses the fundamental problem faced by all enterprise level sales operations; how to integrate CRM, Telesales and their ERP operation into a single seamless operation.

“Within six months, the combination of the new solution and effective promotions has increased orders by 50% to 2,200 a day, without increasing staff. Our average truck takes out £3,000 worth of goods, thus making our distribution centre capable of handling an extra £31 million worth of business a year using the same resources.”

Mustaque Ahmed, Head of Operations at JJ Food Service Ltd.

ORDER MANAGEMENT (TELESALES)

- **Intelligent and Agile Order Entry:** Using the Order-Pad, which provides a complete customer order view, telesales agents are able to create customer orders with minimal effort by accessing order trends and history in a simple format allowing the agent to quickly enter the customer order and deal with any price & delivery queries very quickly. Importantly the solution efficiently provides for every opportunity for the agent to up-sell and cross sell.
- **Quotations:** Agents can issue a quotation to a customer or prospect. When to a prospect and it is accepted, the prospect can be converted to a customer and the quotation to an order with a one-button operation.
- **Order Duplication Prevention:** Avoids the problem of a customer calling and also faxing and/or entering the order on-line.
- **Advanced Customer Search:** The Order-Pad allows the agent to quickly search for customers based on key data such as telephone number, name, and address.
- **Advanced Item Search:** During order entry the agent can search for items in the Order- Pad using free form parameters in similar format to the customer search.
- **Returns Management:** A Telesales agent can quickly and efficiently arrange for returns to be scheduled whilst taking an order for the customer.
- **Backorder Handling:** Customer backorders are readily visible from the Order-Pad allowing the agent to quickly advise customers of delivery dates and quantities.
- **Carriage Charges:** Two levels are provided:
 - Automatic, based on order value: i.e. if the order value is below a user defined threshold for the customer a user defined charge will be applied, but if the order value is above the threshold no charge will be applied.
 - Manual: user definable. E.g. a surcharge for guaranteed next day delivery.
- **Customer Order History:** A Telesales agent can quickly view customer's order history. This allows the tracing of their previous orders and identification of who has dealt with that customer, as well as any complaints / issues the customer has had.
- **Allowed / Denied Lists:** Customers can be restricted from buying certain goods, or alternatively can be setup to only be authorised to buy certain goods
- **Advanced ATP:** The **Available to Promise** function gives a snapshot of the actual available stock at the point of order entry.
 - ATP takes into account the purchase delivery date to check if the timeframe is short enough to get stock in.
 - ATP suggests alternative products / dates and advises the Telesales Agent of the actual quantity available. The customer can also get a reminder for the item the next time they are placing an order.

- Where there is insufficient inventory for immediate delivery, the agent has the option of delivering only what is available and cancelling the balance, or delivering what is available and placing the balance on backorder.
- ATP is designed with speed and performance in mind. Whilst it is designed to provide real time stock availability, it does not affect the overall performance of the order pad whilst maintaining 100% accuracy.
- **Agent Last 10:** Each Telesales Agent can see the last 10 customers they have taken orders for and access these orders quickly.
- **Open / Confirmed / On Hold:** Telesales Agents can see all of their open, confirmed, and on hold orders in an instant.
- **On Hold Management:** eDCCM allows the setting up of specific rules that can be switched on or off depending on preferences.

TASK MANAGEMENT

- **Automated Call Sheet Generation:** This is an automated (can be set-up manually) customer call sheet, which is then allocated to agents via the Order-Pad according to skills and availability.
- **Customer contact tasks** - when the customer inter-action is taking place critical tasks required to either maintain the customer relationship or gather new opportunities are captured and allocated e.g. new brochure requests etc..
- **Drag and Drop Task Allocation:** Tasks can be allocated simply by dragging to an agent. This overrides the skills rules.
- **Skill Based Allocation:** Tasks are allocated based on the tasks primary and secondary skills.
 - **For Primary skills,** both the agent and the customer must have these skills E.g. if the customer only speaks Spanish then the agent must have Spanish speaking skills.
 - The agent and customer's secondary skills are also checked to enable a better match.
 - Finally the agent is allocated a task, preferably for a customer they have dealt with before.
- **Task History:** Each action on a task is traced, and history is either automatically added, or the agent is prompted to add.

- **Task Forwarding.** Return to Queue: Tasks can be forwarded from agent to agent, and can also be returned to the queue for automatic reallocation to another matching agent.

ADVANCED CUSTOMER MANAGEMENT

- **Customer Wizard:** All customer data is setup via the customer wizard function which is designed to ensure that all necessary data is setup correctly and consistently. Additionally, using the wizard it is possible to set up Prospects – i.e. possible future customers – so that just quotations can be sent.
- **Customers Awaiting Creation:** Once the wizard completes, data is initially populated into a holding table. Only users with the correct rights can approve this data to create the live customer.
- **Customer Timings:** Customers can have delivery, opening, and calling times setup against them by site
- **Customer Hierarchy:** Customer hierarchy can be established to defined the structure of the customer and where pricing, and more importantly payment, takes place - e.g.
 - Head office,
 - Customer area,
 - Shop/outlet

TARGET LIST / UP SELL / CROSS SELL

- **Target List Generation:** Produces a list of items the agents should Upsell/Cross Sell to the customer during the order entry process. The items added to the list are selected based on the type of customer, and the product segments they usually buy. In addition the Target List rules can be applied.
- **Target List Tagging:** If a customer buys an item from the target list, the agent will get a tag added to show they have sold from the target list.

ADVANCED DELIVERY ORDER ROUTING

- **Automated Order Document Generation:** Automatic generation of orders that are ready for routing
- **Automated Route Creation;**
 - The Automated Routing process is based on an interface between eDCCM and truck routing packages that will provide the optimum routes for any given truck.
 - Auto-routing provides warehouse management teams with the customer order drop sequence and how a truck should be optimally loaded.
 - The loading and order drop sequence can be overridden by warehouse and transportation management staff.
- **Automatic allocation of returns:** Returns are automatically allocated into the routes

ADVANCED PRICING STRUCTURE

- **Pricing By Sales Channel** (e.g. Telesales / Counter Sales / All)
- **Pricing By Sales Region** (Hierarchical Search)
- **Pricing by Customer** (Hierarchical Search)
- **Pricing by Customer Group:** Where relevant, customers can be grouped and pricing specified separately for that group
- **Multi-Buys:** There are several different types available:
 - including EQV pricing and
 - buy X get Y free (BOGOF)
- **Discount & Discount Catalogues:** This provides catalogue functionality for discounts.
- **Discount Bands:** Allows setting of prices for multiple items based on their allocated band.
- **Fixed Price/ Fixed Discount:** Standard discounting across multiple items
- **Price Item Approval:** Once a price item has been approved will it become active.

CTI

Depending on the phone system in place the solution can automatically identify the caller and :-

- **Automated call Routing,** When the agent has an incoming call a form will automatically popup. If the phone number is stored, the system will identify the customer.
- **Automated Display of Customer information.** When the Telesales Agent takes the call the order pad displays the customer search screen and displays the account tree for that specific customer.

WEB ORDERING / ENABLEMENT

- **AJAX-Enabled, Cross-Browser application**, runs on all major web browsers (Explorer, Netscape, Firefox), providing an interactive and a user friendly interface.
- **Easy Tab display**, to navigate between item search, order history, promotions, and catalogue browsing.
- **3-Level category structure**, displayed on a dedicated tab, and also easily accessible from an always available tree view to the left of the web browser page.
- **Simple and Advanced Item search**, ability to search on all items in the catalogue based on item name, number, or category.
- **Order from history**, a parameter controlled list of history items is easily accessible to allow customers ordering from their order history.
- **Promotions and special offers**, items with special offers –can- be listed separately to allow for easy browsing, this is mirroring eDCCM Advanced Pricing Structure for Fixed Discounts, Quantity Discounts, Multi-buys, and band discounts.
- **Order Summary**, displayed in a compact, always available mode to the user, listing any promotions or offers applicable, with ability to add/update/remove items.
- **Real time ATP (Available to Promise) checks**. When the customer requests an item on the web, quantities and earliest delivery dates/times are calculated in real time against available stock, also taking into account any open web orders in progress.
- **Weighted Item sorting**, all item lists can be sorted according to their sales volume in a predefined time period, to allow for listing of most sold items on top of the lists.

ABOUT eBECS

eBECS is a specialist in the design and delivery of solutions for **manufacturing, distribution** and the extended **supply chain**.

eBECS delivers world class Lean and agile business solutions using Microsoft Dynamics AX and Dynamics CRM. Its solutions streamline and integrate processes, minimise waste, optimise the supply chain and manage demand-driven operations.

eBECS is a global company with a personal touch and takes enormous pride in its ability to reference a large client base. eBECS has also joined forces with Microsoft to establish the 'Lean Centre of Excellence', which serves as a collaborative facility for organisations looking to utilise the Lean capabilities within Microsoft Dynamics.

For more information about Call Centre Management in Microsoft Dynamics AX, please email customer@ebecs.com visit www.ebecs.com call UK and Worldwide + 44 (0) 1246 888 555 call U.S. and Canada (1) 678 318 3529.

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