

Major Telecom Company

Custom Business Services

Lesson 5: Compatriot System Postsales Service Plan Tool

(For Service Managers)

November, 1999

Leader's Guide

Note: The Compatriot login for training is "look1234"

Note: Project Managers use the Compatriot Training SALES database, not the Engineer database.

Estimated time: 1 hour

Post Sales Service Plan

 (Slide File = Eng5.ppt)

Lesson Introduction

- In this lesson you'll take a look at the Service Plan tool
- It documents customer satisfaction meetings
 - And the actions that result from them



Motivation

- ASK: What are some of the problems you have dealing with customer satisfaction meetings?

*(Write responses on flip chart; do not criticize.)
(When done, post flip charts on wall.)*

- Some of these problems will go away when you use the Service Plan tool.

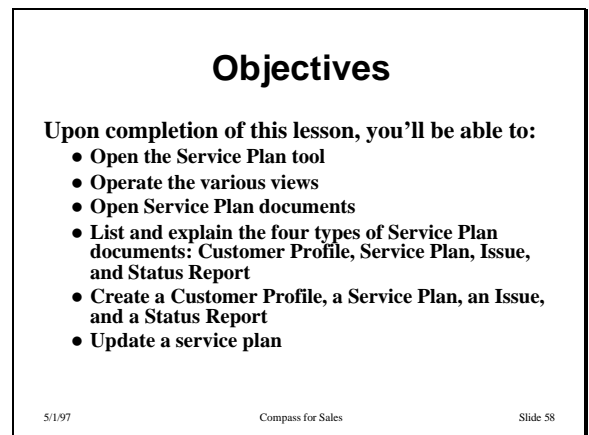
(On the flip chart pages, checkmark (✓) the problems that are covered by this tool and course.)

Objectives

(Read from slide)

Activities

- You will take a look at each document
- And learn to create and update them



Overview

(Read from slide)

Benefits

(Read from slide)

Overview

- **What is the Service Plan Tool?**
 - Lotus Notes application
 - Documents post-sale customer satisfaction, issues, and corrective actions
- **Who uses the Service Plan Tool?**
 - Service managers of all types
- **When is the Service Plan Tool used?**
 - After a customer meeting

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Service Plan Tool Benefits

- **Secure documentation of customer satisfaction and corrective actions**
- **Issues and corrective actions don't get lost or forgotten**
- **Upper management can inspect the situation without taking up service manager's time**
- **Facilitates keeping service team up to date**
 - Even for those who can't be at the meeting
- **Facilitates handing off customer to new service manager**

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Service Plan Documents

Customer Profile Document

- Serves as a container for a service manager's documents for a given company
- Make a new one when service manager changes
- Also lists the boss' name and the relevant General Sales Manager



Service Plan Document

- Documents a single meeting with the customer about service satisfaction and issues
- Gives an overall rating
- Lists who attended
- Lists issues, actions plans, and resolution
- Contains remaining documents as sub-documents

Issue Document

- Documents a single issue from a meeting
 - Is subordinate to the meeting's Service Plan document
- States who is responsible
- States the status of the issue resolution
- Documents the action plan for corrective action

Status Report

- Used when an action plan is large enough to be a project

Service Plan Documents

- **Customer Profile**
 - Serves as container for one customer's documents and documents service team members
- **Service Plan**
 - Documents a single customer meeting held to discuss service satisfaction
- **Issue**
 - Documents a single service issue or problem, the intended corrective action, and the correction results
- **Status Report**
 - Reports on progress for corrective actions that are large enough to constitute a "project"

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- Is subordinate to the meeting's Service Plan document
- Documents the:
 - Due date
 - Project description
 - Status of the project

Online Demo - Opening Service Plan

(Encourage participants to follow along on their computers. Go slowly enough and be obvious in what you are doing.)

(From the Compatriot main menu)

1. Open Post Sales.
 2. Run Service Plan.
 3. Explain views:
 - Customer
 - Service Rating
 - SCM/ASA.
 4. Point out reports views
(Just show them where they are. Expand group but do not select any.)
 - These will be explained later.
 5. Return to the Customer view.
- ASK: How can you use this document and these fields in your job?

(Write responses on flip chart; treat all responses with respect. Post flip chart on wall.)

Online Demo - Customer Profile Document

1. Expand ABN/AMRO totally.
2. Open the Customer Profile.
3. Point out:

- Company name
 - SDM/ASA name
 - Manager name
 - Sales manager name.
4. Close the Customer Profile.
- ASK: How can you use this document and these fields in your job?
- (Write responses on flip chart; treat all responses with respect. Post flip chart on wall.)*

Online Demo - Service Plan Document

1. Open Service Plan 1/11/99.
2. Point out fields from top to Ameritech Representatives.
3. Point out:
 - Issues
 - Action Plans
 - Other items.
 - Project attachments area.
4. Explain *Update Issues and Action Plans* button.
5. Demonstrate *Update Issues and Action Plans* button.
6. Point out buttons:
 - New Issue
 - New Status Report
7. Close Service Plan.
 - ASK: How can you use this document and these fields in your job?

(Write responses on flip chart; treat all responses with respect. Post flip chart on wall.)

Online Demo - Issue Document

1. Open first Issue 1/11/99.
2. Point out fields in top section.
3. Point out issue, action plan, and resolution fields.
4. Point out that the contents match what was just added to the Service Plan document by pressing the *Update Issues and Action Plans* button.
5. Close the Issue.

- ASK: How can you use this document and these fields in your job?

(Write responses on flip chart; treat all responses with respect. Post flip chart on wall.)

Online Demo - Status Report Document

1. Open *third* Status Report for 12/14/98 (LMHC Des Plaines).
2. Point out fields and contents.
3. Close the Status Report.

- ASK: How can you use this document and these fields in your job?

(Write responses on flip chart; treat all responses with respect. Post flip chart on wall.)

Online Demo - Reports Views

1. Expand the Reports views
2. Demonstrate the Service Plan Report view
 - Shows the Issues and ratings by customer
3. Demonstrate the SDM/ASA Schedule view
 - Shows the meeting dates and ratings by SDM/ASA

by customer

4. Demonstrate the Issue Breakdown view
 - Shows the Issues documents by status and type
5. Demonstrate the Monthly Summary view
 - Shows the monthly summaries for a certain month (selected when you open this view) by year by customer

● **ASK:** How can you use these reports in your job?

(Write responses on flip chart; treat all responses with respect. Post flip chart on wall.)

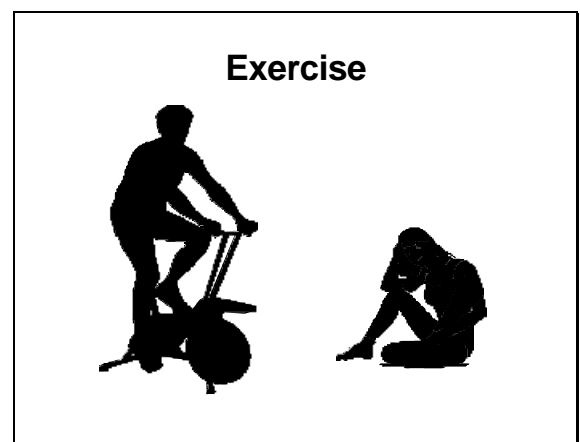
Online Demo - Create New Document

1. Click on the Create New Document Button.
2. Double-click the type of document.
3. Double-click the customer name.
4. Double-click the meeting date. A blank document opens.
5. Fill in the fields.
6. Save the document.
7. Close the document.



Practice Activity 1: Creating Service Plan Documents

(Hand out exercise. Allow 30 minutes. Assist student who are having real trouble, but do not do the work for them. Most important: do not touch their keyboards or use their mice.)





Review

(Have different participants tell what was learned for each of the objectives. Add to, comment, or correct as necessary.)

Service Plan Review

In this lesson, you learned to:

- Open the Service Plan tool
- Operate the various views
- Open Service Plan documents
- List and explain the four types of Service Plan documents: Customer Profile, Service Plan, Issue, and Status Report
- Create a Customer Profile, a Service Plan, an Issue, and a Status Report
- Update a service plan

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