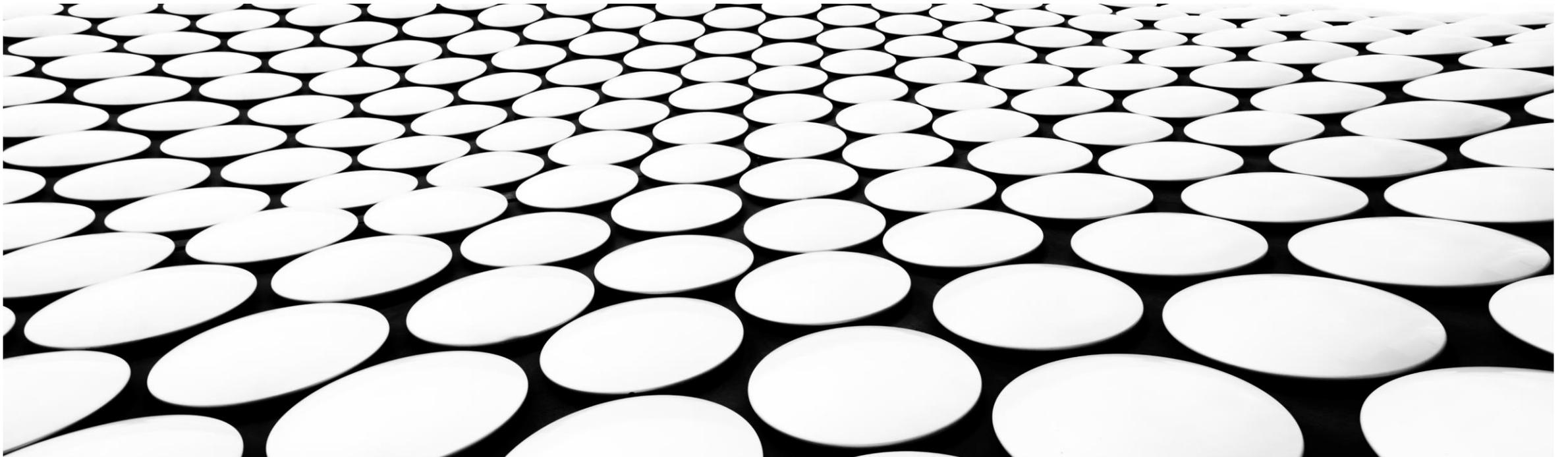


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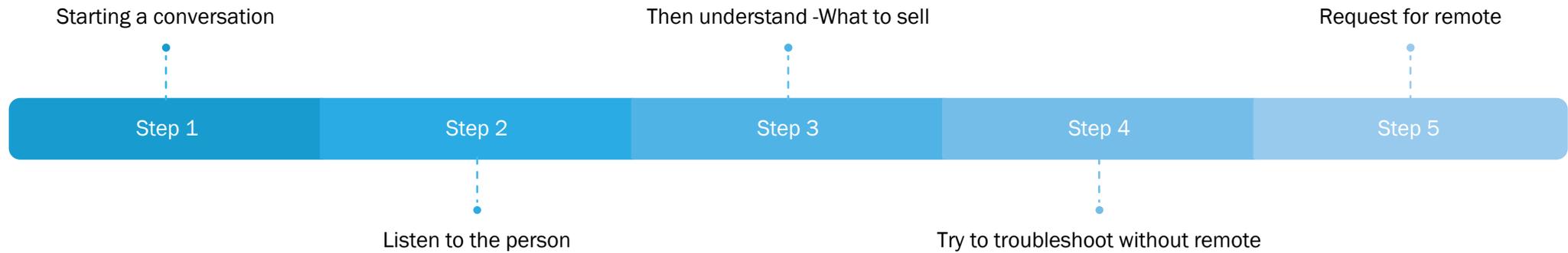
# CRM TRAINING

DATE: 8 APRIL 2024



# STAGES OF A SALE CALL

## FRESH SALES



# HOW TO USE THE CRM – FRESH SALES (1)

Dashboard

Leads

- Fresh Leads
- Call Backs
- Post Dated Leads

Chat (Link)

Logout

## Fresh Leads

### Fresh Lead List

3 Add New Records

Show 10 entries

Search:

| # | DATE        | LEAD ID | HOUR     | COUNTRY | CX DETAILS  | FORM TYPE           | BRAND   | ISSUE                   | RESPONSE | ACTION |
|---|-------------|---------|----------|---------|---|---------------------|---------|-------------------------|----------|--------|
| 1 | 03-Jun-2024 | 1000635 | 06-07 PM | USA     | Name: Deller<br>Email: deller47e@aol.com                  | Printer Support USA | Hp      | Printer Offline         |          | 2      |
| 2 | 03-Jun-2024 | 1000634 | 06-07 PM | USA     | Name: Vincent Saulino<br>Email: vsaulino@posillicoinc.com | Printer             | Brother | NA                      |          |        |
| 3 | 03-Jun-2024 | 1000633 | 05-06 PM | USA     | Name: Aldoandriott<br>Email: aldoandriotti@gmail.com      | Printer Support USA | Epson   | Connect Printer to Wifi |          |        |
| 4 | 03-Jun-2024 | 1000632 | 06-07 PM | USA     | Name: Oldmanray<br>Email: oldmanray22@outlook.com         | Printer Support USA | Hp      | Setting Up New Printer  |          |        |

**Fresh leads view** - all new leads will be visible here

1- This a fresh sales view- latest forms will be visible on the top

2- Click on action button to cater to the lead

3- To add new leads (inbound calls –without a form – you can add a lead by clicking on “Add new records”

# HOW TO USE THE CRM – FRESH SALES (2.1)

Tjmooremd@yahoo.com Details View Records

### Tjmooremd@yahoo.com Details

|             |                     |              |                           |
|-------------|---------------------|--------------|---------------------------|
| Date :      | 03-Jun-2024         | Lead ID :    | 1000621                   |
| Hour :      | 05-06 PM            | Cx Name :    | Tjmooremd@yahoo.com 1     |
| Country :   | USA 5               | Cx Email :   | tjmooremd@yahoo.com       |
| Form Type : | Printer Support USA | Cx Mobile :  | 7752508060 2              |
| Brand :     | Hp 4                | IP Address : | 174.100.228.46            |
| Model :     | NA                  | Issue :      | Connect Printer To Wifi 3 |

### Form Response

Call Status \*  6

Did the cx tell you his name?  7

Did the cx tell you his printer model name?  8

Does cx have internet connectivity?  9

does cx have the computer?  10

Remote Status \*   11

Comment \*  12

Sale Status \*

## Fresh case view

Points 1-5 case details will be visible on top

6- Chat status is to be marked ( Connected, vm, dvm, wrong number,number not in service )

Points 7-10 are to be confirmed from the cx( customer) to ensure that we can help the user better

11 If the user agrees to share the remote connection – Mark as Yes

12 – add comment here about the conversation

If cx agrees for the service – Mark sale status as “Yes”

Else are options to select “ No” or mark a call back - arranged enter time in IST

# FRESH SALES (2.1- IF STATUS IS VM/ NUMBER NOT IN SERVICE)

## Leads

Tjmooremd@yahoo.com Details

[View Records](#)

### Tjmooremd@yahoo.com Details

|             |                     |              |                         |
|-------------|---------------------|--------------|-------------------------|
| Date :      | 03-Jun-2024         | Lead ID :    | 1000621                 |
| Hour :      | 05-06 PM            | Cx Name :    | Tjmooremd@yahoo.com     |
| Country :   | USA                 | Cx Email :   | tjmooremd@yahoo.com     |
| Form Type : | Printer Support USA | Cx Mobile :  | 7752508060              |
| Brand :     | Hp                  | IP Address : | 174.100.228.46          |
| Model :     | NA                  | Issue :      | Connect Printer To Wifi |

### Form Response

Call Status \*

DVM (VM not left) ✓

[Submit](#)

### Fresh case view – DvM/VM

If the lead goes directly to voice mail or number not in service kindly select the appropriate reason and press submit button

# SALES PITCH

## EXAMPLE 1

Hello My name is Xyz this call is Regarding your (Printer model name) Hp printer , i'm the assigned Technician will be assisting you further.

- You raised a service request, that you need some help with your Printer (Printer issue) which is print is offline.

### Disclaimer :

We would like to inform you that if the call gets disconnected, we will call you back and assist you until your issue is resolved at your end.

- Lets start with you helping me with your printer model
- Please help us with your Printer model (Pause)
- q1: Do you recall making any kind of changes with your Computer or printer ? (Pause)
- q2: Which operating system are you using right now? (Pause)
- q3: Have you tried any step to troubleshoot the problem ? (Pause)
- q4: Please check it once if there is any light flashing on your printer ? (Pause)

# SALES PITCH

## EXAMPLE 1 (CONTINUED)

Meanwhile we are checking for a few resolutions for you  
Would you mind me asking a questions ( REPO Building

- How is your day going so far (Pause) – allow the person to respond
  - If the person says “it was good until this printer stopped working and now I am stuck”  
Respond by saying “ you don’t have to worry about it now, we are here to help and assist you until your issue is resolved
  - If the person says “ Well, I am doing well and it’s a pleasant day for me”  
Respond by saying “ I am glad to hear this and would like to inform you that you would require your help to resolve the issue”
  - If the person says “its good”  
respond by saying “ We will ensure that your day becomes better after using our service here”

---

# SALES PITCH

## EXAMPLE 1 (CONTINUED)

### Trouble shooting

- Would you please try to make a xerox copy from your Printer it self (if printer issue)
- Can you please put a document on flat bad and try to make a copy of that .
- As you are able to make a print , that means there is no problem with the printer itself .
- To resolve this situation , you need to install the drivers again in your Computer .
- In order to assist you with the installation process and make it convenient for both of us , we will initiate Remote Support .

# HOW TO HELP THE USER SEARCH THE BROWSER ICON

- Kindly look for a icon through which you open a browser (if user do not know about browser)
- Do you know what is a browser ?  
let me help you understand what is a browser) it is an icon on your desktop

## **For windows**

Internet icons ( a edge icon, google chrome icon, or you can type on the botton of your screen where you see search written)

## **For mac**

Safari icon ( describe )

Now you will see a search bar on the top of the browser

Kindly type domain

and press enter

# HOW TO USE THE CRM – FRESH SALES (2.2) EXAMPLE

## HOW TO FILL A FORM

Search

Tjmooremd@yahoo.com Details [View Records](#)

### Tjmooremd@yahoo.com Details

|             |                     |              |                         |
|-------------|---------------------|--------------|-------------------------|
| Date :      | 03-jun-2024         | Lead ID :    | 1000621                 |
| Hour :      | 05-06 PM            | Cx Name :    | Tjmooremd@yahoo.com     |
| Country :   | USA                 | Cx Email :   | tjmooremd@yahoo.com     |
| Form Type : | Printer Support USA | Cx Mobile :  | 7752508060              |
| Brand :     | Hp                  | IP Address : | 174.100.228.46          |
| Model :     | NA                  | Issue :      | Connect Printer To Wifi |

### Form Response

Call Status \*  Connected

Did the cx tell you his name?

Did the cx tell you his printer model name?

Does cx have internet connectivity?

does cx have the computer?

Remote Status \*  Yes  No

Comment \*  cx is good and wants service

Sale Status \*  Yes  No

This a fresh case view-case details will be visible on the top

While catering a case once can select the options accordingly and then press submit

This is an example of how to fill the details



# HOW TO USE THE CRM – FRESH SALES (2.4)

## HOW TO MARK A SALE -EXAMPLE

### Sale Details

|                   |   |             |                                       |                |               |
|-------------------|---|-------------|---------------------------------------|----------------|---------------|
| Sale Amount *     | 249   | Currency    | USD                                   | Company Name * | Zone Firewall |
| Payment Mode *    | Paypal  | Plan Name * | 2 years zone firewall & 1 year mcafee | 2 Years        |               |
| Billing Address * | 200 W 40th St, New York, NY 10018                             |             |                                       |                |               |
| BTTR              | 11:58 PM  | Time Zone   | EST                                   |                |               |
| Future Payment    | <input type="radio"/> Yes <input checked="" type="radio"/> No | System Type | Windows OS                            |                |               |

### Additional Details

|                   |                     |       |                        |
|-------------------|---------------------|-------|------------------------|
| Name              | Spouse name         | Email | spouse.email@gmail.com |
| Alternative Email | abc.email@gmail.com |       |                        |

### Tech Task

?

|            |  |                          |
|------------|--|--------------------------|
| Tech Notes | printer is connected - kindly cleanup, tune and ad blocker | <input type="checkbox"/> |
| Tech Notes | add zone firewall and activate it ( add icon on desktop)   | <input type="checkbox"/> |

### Billing Tasks

|               |  |
|---------------|--|
| Billing Notes | user is a 57 year man, speak slow during billing |
|---------------|--|

Raise invoice request

Sale Status – “YES” then the following details will appear – kindly enter complete details

Add the max number of years in plan details

When adding BTTR details kindly select the correct time zone (GMT, EST,PST,CST, MST)

Add correct tech tasks and billing notes to help the agent understand the case better

Agent will not be able to submit until raise a invoice request is not checked

# PROCESS FOR TECH USER

For tech user there 4 types of cases – Tech sale cases, tech callbacks, tech inbound request and tech inbound cases

## For Fresh cases

Once a case is marked as a sale – it will appear as open for a tech user ( Any tech user can assign a case to themselves by clicking on action button at end of the case

- Dashboard
- Tech**
  - Tech Sale Cases
  - Tech Callback
  - Tech Inbound Request
  - Tech Inbound Cases
- Chat (Link)
- Logout

### Tech

#### Tech Lead

Show  entries Search:

| # | CRN     | LEAD ID | CASE TYPE  | DATE        | COUNTRY | CX NAME       | MOBILE        | FORM TYPE           | MODEL              | IP             | CASE STATUS | ACTION |
|---|---------|---------|------------|-------------|---------|---------------|---------------|---------------------|--------------------|----------------|-------------|--------|
| 1 | 7894706 | 1000527 | Fresh Sale | 03-Jun-2024 | USA     | Jpchloy       | 501-*****46   | Printer Support USA | NA                 | NA             | In Process  |        |
| 2 | 7894705 | 1000513 | Fresh Sale | 03-Jun-2024 | CA      | Trevor Morgan | (613) *****15 | Printer Support USA | HP envy photo 7155 | NA             | Open Case   |        |
| 3 | 7894704 | 1000495 | Fresh Sale | 03-Jun-2024 | USA     | Stanbeltz     | 97*****07     | Printer Support USA | NA                 | 76.130.134.133 | Open Case   |        |
| 4 | 7894703 | 1000474 | Fresh Sale | 03-Jun-2024 | USA     | Roger J Fish  | 704-*****90   | P.T Inbound         | ET -3850           | NA             | Open Case   |        |

# TECH USER-TECH SALE CASES

### Personal Info

|                    |                       |                   |   |
|--------------------|-----------------------|-------------------|---|
| Cx Name :          | Trevor Morgan         | CRN :             | 7894705   |
| Mobile No:         | (613) 299-5115        | Billing Address : | 369 North River Road-unit 407 , ottawa , ontario , canada k1L 8C2 |
| Primary Email :    | morgan8969@rogers.com | Street :          | NA  |
| Atl Mobile No :    | NA                    | City :            | NA  |
| Secondary Email :  | NA                    | State :           | NA  |
| Additional Name :  | Trevor Morgan         | Country :         | CA  |
| Additional Email : | morgan8969@rogers.com |                   |   |
| Relation With Cx : | NA                    |                   |   |

### Tech Task

Remote Transfer Status \*  Yes  No 1

System Type \*  2

Task 1 \*  3

Task Status \*   4

### Add More Devices

5

6  7  8

## Case View - For Tech case

Here we need to add certain details about the case

- 1- Has the remote been transferred successfully
- 2 Agent has already marked which type of system does the cx has if it is correct don't change it ( tech can change if required)
- 3 this is a tech task ( there cab be multiple tech tasks)
- 4- here we need to mention if the tech task has been completed or it is un resolved
- 5- here we have option to add more devices which the user has

After completing these tasks there are 3 options

- Tech work complete
- Sale dropped
- Tech Call back

