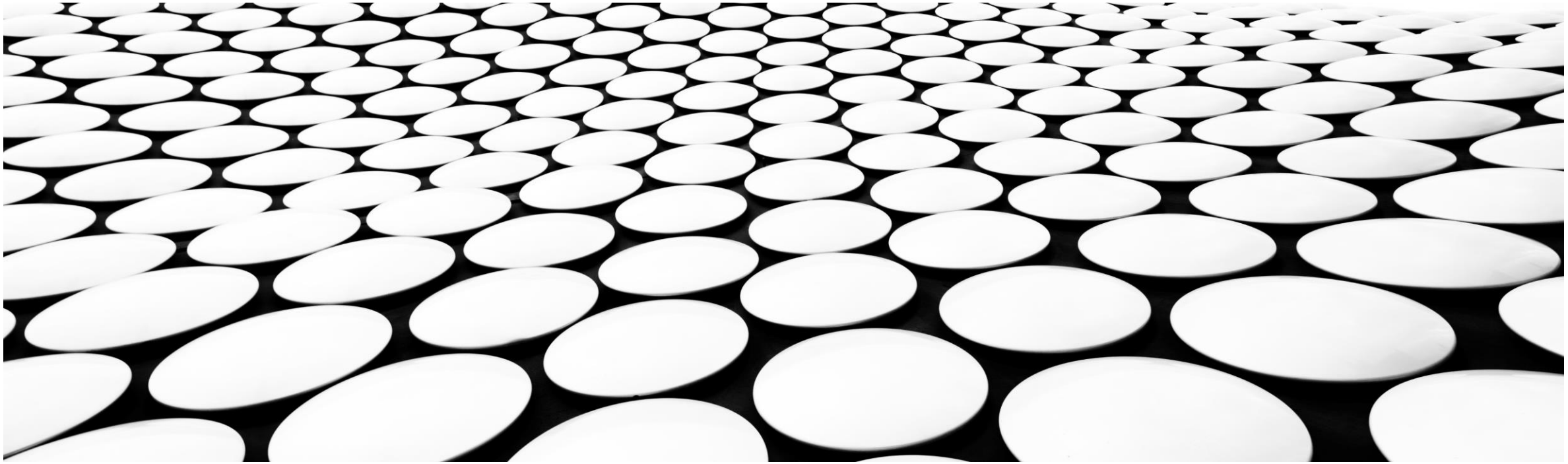
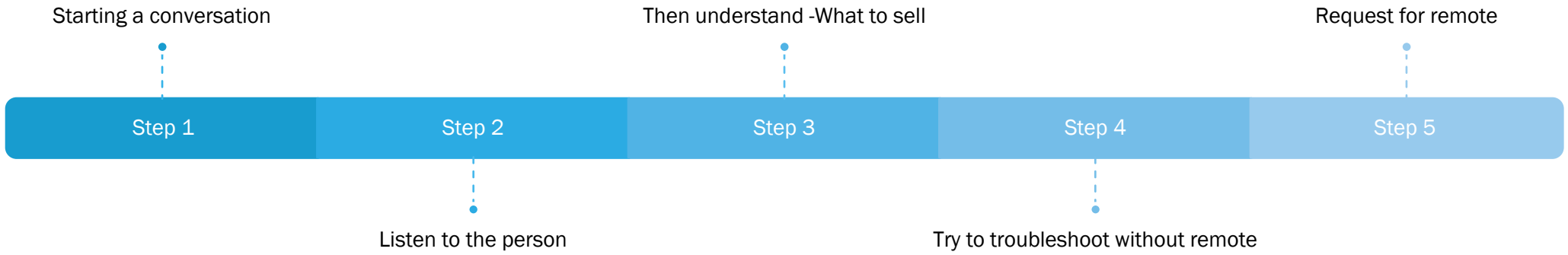
CRM TRAINING

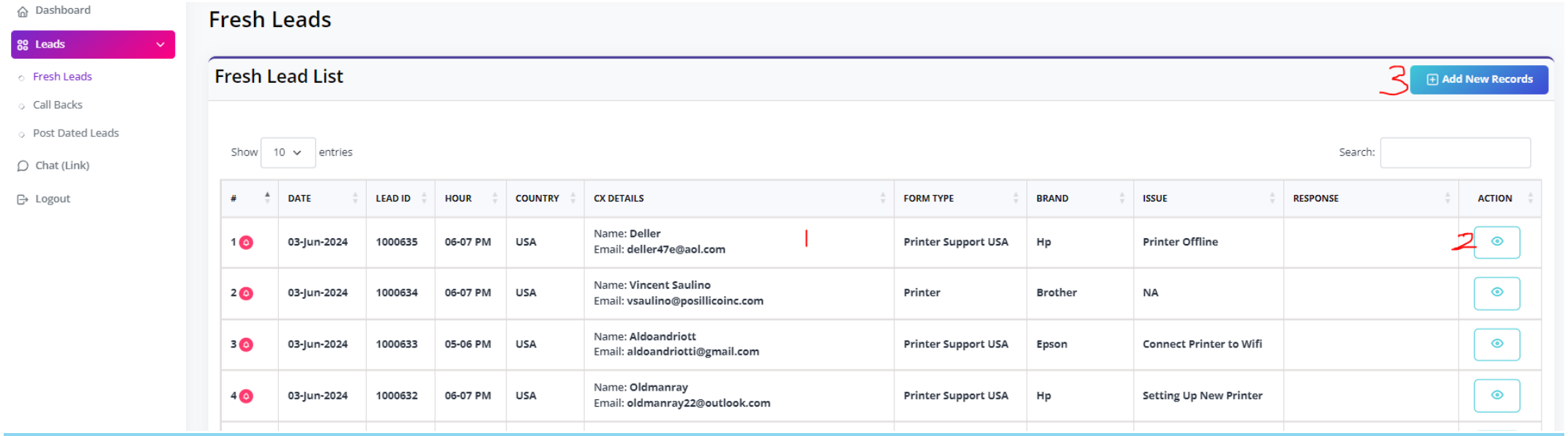
DATE: 8 APRIL 2024



STAGES OF A SALE CALL
FRESH SALES



HOW TO USE THE CRM – FRESH SALES (1)



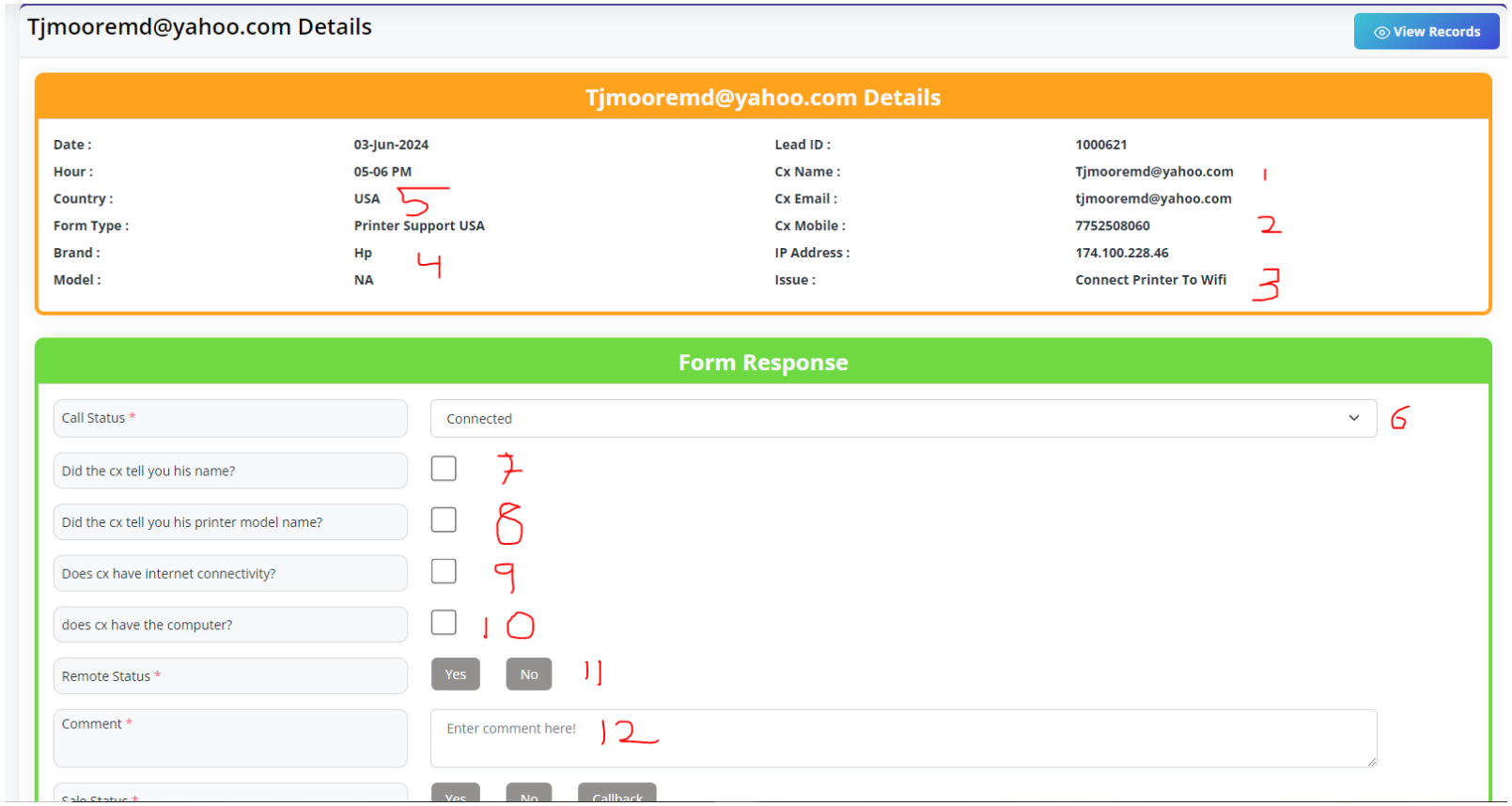
<u>Fresh leads view</u> - all new leads will be visible here

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)



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

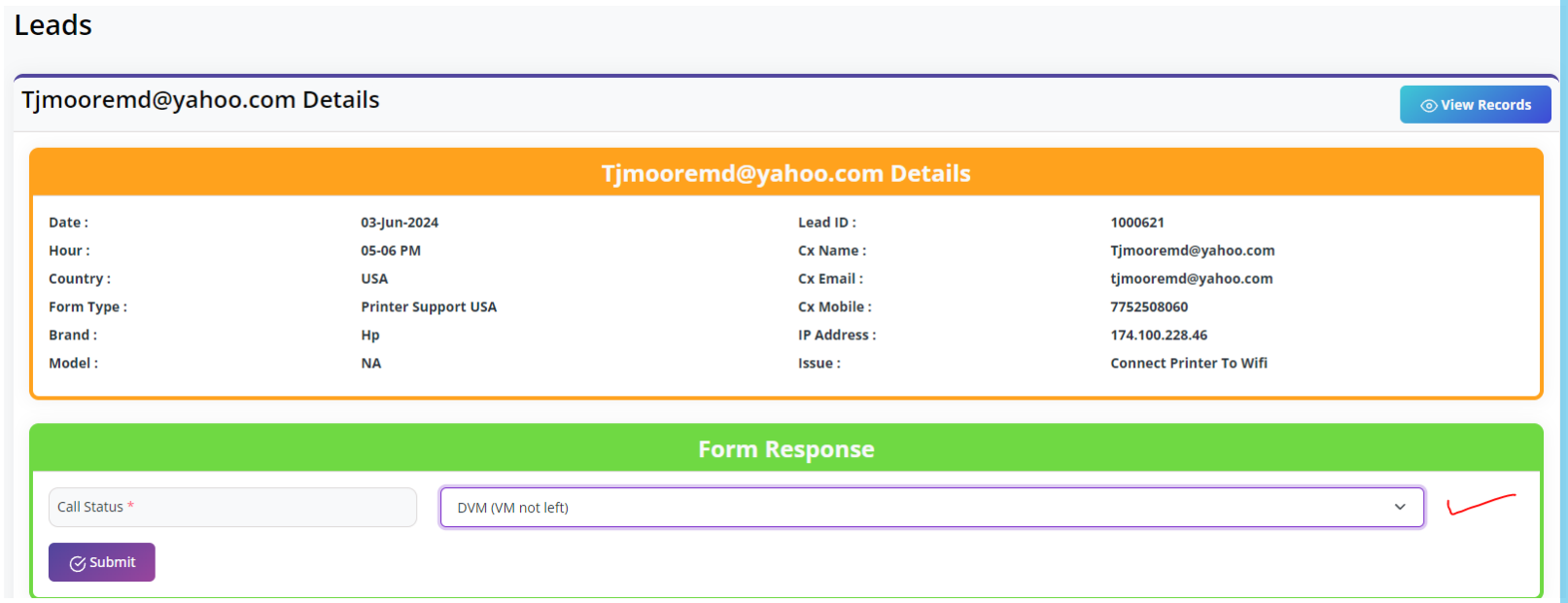
11 If the user agrees to share the remote connection – Mark as Yes

12 – add comment here about the conversation

If cx agreeds 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)



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

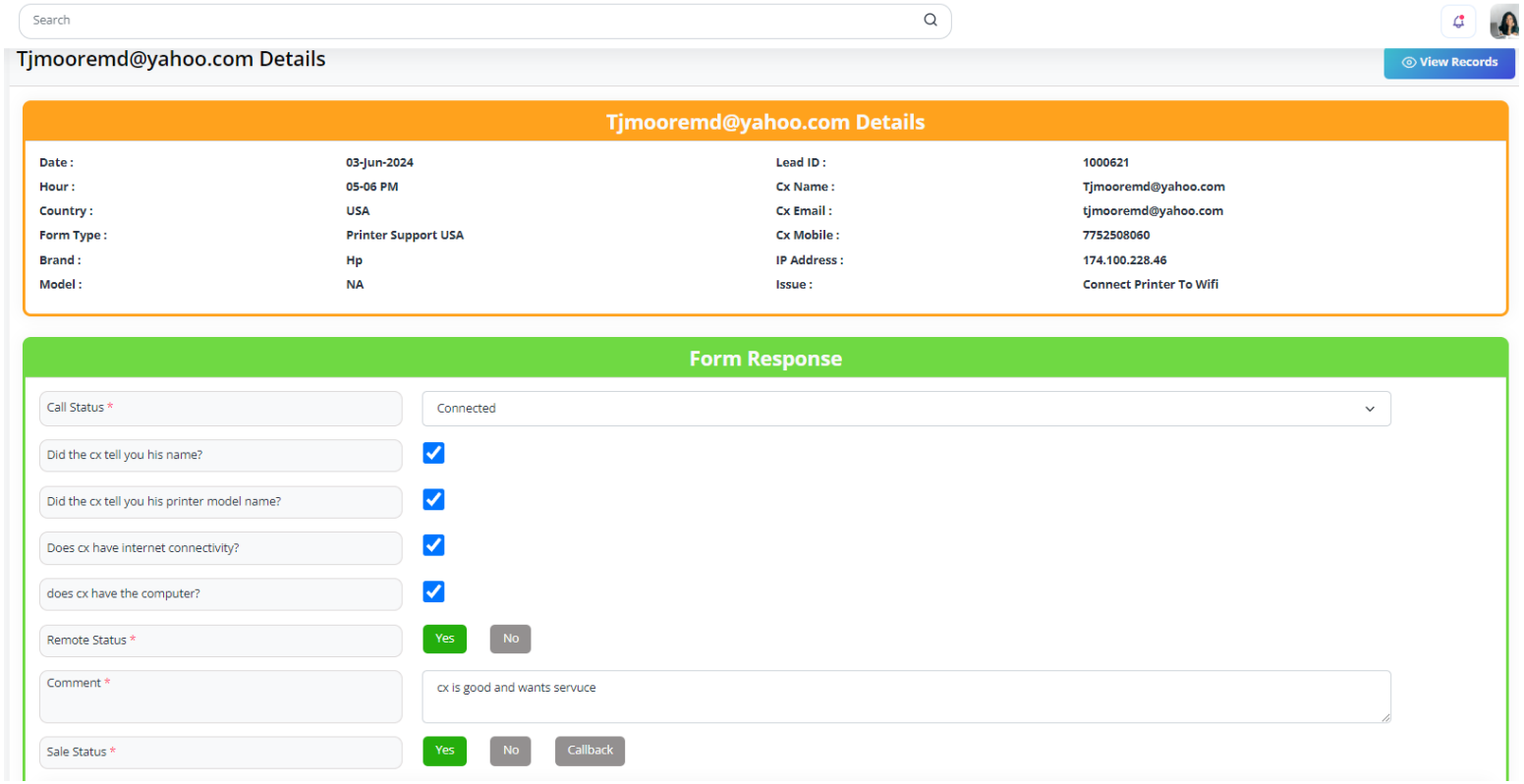
- Would you please try to make a xerox copy from your Printer it self (if printer issue)
- Can you please put a document on flat bad and try to make a copy of that .
- As you are able to make a print , that means there is no problem with the printer itself .
- To resolve this situation , you need to 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 broswer) 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

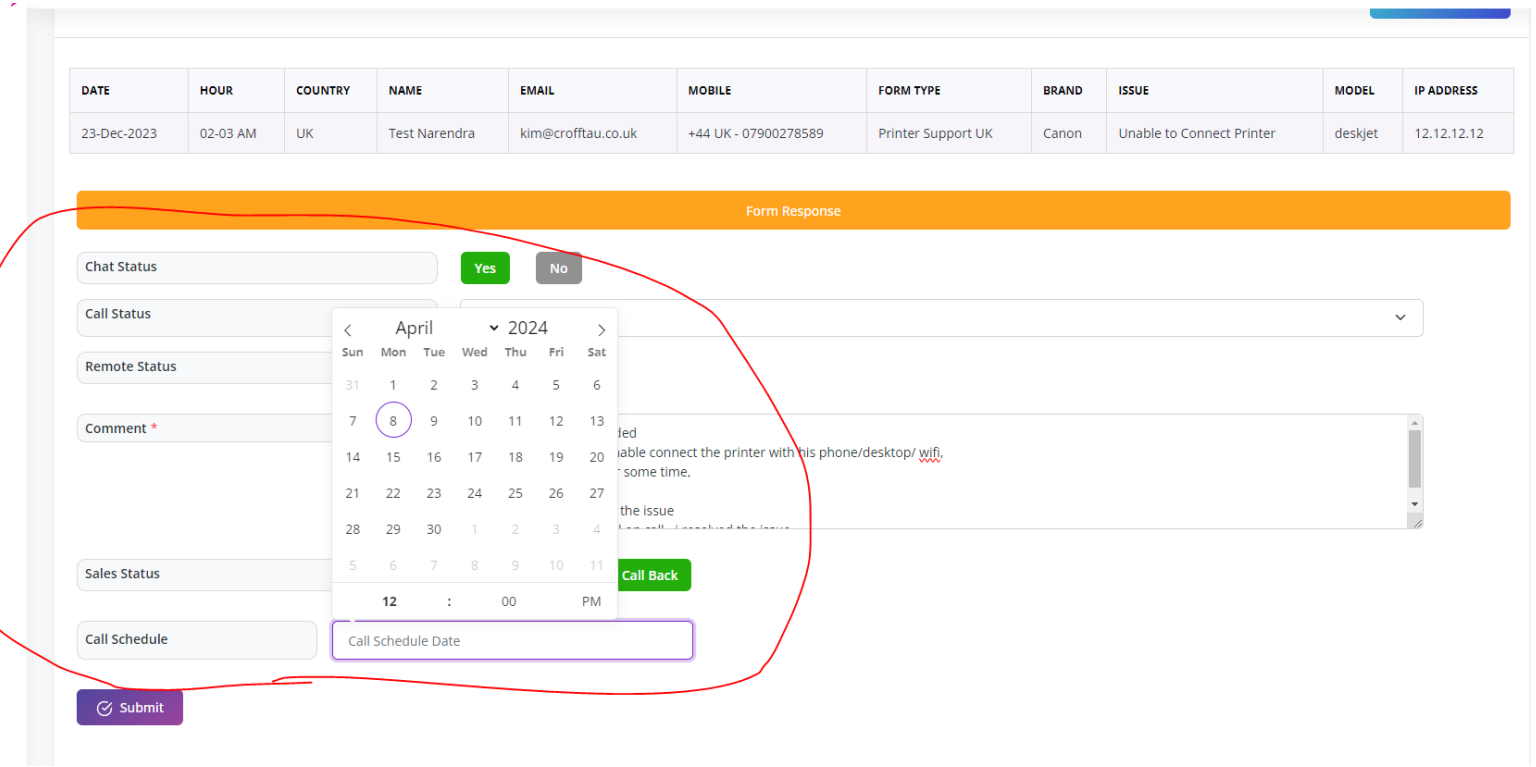


This is an example of how to fill the details

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

HOW TO USE THE CRM – FRESH SALES (2.3)
HOW TO MARK A CALL BACK

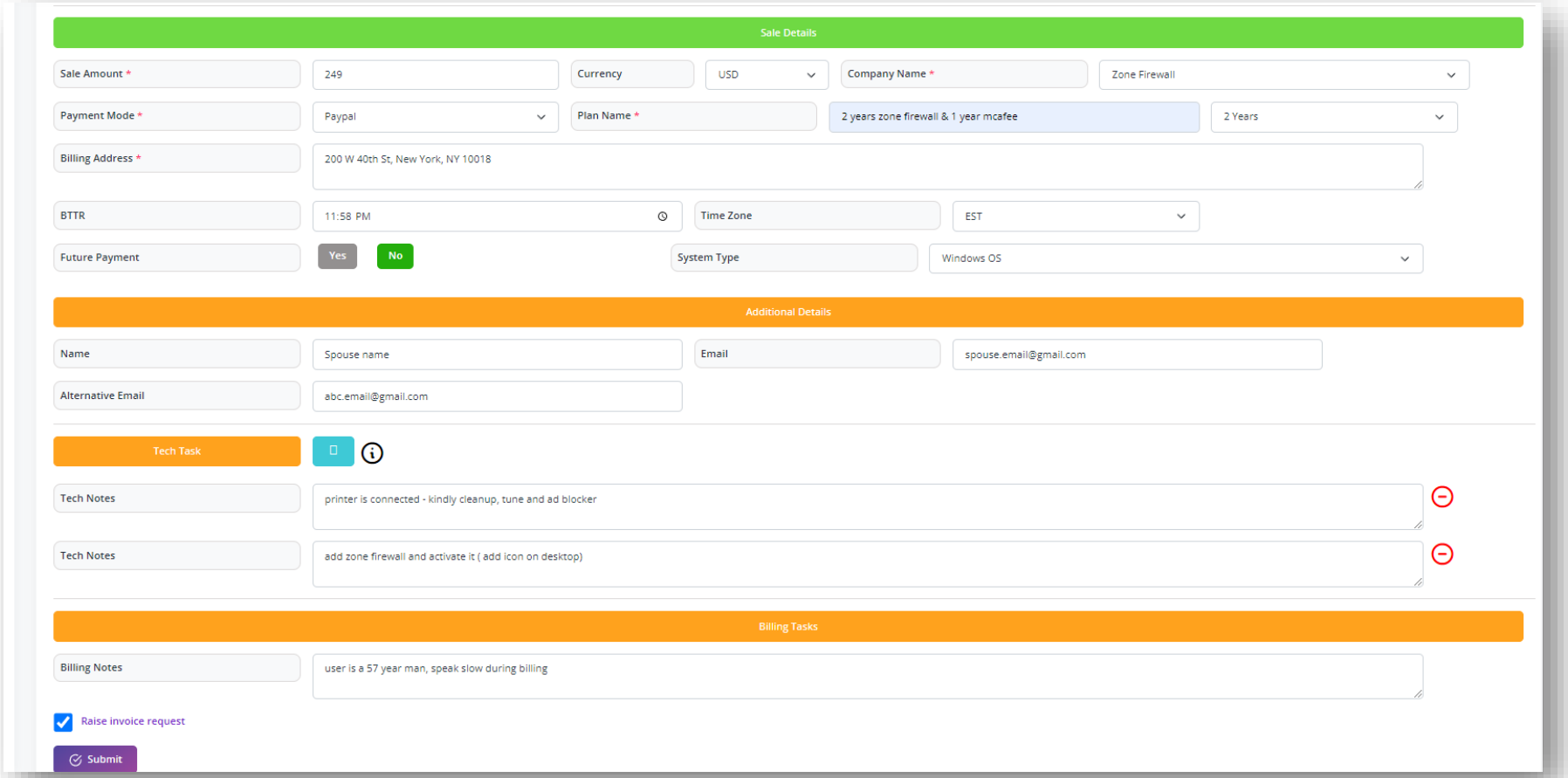


This a fresh case view-case details will be visible on the top

Kindly use the IST format for the call back to be marked and then press submit

Once a case is marked as a call back it will be only visible to that user only

HOW TO USE THE CRM – FRESH SALES (2.4)
HOW TO MARK A SALE -EXAMPLE



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

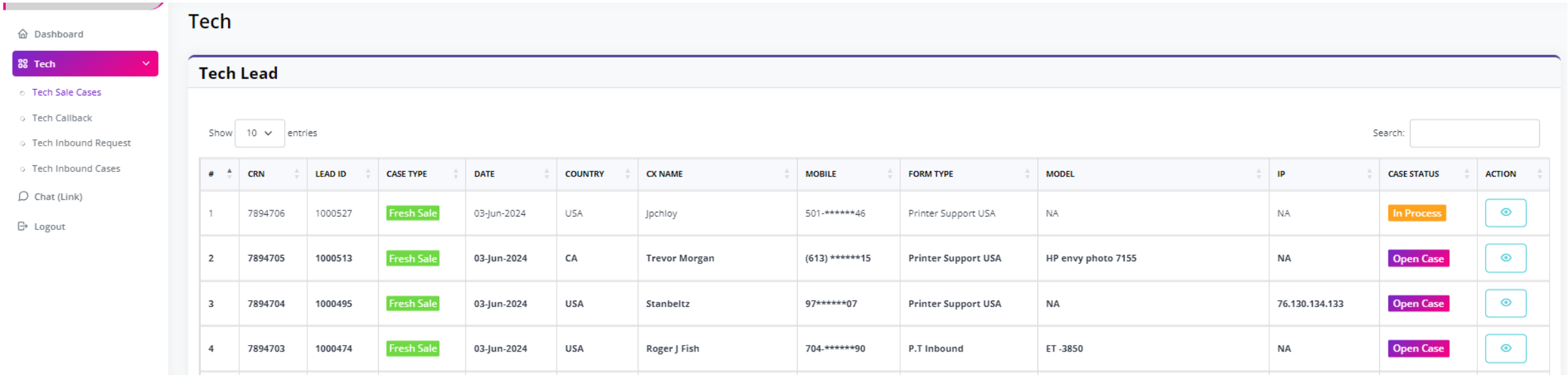
Agent will not be able to submit until raise a invoice request is not checked

PROCESS FOR TECH USER

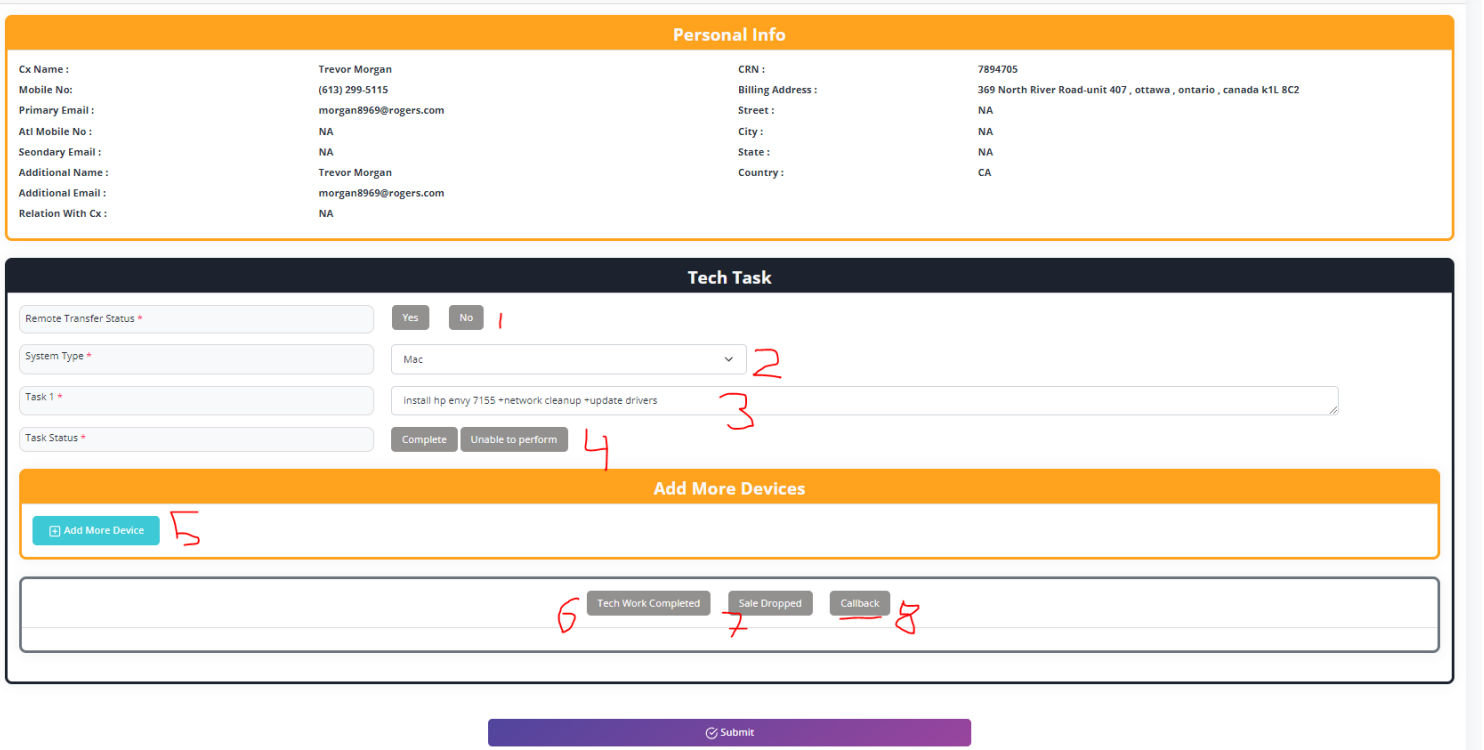
For tech user there 4 types of cases – Tech sale cases, tech callbacks, tech inbound request and tech inbound cases

<u>For Fresh cases</u>

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



TECH USER-TECH SALE CASES



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)

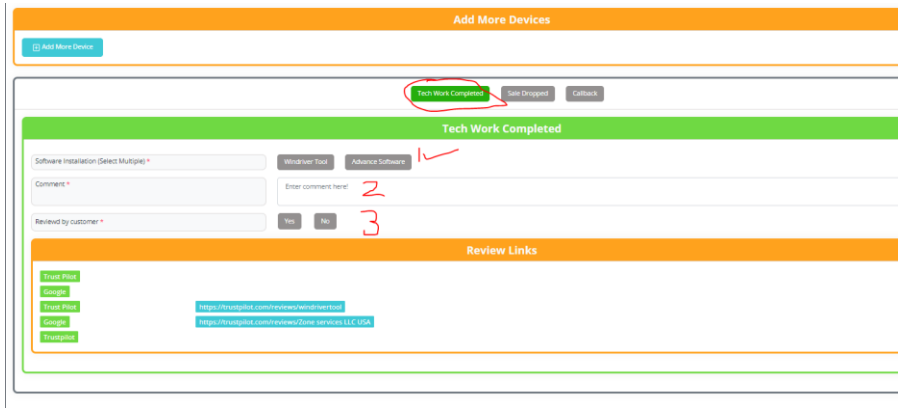
4- here we need to mention if the tech task has been completed or it is un resolved

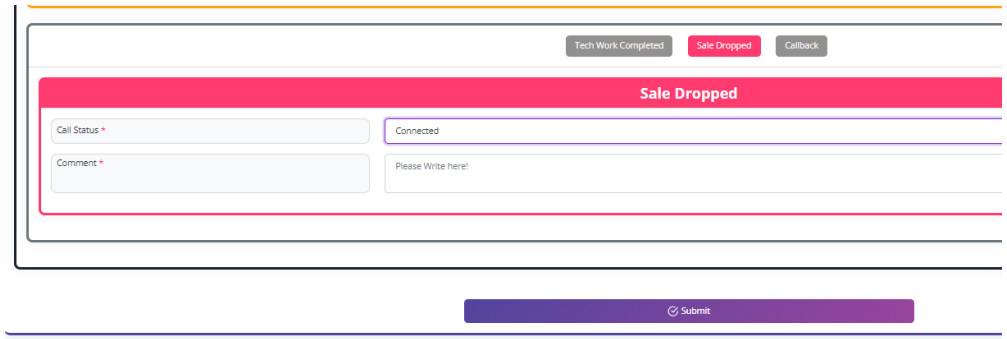
5- here we have option to add more devices which the user has

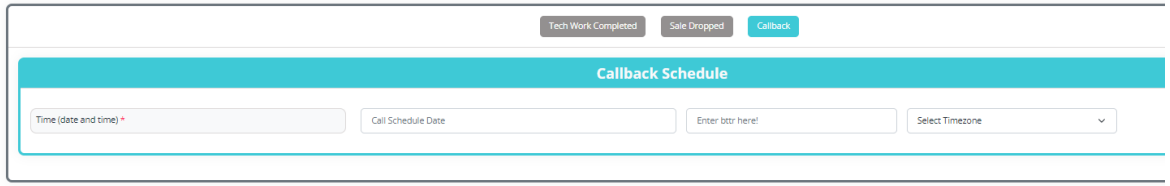
After completing these tasks there are 3 options

- Tech work complete
- Sale dropped
- Tech Call back

TECH USER – CASE VIEW







Tech work complete view

This is the view which appears on clicking on tech task completed
1– where tech needs to add which software has been added
2- add comment for billing
3- where the tech has requested for review from cx or not

Sale dropped

This is the view which appears on clicking on sale dropped
1– here the tech needs to update why the sale was dropped (connected – please add comment here

Call back

This is the view which appears on clicking on call back option
1– here tech can schedule a call for later – please add date and call back time