SysMaster™

SysMaster Support and Sales Automation Server

Key Features

- Automated Support and Lead CRM Management Server
- Unlimited Number of Agent Groups
- CRM Email, Web, Web Chat, and Phone Media Stream Convergence and Tracking
- Advanced Inbound Group and Rule-Based Request Distribution
- Open, Closed and Unassigned Request Management Handling
- ASP CRM Module Support

- Advanced Thread Management Functionality
- Web Chat and Collaboration Server
- Integrated Knowledge Base Server
- Advanced Agent and Group Reporting
- High-Degree of Customization via Custom Commands
- Advanced Product and Inventory Management

Problem

Corporate Sales and Tech Support teams need a comprehensive CRM server to handle and distribute inbound email, web, web chat, and phone requests. The system must be scaleable and allow convergence of all data streams into one, consistent request tracking system. In addition, the system must support various communication methods to allow flexible client support and sales service.

Solution

SysMaster CRMaster Support and Sales Automation Server allows advanced data throughput management for support and sales groups. The system includes email, web, web chat, and phone media stream channels to allow smooth inbound data indexing, management, and distribution. The system captures all available data streams into one for consistent and efficient request processing. Targeted at businesses where sales and support are considered critical success factors, our solution helps streamline sales and support operations and dramatically improves agent productivity and customer satisfaction. The solution includes Support and Lead Management, Sales Automation, Web Chat and Knowledge Base Modules and allows high degree of end-user customization.

SOLUTION FEATURES

Automated Support and Lead Management Server

The SysMaster Sales and Support Automation CRM Server is designed to ensure fast response to incoming customer and lead requests. The system supports unified messaging and handles email, phone and web requests. All requests are indexed, time-stamped and distributed to agents for processing. System administrators define agent groups and set of rules about how requests will be distributed. The system tracks a number of variables, like request volume, response times and agent workload, which are used to monitor the quality of sales and support operations. Through automating the handling of customer and lead requests, the system shortens response times, reduces errors, and increases customer satisfaction.
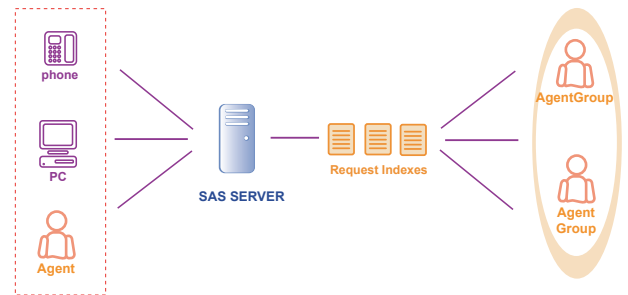
Unlimited Number of Agent Groups

The SysMaster CRMaster server supports unlimited number of custom defined groups to allow multiple teams to operate in parallel and if necessary share data view. All defined agent groups can handle unlimited number of inbound requests for scaleable inbound throughput. The system can assign custom rotation methods, inbound media streams, multiple inbound filters to allow high-level of group profiling and targeting. All groups have specialized data views that can be private or public to allow team collaboration. In addition, the group hierarchy consists of Managers and Agents to allow custom ticket assignment, escalation, reservation, prioritization, and general management.

Advanced Thread Management Functionality

SysMaster CRMaster server supports advanced, all Web based ticket/lead thread management functionality. The system supports advanced features such as ticket indexing and ticket history view. Two view types are supported: Nested Three View and Flat Three View that can be switched dynamically. The Advanced HTML Management Toolbar allows content customization, font, color, and paragraph management. The system also allows Spell Checking for response content spell check.

Media Stram Convergence and Tracking

SysMaster CRMaster server supports complete media stream convergence. All inbound requests, are indexed upon entry and assigned to the proper group and agent within the group. There are several media streams that allow inbound request delivery:

- ■ Email Requests - the system captures inbound emails, filters them out based on the recipient email address, and creates a new ticket or merges the email into existing ticket/lead thread.

- ■ Web Requests - the system captures Web requests via specialized Guest Books or/and Leave-a-Message Web forms. Once received the system will attempt to create a new ticket/lead or merge it to an existing data thread.

- ■ Web Chat Requests - the system captures inbound requests via Web Chat sessions that can be statically or dynamically initiated (see the Web Chat CRMaster brochure for more details)

- ■ Phone Requests - the system is connected to SysMaster PBX Server that allows inbound call requests to be captured and assigned to proper agent groups. Once a particular agent is reached via phone the system will create a new ticket/lead or it will try to merge this phone call to an existing communication thread. The system can also route the phone to the agent that handles a particular request via its embedded rule based routing. (see the Contact Center CRMaster brochure for more information).

All data streams are merged into one aggregated thread via the advanced ticket tracking and indexing system to allow single view for all customer related communication.

Integrated Knowledge Base Server

SysMaster Knowledge Base module empowers Sales and Support Agents with the ability to create, maintain, share and leverage knowledge. To answer customer questions, agents turn to the knowledge base for quick answers. Upon resolving difficult issues, agents contribute their solutions to the knowledge base where they become available for use by all users. As the knowledge base grows, less frequently accessed knowledge is pushed to secondary folders in order to increase system effectiveness. Through efficiently organizing and managing company specific knowledge, the system helps agents quickly find answers to customer questions which improves productivity.

Open, Closed and Unassigned Request Management

All inbound requests are intelligently distributed into several major groups. Open Requests are requests that are currently in process of being handled. The open requests feature multiple request flags that allow efficient request handling such as: Queue Wait Time, Answer Status, Support Status, Escalation Level, and Reservation Status. The requests also allow full data item search that includes keywords and content searches. Closed requests are request that have appeared to be finalized. Request close procedure can be manual or automated (if there is no communication for predefined period of time). Once closed requests are automatically opened if a new communication is received. Closed requests can be archived or deleted based on the system settings. Unassigned requests are separated into specialized folder to allow the group manager to assign them manually, or discard them altogether.

Advanced Inbound Group and Rule-Based RequestDistribution

SysMaster CRMaster Server enables managers to define agent groups and select methods for distributing tickets to group agents. The system supports the following distribution methods:

- ■ Rotational/Round-Robin - tickets are assigned to agents sequentially for maximum flexibility and automated lead/ticket distribution.

- ■ Least Utilized - tickets are assigned to the agents with the least workload.

- ■ Predictive - tickets are assigned to agents on the basis of prior customer communication history, so that customers are matched with preferred agents.

   Assigned by Manager - tickets are manually assigned to agents by their managers to allow multi-level ticket management.

The CRMaster server allows flexible workload and ticket distribution to fit any type of CRM environment.
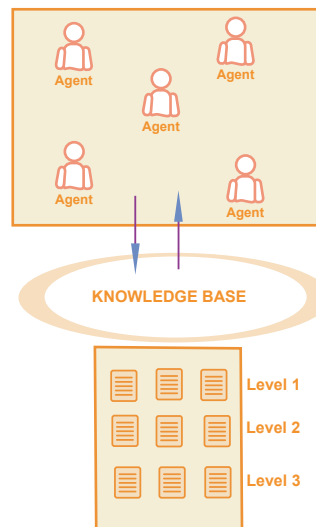
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Web Chat Collaboration Server

SysMaster CRMaster server allows Web Chat with customers to enhance the support and sales operations of companies. Web Chat has an integrated Co-Browsing and Desktop Sharing Functionality for advanced level customer service and support. The Web Chat server supports pre-chat and post-chat registration forms and dynamic web chat initiation which is rule based on time and/or browsing patterns. Online visitors can select their agent of choice or be assigned automatically to an agent by the system. CRMaster server, among others, supports the following advanced features: Co-Browsing, File Sharing, Desktop Sharing, Private, Public and Service Rooms, Custom Transfer, Room and User Management, Customizable Chat Commands and Texts. For more information, please refer, to the SysMaster CRMaster Web Chat and Collaboration Server.

SOLUTION FEATURES

Advanced Agent and Group Reporting

SysMaster CRMaster offers advanced reporting engine to allow agent managers make knowledgeable assessment about the inbound and outbound request throughput, agent response times, and request handling procedures. Beyond productivity and workload analysis, the reporting feature is designed to facilitate procedure optimization and throughput increase initiatives.

High Degree of Customization via Custom Commands

SysMaster CRMaster Server allows a high degree of end user customization. With a click of a button, users can define system rules, menus and objects to customize different aspects of system behavior.
The system allows managers to create custom commands and rules for increased communication channel availability and higher agent request throughput. Some standard custom features include: pre-canned email and web chat responses, phone call routing, manual agent selection with personalized photographs, advanced ticket management, and customizable web form objects.

CUSTOMER
MANAGEMENT
KNOWLEDGE
CONTENT
SYSMASTER
SAS
MANAGEMENT
MANAGEMENT
SALES
SERVICES

Advanced Product and Inventory Management

The Sales Automation module automates the process of creating, retrieving, and managing information about customers, products and inventory. The system enables sales agents to check inventory availability and pricing prior to making custom quotes to reduce errors and customer dissatisfaction. Upon inventory verification, agents create orders and reserve products for shipment to customers. The system also enables sales agents to retrieve and update information about customers' purchasing history and contact information which helps them offer more personalized service.
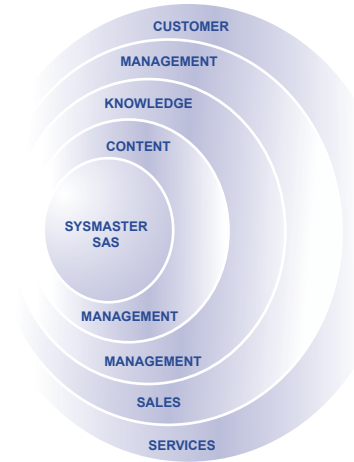
Application Service Provider (ASP) Functionality

SysMaster CRMaster offers unmatched ASP functionality to allow companies to offer ASP services that require high degree of CRM management to third-party companies. The ASP module allows server partitioning and customization where SysMaster Server Managers can create customer accounts and give privileges to customer group managers to manage their own data streams and agent groups.

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CRM Support and Automation System