

NETWORK BUSINESS SYSTEMS

SOFTWARE SYSTEM DOCUMENTATION

TELEMARKETING

FEATURES

- Outbound system for call management
- Call scheduling functions
- Call management functions
- Targeted calling or prospecting
- Call script/manager notes are on line
- Note codes for call information management (edit, non-edit)
- Sales representative code controlled
- Call priority
- Options menu for full customer support
- Forced scheduled call back based on system parameter
- Carries customer information thru all options
- Calendar on line for call time management

REPORTS

- New contact list
- Orders taken per sales rep
- Orders shipped per sale rep
- Order taken by state by rep
- Orders shipped by state by rep
- Phone call analysis
- Commission reports

INTEGRATED WITH:

- Sales Distribution
- Inventory system
- Order Viewing
- Return Merchandise Authorization
- UPS Manifest
- Accounts receivable
- Bill of materials
- Mailing list

SYSTEM OVERVIEW

IBS's Telemarketing module is another great example of true seamless integration. This system was designed to allow the sales representative to handle all sales and customer service functions from their desks and work in a paperless environment, in the most demanding sales systems. Time management and mobility is efficient and well thought out for maximum user friendliness. The use of this system can provide one of the most powerful sales/marketing tools available. Consistent delivery, follow-up, and focused communications give almost immediate results and market knowledge for Company direction. Reactions to market swings, new competition, and market needs are all improved due to more contemporaneous information.

All the IBS (IFF) functions are present in the telemarketing system, which really make up the powerful functionality of the system. The main concept is that you will always be working from the customer master file, no matter what you are doing.

One of the primary concepts applied to the design of the IBS Telemarketing system is that since the system is based on customer management, you will always be working from the customer record to do business. Again, you will always start out with the customer data on screen so you know with whom you are dealing with as you provide sales and sales support functions. Typically, your sales and sales support personnel will operate from either the Outbound or Inbound programs the majority of their time spent on the system. This is the consistent method that is built into the IBS Telemarketing system. If you have your department working from within the main programs, everybody will be operating the same way providing a smooth and consistent customer interface.

The Telemarketing module is an optional sub-module of the Sales system.

CALL MANAGEMENT SYSTEM

The IBS Telemarketing system is full sales system and customer service software, centered on a call management system. This system allows you to schedule calls for customers and manage your call load. How it works is very simple. Within each customer master file is a flag for "CUST PROFILE: (S=EXTENDED INFORMATION)". When the "S" is entered in this field, a third screen is offered in the customer master record.. program "Enter/Edit Customers:CMMMAINT". You can read in detail about this information in the customer master file program document "CMMMAINT.PD". The important issue is that by having the "S" present in this field, this customer is now available to be scheduled for call management in the IBS telemarketing system.

As you save the customer master record with the "S" filled in, the program asks you "DO YOU WANT TO ENTER STOREFRONT PROFILE INFORMATION Y". You will want to enter in on this "Y". This is when the third screen appears. You will enter in the initial call back schedule at this time, including some demographic information on the customer and the days that the customer is open for business calls. These days open flags will also control when the telemarketing call management system allows you to schedule a call back for this customer. In other words, if you indicate that the store is not open for calls on Fridays, then the call management system will not allow you to schedule a call on any Friday.

You can also indicate that the first call is to be on a priority basis, so that it appears at the top of the call screen during the telemarketing session.

Now, in the system setup file there is a field "TM SCHEDULE LIMIT-#DAYS". This field allows you to control the range or limit as to how far your sales department can schedule a call back, in days. So, if you place a "90" in this field, then the system will allow a maximum of 90 days from today's date for a scheduled call back. Even if the customer says no today, maybe you want him to say no every 90 days. After all, you may have something he wants by the next time you call him!

OUTBOUND SYSTEM

The outbound system is the primary IBS call system used for managing the sales department. You will need to know your sales rep code to enter into the system. There is no prevention from using any valid sales rep code. This means that you can stand in for someone

else, or in the case of a department supervisor you can look up and review another person's calls.

You can also change the date to have the system display calls based on whatever date you wish to enter. Generally you will use the system date that is automatically loaded up. If this date is not today's date you should contact your supervisor to have it corrected.

The system forces you to look at the manager's sales note before you get to your scheduled calls. When you enter past the notes, you will be in your primary telemarketing screen, which presents any past due and current calls with totals at the top. When you do this, you will see a list of all scheduled calls in priority and date order. You are now ready for business!

As soon as you entered in your sales rep code and pressed the enter key, the (IFF) functions were made available. Primarily, the F1 and F7 key are active. When you get into your scheduled calls, you will be able to choose the customer you are ready to call.

You will highlight the customer you are going to work with and press the enter key to bring up the main customer screen. At this point you use the (IFF) keys to process orders, check orders, etc. It is advised that initially, you attempt to make the call and tell the system that you are in the call mode. This is discussed below in the section on "TIME TRACKING".

UNSCHEDULED CALLS

One very powerful capability once within the inbound system is the ability to find customers that are not scheduled for a call. You may choose to do this when you have no scheduled calls or maybe when a hot special is handed to the sales department that needs to be moved on. You have the ability to find customers with a combination of sales rep or no sales rep code, state or no state, in alphabetical order or by largest buyer first. After you have chosen your selection method, you will have a screen of customers just like the scheduled calls screen.

INBOUND SYSTEM

The inbound system is basically the same as the outbound system. The main difference is that time is not tracked in this system because it is intended to be used primarily for sales support personnel, who interface with the outbound staff. Also, the scheduled calls are not displayed in the inbound system. Instead, you go right into a customer browse or locator screen, with all (IFF) functions.

Again, this system can be used possibly for non-commissioned sales support personnel to work with. Notes can be placed in the customer telemarketing note system. Calls can also be scheduled for the sales rep, as a priority.

Another use of this system could be where you take in customers by mail or phone in a certain division of customer support personnel that set up the customer account in a controlled manner and plan them for the actual sales rep.

TELEMARKETING SALES REP

Stored within each customer master file record is a field called "REP CODE". This is the telemarketing rep code. As you enter into the telemarketing system you are required to enter in your sales rep code, or any valid rep code. This simple process selects all the customers that have that rep code stored in the customer file and ultimately presents them for

calling based on scheduled call dates. There is a program to change an existing rep code to another rep code, and a program to change the rep code based on state and/or zip code. The telemarketing sales rep code is stored in each order detail record (MASTERLN) for the purpose of extracting sales reports based on telemarketing rep. Keep in mind that the rep code is stored in the customer master file, so if you are standing in for someone and taking orders, the sales rep that is stored in the customer master record will be transferred into the orders. This is regardless of who processes the sale or order. This means the original sales rep will by default get credit for the sale. If you want this to change then you must change the rep in the customer file prior to processing the order in order to have the temporary or stand in rep get credit for the sale.

MANAGERS NOTES

The system provides for sales notes that must be looked at when you initially get into either the Inbound or Outbound system. This can be used for a script, for sales specials, terms, etc. You have the ability to recall these notes anywhere in the system so that you do not have to remember anything in the notes, just that they are there!

CALL NOTE CODES

As you make calls to customers, you will be required to enter in information about the call based on the call note codes you choose to setup. You can have notes for certain events, like BUSY SIGNAL; CALL BACK LATER; NOT INTERESTED; and FRELANCE notes for typing general notes. You will use this code the most. This area is for notes that are taken during your call. There is a purge routine that allows you to delete telemarketing notes when you have accumulated for a long period of time. NOTE: the call notes are stored in separate database that tracks the notes per the telemarketing rep code, as stored in the customer master file. If you change the rep code in the customer master file, you will be prompted to change the telemarketing notes automatically. You will normally want to do this so that all notes on any customer follow along with the new sales rep. You do have the choice to not transfer the old notes also.

TIME TRACKING

The system tracks the time you deal with a customer in the "OUTBOUND" system only. After you have chosen a customer that you are going to call on, you will hit the F6 key to activate the call time tracking system. You will be able to enter in the call notes which track the time you hit the F6 key until the time you exit the customer file and enter in a mandatory call back. During the time you are under the F6 call time tracking, you should conduct all business with this customer utilizing the options menus and (IFF) functions. This will result in the ability to generate a report of the actual time spent working with each telemarketing customer and ultimately call analysis data that help assist in telemarketing management. As a general rule, you should use the F6 key when you are actually in the call mode...specifically right before you actually pick up the phone and make the call. This will result in more accurate time analysis.

TELEMARKETING CALENDAR

One powerful feature in the IBS Telemarketing system is the built in calendar. Within the F7 options menu is a choice for the Telemarketing calendar. This calendar can be used to manage your call load, and displays a whole month of scheduled calls with the current day highlighted. You can page down to the extent of the call limit as set up in the system setup file. You can also press the enter key on a day of scheduled calls to see exactly who you have scheduled for calls on that day.

BASIC SYSTEM OPERATIONAL FLOW

The operational flow will be primarily call activity controlled through the main program "Outbound Telemarketing:TMMAIN". Beyond this call analysis and commission reporting provide tangible evidence as to the performance of the sales department. Consult with NBS regarding telemarketing techniques.

1. **"Outbound Telemarketing:TMMAIN....**This program centers all sales activity in a consistent and coordinate manner. Your sales staff may need only to automatically jump into this program for ease.
2. **"Manager Notes Entry Program:TNGRNGUT....**Enter in the notes you want all telemarketing sales personnel to see.
3. **"Note Code Entry:TMMASGUT....**Enter in the note codes for use in the telemarketing note entry system. You can flag the notes as to changeable or not. NBS suggests note codes for busy signals, call back later, not interested, freelance typing, first call, final call, etc.

SYSTEM SETUP REQUIREMENTS

IBS Telemarketing is an optional system fully integrated into the IBS Distribution and IBS Inventory main systems, and assumes at least these two functions have been fully set up and are operational. Additionally, you will need to verify the set up of the following files:

System Setup File:SYSGUT

Managers Notes Entry Program:TMGRNGUT

Note Code Entry:TMMASGUT

MENU STRUCTURE/PROGRAM DOCUMENTS

2. SALES/CUSTOMER MGMT

MENU #1

6. TELEMARKETING

MENU #1

1. Outbound Telemarketing:TMMAIN
2. Inbound Telemarketing:CSMAIN
3. Manager Noted Entry Program:TNGRNGUT
4. View CS Managers Notes:CSVWNOTE
5. Note Code Entry:TMMASGUT
6. Phone Call Analysis Report:TANAL1
7. Sales Associative Incentive Rpt:TMCOMISS
8. Delete Telemarketing Notes:TMDELNOT