

# White Paper

The simPRO Call Center module

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In a high volume service organisation the Call Centre is the entry point to the business and is often how customers interact with it. Taking a high volume of incoming phone calls and emails and turning them into a positive result for both the business and the customer is crucial.

In these low margin environments, room for error doesn't exist. Making a positive impression is important and closing the enquiry to create and maintain a happy customer is paramount to success. To do this however, you need well-trained, customer-centric staff with access to the correct information at their fingertips.

## Your choices

### In-house Call Centres

So which way do you go with a call centre? In-house call centres are great if you are likely to be using the resource full time and the volume of work justifies that expense. The downside to having your call centre in-house is the much higher overheads to run it and the initial set up costs.

### Outsourced Call Centres

Outsourced call centres are great for scalability, allowing you to ramp up and down your capability as needed. On the downside, this often requires the use of operators that are working for multiple companies. This could result in companies using lesser trained operators not up-to-date with your offerings and disparate systems. It also allows for the potential stigma associated with call centres being based in another country.

## The simPRO Call Centre

The simPRO Enterprise Call Centre module will work in any environment and has specific tools inbuilt to ensure your business gets the most out of either the outsourced or in-house model. simPRO Enterprise Call Centre is a highly-customisable dashboard for creating leads, quotes and jobs and retrieving details about all activities in a single page. Being browser-based, the Call Centre module has been specifically designed to be able to train new users rapidly in either an external or internal call centre environment without granting access to the main system.

The screenshot displays the simPRO Enterprise dashboard for a user named Curtis Thomson. The interface is divided into several sections:

- Project Search:** A search bar with a [refresh] [reset] button.
- Project Job #26947:** A detailed view of a project job, including:
  - Company: AA Fire and Training
  - Site: Head Office
  - Site Address: 27 Massetts Road, Horley, Surrey, RH6 7PR
  - Site Contact: Brian Beesley
  - Phone: 01293 776698
  - Zone: None
  - Salesperson: John Walsh
  - Created: 28/01/2014
  - Status: 4b. Job in progress on site.
  - Request No: None
  - Order No: 00001
  - Price: £432,880.83
  - Invoiced: £0.00
- Customer Notes:** A table listing notes with columns for Date and Subject.
 

Date	Subject
22/07/2014 11:10	SW cust regarding project hjsdklvcgskdjgvlkSJDBV
18/02/2014 16:34	spoke to Ash on .....
02/05/2013 12:26	arron to call customer friday
12/05/2014 13:21	SW Client and booked meeting
19/09/2013 18:27	bhknjk
	Emailed
- Attachments:** A section indicating there are no attachments on this job.
- Project Description:** A text area containing a message: "Dear xxxxx, Thank you for the opportunity to provide this proposed solution to supply and install The equipment listed below. We assure you of our best Intentions at all times amd all equipment comes with 12 Months Labour Guarantee and Standard manufactures Guarantees. To avoid long lead times could you please advise your Intentions to proceed with a minimum 7 days".
- Project Notes:** A text area currently containing "None".
- Cost Centre Details:** Shows the cost centre as "stage one build - #2586 Electrical Installation".
- Schedule Booking:** A calendar grid for the week of 21/07/2014. The project is not booked.
 

	Mon 21st Jul	Tue 22nd Jul	Wed 23rd Jul	Thu 24th Jul	Fri 25th Jul	Sat 26th Jul	Sun 27th Jul
AM	YES						

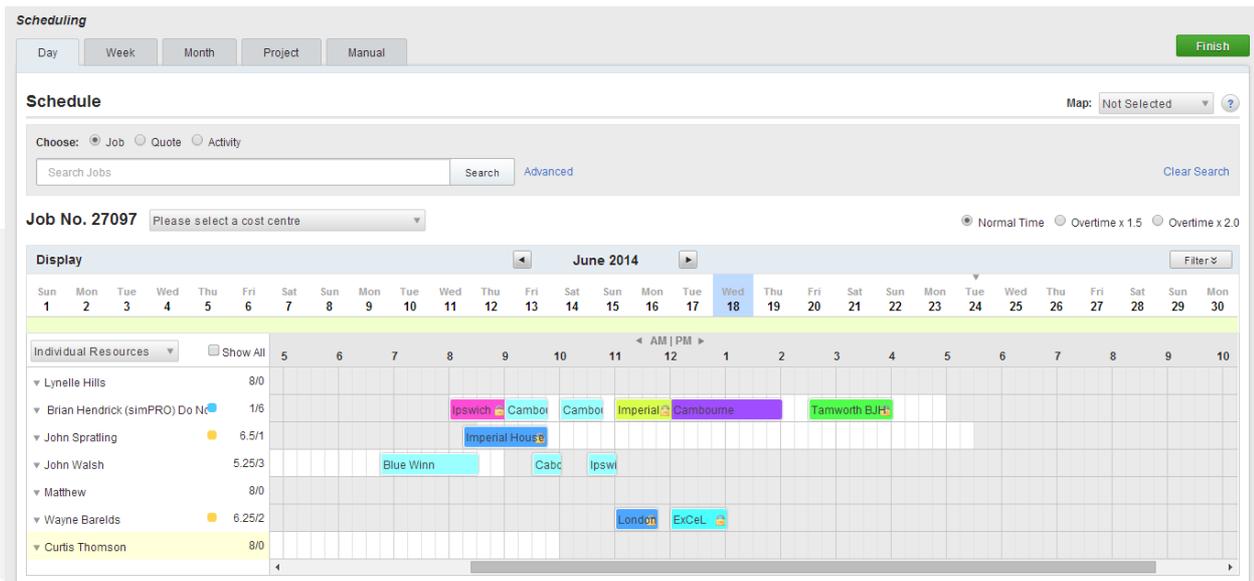
The simPRO Enterprise Call Centre module typically gets deployed in environments that have a high volume of repetitive activity where the end result is sending an assessor or engineer to site to carry out work. Organisations that have used the Call Centre module in the past have used it to manage the inspection, quotation and installation of systems such as solar systems, water tanks, hot water systems, internet connections, home entertainment systems, pay television systems, home and furniture repairs and insurance work.

## From the Call Centre to simPRO Enterprise

The workflow in the Call Centre module is fairly basic as it's designed to act like a dashboard of interconnecting parts where updating one piece of information updates the rest. This allows for high levels of customisation to suit a specific workflow, where the system can guide operators through interactions with customers.

These interactions can be in the form of a simple tick-and-flick sheet to create an activity or can be a complex set of questions which can ask follow up questions based on responses and create complex quotes or activities. Usually, the next stage of the workflow is to schedule a time for a technician to make a site visit to install or inspect a system and to provide recommendations.

The system can also suggest time blocks to send out field staff to the call centre operator, which then transfers through to the main system schedule and appears on the field engineer's phone, tablet or runsheet of activity.



Thereafter, the power of simPRO Enterprise is realised. Enterprise manages every stage of the activity through to completion. This can include managing the job through the various stages, scheduling the work to staff or contractors, managing the job costs, dispatching the work order to the field, reporting back on the job with time and materials used from stock or purchase orders and then through to invoicing.