How to / Checklist for Team Loyalty

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Step 1. Preparing for the Call

Begin by finding a contact who hasn't been claimed by a current employee. I find it helpful to sort all open CLA cases by account (the dealership). This way you can see if there are any duplicates of contacts under the same dealership. If you notice this, please let Eric know so they can be merged.

Claiming a Case as Your Own

- ❏ Go into Open Cases (or Team Loyalty)
- ❏ Change Case Owner to your name
- ❏ Close out any previous open activities. You will see these under Open Activities, not Activity History
- ❏ In a new tab, see contact's most recent cases. This can be a good indicator as to whether this person still works at this dealership or not.
- ❏ It might also be helpful to check the dealership's page to see which contacts have CLAs created, and of those, which are completed or are in progress.
- ❏ I also like to compare the phone numbers. Sometimes they are different under the dealer vs the contact.

Now You Are Ready to Make a Call!

There are two ways in which you can log a call.

1) Log a Call Under Activity History
2) Log a Call Under Open Activities

To Log a Call Under Activity History

- ❏ Hit "Log a Call"
- ❏ Make the subject "Customer Satisfaction Call"
- ❏ Make sure it's assigned to you
- ❏ Verify the CLA Case number is correct
- ❏ (Optional) Add in contact name (the person you are initially calling for). This is optional, however, I like to do this for follow up tasks.

- ❑ In comments, write in “called to collect CSS, or called to capture CSS” and then add in notes from call. See Step 2.

To Log a Call Under Open Activities

- ❑ Hit “New Task”
- ❑ Follow all the same steps as before.

Step 2. During the Call

Note that we do not want to sound like robot cyborgs (you’re welcome, Boston). Scripts are helpful for talking points, but not word for word verbatim. If you feel you would like to create a script for yourself, that is perfectly alright. Our main objective is to collect their CSS rating, which is satisfaction on a scale from 1-10. If they are enthusiastic, we may also ask if they’d like to be a referral for us. Use your discretion for this.

So You’ve Made Contact

Awesome! At this time, there are two situations that could occur. You have either discovered the person you originally called for works at this dealership or they do not. Make sure all of your notes reflect these findings and mark those who no longer work there as “Inactive Contact” under the CLA case.

They Still Work There

- ❑ In the comments section, keep track of everything they said during the call.
- ❑ Verify their position and primary location
- ❑ CSS score (1-10)
- ❑ Any and all notes from the call, including if they answered or if you were unable to talk with them. If it’s a voice message , see Step 3. After the Call.

They Do Not Work There

- ❑ Verify new contact.
- ❑ Note in the comments of the old contact who the new contact is.

- ❏ Mark this task (from the old contact) as complete under “Status” and save.
- ❏ After saving this call, go back to the main CLA case for the initial contact.
- ❏ Click mark the “Contact Inactive” with a check. This will then complete the case and mark the “CL Satisfaction Score” as “Unable to Contact”. There is no need to go back to the Contact’s page, as they will already be marked as “Former Employee”.

Step 3. After the Call

Yay, you’ve completed a call! But there are some very important steps to still remember after you’ve hung up the phone. After calling, there are a few different scenarios. New Contact, New Contact: Made Contact, New Contact: Didn’t Reach Them, Current Contact, Current Contact: Made Contact, Current Contact: Didn’t Reach Them. If you discover a different situation, speak with Eric and have him help you. He’s the Manager for a reason! This also goes for creating support cases for the people we get in touch with.

New Contact

The most common occurrence after a phone call is discovering a new contact for the position you were calling for. This can be tricky, but with this simple checklist, hopefully we can catch errors before they occur.

We do not always need to create a new contact under the dealerships page. So the first step is…

- ❏ See if they already exist under the dealership page. This can be found under “Contacts”. You can either expand the list or go to the contact page.

If you find them, great!

- ❏ Check to see if they already have a CLA case created for them
- ❏ If they do, add your call to the already existing case by logging a call and then update the score and contact date. Follow the steps for logging a call, as shown above.

If you didn’t find them, then it is alright to create a new contact for the person you actually spoke with. When creating a new contact, try to obtain their official title and the correct spelling of their name.

Once you’ve completed these steps, then there are two after that:

New Contact: Spoke with Them

Awesome! One less person we need to reach out to! Keep in mind, a case in NOT complete unless you receive that CSS score.

- ❏ Under their CLA case, make sure you've written in your copious notes. Please also add in who you originally called for.
- ❏ Change "Status" to "Complete".
- ❏ Hit "Save" and this will take you back to the CLA case page. Mark in the CSS Score, the date of score, and mark as "Complete" in the "Activity Status".

You might have to create a support case for this person. That's alright! See Step 4. Life After the Call.

New Contact: Did Not Reach Them

This could be because you were sent on a run-around, they weren't available, or you received their voicemail. We do not *need* to leave messages, but again, this is up to your discretion.

- ❏ In the "Comments" section, make a note that you were unable to get ahold of them and who you were calling for originally.
- ❏ Mark this call as complete under "Status".
- ❏ Hit "Save" and this will take you to the CLA case page.
- ❏ Create a follow up task by hitting "New Task".
- ❏ Follow steps found in Step 1. Preparing for the Call, Now You're Ready to Make a Call.
- ❏ Set a reminder for yourself. This can be set to a specific date and time. I like to add in the contact name so I can see who I'm calling when my reminders pop up.
- ❏ You can even add in the CL Satisfaction Notes on the CLA page anything you'd like to see on your Team Loyalty Screen.

Current Contact

So you've discovered SalesForce isn't always out of date! Now is the time to do a little celebratory jig! But only after you've determined if the contact was made or you didn't reach them.

Current Contact: Spoke with Them

Reminder: A task can only be marked as complete once you've collected the CSS! See Step 4. Life After the Call for instances when you might not collect a CSS and how to proceed.

- ❏ In the "Comments" section, add your copious notes, forwarding them with "Called to collect CSS".
- ❏ Change "Status" to Completed.
- ❏ Hit "Save" and this will take you back to the CLA case page. Mark in the CSS Score, the date of score, and mark as Complete.

As mentioned with New Contact: Spoke with Them, you might need to create a Support Case for this person. Again, see Eric for more details.

Current Contact: Did Not Reach Them

You will be following almost all of the same steps as "New Contact: Didn't Reach Them".

- ❏ In the "Comments" section, make a note you were unable to get ahold of them. If given any reasons, such as they were on vacation, they only are in on certain days, or don't come in until 10 am, it's important to include these in your notes for your future reference!
- ❏ Mark this call as complete under "Status".
- ❏ Hit "Save" and this will take you to the CLA case page.
- ❏ Create a follow up task by hitting "New Task".
- ❏ Follow steps found in Step 1. Preparing for the Call, Now You're Ready to Make a Call.
- ❏ Set a reminder for yourself. This can be set to a specific date and time. I like to add in the contact name so I can see who I'm calling when my reminders pop up.
- ❏ You can even add in the CL Satisfaction Notes anything you'd like to see on your Team Loyalty Screen.

A fun reminder: After you've called 6 times, if you still haven't reached your contact, you may mark the CLA case as complete. Just make sure you've added in "No Score" under "CL Satisfaction Score" and mark in the date of last call attempted.

Step 4. Life After the Call

So you survived making a call! Hurray! Sometimes there are instances when you really weren't able to obtain their CSS score. This varies on a case by case basis, so if you have any questions on what to do in this situation, speak with Eric.

There might also be a situation in which you've created a case for a contact you've spoken with. Maybe they were having on-going issues, maybe it was something bugging them and they weren't sure if we could fix it. Either way, better to create a case than be sorry! We should always offer our free remote training and ask if they have a moment to solve the issue right then, and offer to transfer them over to someone in support.

But in a situation where you've created a new support case for your contact, if you weren't able to collect that CSS during your call, the case should not be marked complete until the new support case is closed, sent back to you, and you've reached out again. So here are the steps of creating new cases.

Creating New Support Cases for Our Contacts

It's always better to ask questions, so if you run into any issues, speak with Eric.

- ❏ Go to the Contacts page.
- ❏ Go to Cases, and select "New Case"
- ❏ Make sure the correct Account Name is written in and the Contact Name is to the person you've talked with about their issue.
- ❏ In the subject, try to avoid saying "needs help" or "issue". Be as specific and concise as possible.
- ❏ Confirm best number and email to reach the contact at.
- ❏ The Description should be as detailed as possible. Add in any notes you took from the call
- ❏ If you need help selecting the correct Product Type, Case Reason, and Type, see Eric.
- ❏ Case Origin should be selected at "Customer Loyalty"
- ❏ Once everything looks good to go, hit save and your case has been created!

Once a Support Case Has Been Closed

Once a support case has been closed by the department it was sent to (or where ever it ends up going), Eric will be sending them back to us to follow up on. At this point, we can capture those CSS scores and see how everything ended up working out. You can make these callbacks a week later, but again, use your discretion.

- ❏ Log a call (See Step 1 and 2). This should be a new call and belongs in the CLA case.
- ❏ Ask them how it worked out, mention person they spoke with.
- ❏ Collect CSS score (if not collected before).
- ❏ Close out case by marking complete.

If you are unable to get ahold of them, you can leave a voice message at this point and mark the case as complete.If you weren't able to obtain the CSS, make sure you select "No Score" under "CL Satisfaction Score" and mark the date of your final attempted contact.

Hopefully the issue has been solved and everyone is happy! Especially you, because now you can move onto the next call!

Mission Statement:

Our mission is to drive satisfaction and earn brand advocates. By being proactive and reaching out to our clients, we build rapport by asking for feedback. We believe our most unhappy clients push our product and support to be the best. We want to remind our clients they signed on for exceptional software and support, not just functional.