

## GoldCRM's Service Management Solution – Features & Benefits

Service Component	GoldCRM Module(s)	Features	Benefits
<b>SLA Management</b>  <i>Handle Customer Service Requests</i>	Dispatch Advisor	<ul style="list-style-type: none"> <li>• SLA Entitlement</li> <li>• Supports complex SLAs, i.e. Duration based, Next Business Day, etc</li> <li>• Auto-calculates Service Commitments</li> <li>• System proposed appointments based on SLA Compliance</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase SLA Compliance</li> <li>✓ Increase Customer Satisfaction</li> <li>✓ Increase Revenues</li> <li>✓ Reduce SLA Non-Compliance</li> <li>✓ Penalties &amp; Concessions</li> </ul>
<b>Scheduling &amp; Dispatching</b>  <i>Schedule Service &amp; Assign Technician</i>	Dispatch Advisor	<ul style="list-style-type: none"> <li>• Templates auto-create tasks for delivery of requested service with option for auto-scheduling of tasks</li> <li>• Real-time scheduling engine</li> <li>• Considers SLA commitments, location, skills, certifications, schedules, customer preferences and trunk inventory</li> <li>• Supports ability to customize service delivery parameters based on customer needs at time of request for service</li> <li>• Supports group dispatching to virtual queues for first available Technician</li> <li>• Always assigns the right Technician at the right time</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Productivity &amp; Efficiency in the Call-center</li> <li>✓ Increase Calls per Day Capacity</li> <li>✓ Increase Quality of Service</li> <li>✓ Increase Customer Satisfaction &amp; Loyalty</li> <li>✓ Increase Skills-to-Task Matching</li> <li>✓ Increase Revenues</li> <li>✓ Reduce Time to Dispatch</li> <li>✓ Reduce Call Handling &amp; Support Staff</li> <li>✓ Reduce Travel, Travel Times and Operating Costs</li> <li>✓ Reduce Overall Cost of Service</li> </ul>
<b>Call Center Management</b>  <i>Monitor &amp; Manage Service Calls</i>	Dispatch Advisor	<ul style="list-style-type: none"> <li>• Graphical tools for monitoring open services calls</li> <li>• Graphical tool for insight to Technician schedules with drag-and-drop capabilities</li> <li>• Outlook schedule integration</li> <li>• Provides Route Optimization functionality</li> <li>• Automatic, proactive notification of Jobs At Risk</li> <li>• Allows for easy viewing and updating of call activity</li> <li>• Facilitates "Dispatch It &amp; Forget It" workflow</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Productivity &amp; Efficiency in the Call-center</li> <li>✓ Increase Calls per Day Capacity</li> <li>✓ Increase Quality of Service</li> <li>✓ Increase Customer Satisfaction &amp; Loyalty</li> <li>✓ Eliminate Schedule Conflicts</li> <li>✓ Reduce Number of Re-schedules</li> <li>✓ Reduce Call Handling &amp; Support Staff</li> </ul>
<b>Service Management</b>  <i>Deliver Service</i>	Wireless Advisor	<ul style="list-style-type: none"> <li>• Instantaneous, real-time communication between Call Center &amp; Field</li> <li>• Real-time access to Service and Customer data</li> <li>• Displays turn-by-turn driving directions</li> <li>• Provides access for entering time &amp; expenses, logging parts used, changing status, logging notes</li> <li>• Enables Technicians to create parts orders and follow-up service requests</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Productivity &amp; Efficiency in the Field</li> <li>✓ Increase Service Response Times</li> <li>✓ Increase First-Time Fix rates</li> <li>✓ Increase Service Calls per day</li> <li>✓ Increase Revenue</li> <li>✓ Increase Quality of Service</li> <li>✓ Increase Customer Satisfaction</li> <li>✓ Increase Accuracy of Service related data</li> <li>✓ Reduce Number of Calls to Call Center</li> <li>✓ Reduce Service Resolution Times</li> <li>✓ Reduce Travel, Travel Times and Operating Costs</li> </ul>
	Field Advisor	<ul style="list-style-type: none"> <li>• Real-time access to Service and Customer data</li> <li>• Displays turn-by-turn driving directions</li> <li>• Provides access for entering time &amp; expenses, logging parts used, changing status, logging notes</li> <li>• Enables Technicians to create parts orders and follow-up service requests</li> </ul>	

## GoldCRM's Service Management Solution – Features & Benefits, contd.

Service Component	GoldCRM Solution(s)	Features	Benefits
<b>Inventory &amp; Logistics</b>  <i>Track &amp; Manage Inventory</i>	<b>Wireless Advisor</b>  <b>Field Advisor</b>	<ul style="list-style-type: none"> <li>• Trunk Stock Inventory management &amp; auto-replenishment</li> <li>• Enables Technicians to log parts used and/or exchanged - serialized &amp; non-serialized</li> <li>• Provides access for updating customer site configurations</li> <li>• Enables Technicians to create part requests, part orders and part returns</li> <li>• Tracks tools &amp; equipment assigned to Technicians</li> <li>• Reverse Logistics functionality</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Insight to Inventory</li> <li>✓ Increase Accuracy of Forecasting Inventory Needs</li> <li>✓ Increase Productivity &amp; Efficiency in the Field</li> <li>✓ Increase Accuracy of Customer Site Data</li> <li>✓ Increase Accuracy of Inventory Levels</li> <li>✓ Reduce Inventory Stocking Levels &amp; Carrying Costs</li> <li>✓ Reduce Inventory Shrinkage</li> <li>✓ Reduce Tools &amp; Equipment Losses</li> <li>✓ Reduce Shipping Costs</li> <li>✓ Reduce Overall Cost of Service</li> </ul>
<b>Process Management</b>  <i>Update &amp; Close Service Calls</i>	<b>Wireless Advisor</b>  <b>Field Advisor</b>	<ul style="list-style-type: none"> <li>• Real-time access to Service data</li> <li>• Enables Technicians to log time, expenses and parts</li> <li>• Enables Technicians to close service requests</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Productivity &amp; Efficiency in the Field</li> <li>✓ Increase Data Accuracy – Service &amp; Billing</li> <li>✓ Increase Accuracy of Time to Repair data</li> <li>✓ Reduce Number of Calls to Call Center</li> <li>✓ Reduce Time to Close Service Calls</li> <li>✓ Reduce Time Between Closing Call and Billing the Customer</li> </ul>
<b>Contract &amp; Service Billing</b>  <i>Invoice Customer</i>	<b>Billing Advisor</b>	<ul style="list-style-type: none"> <li>• Relates Services, T&amp;M and Billing to Contracts</li> <li>• Creates Invoices &amp; Payables for Time, Expenses, Parts &amp; Contract Charges</li> <li>• Supports Consolidated Invoicing</li> <li>• Integrates with any Financial System</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Accuracy of Invoices</li> <li>✓ Increase Customer Satisfaction</li> <li>✓ Increase Collection Times</li> <li>✓ Increase Service Revenue</li> <li>✓ Reduce Customer Disputes and Payment Delays</li> <li>✓ Reduce Improper or Lost T&amp;M Billing Data</li> </ul>
<b>Analysis &amp; Reporting</b>  <i>Generate Reports &amp; Analyze Data</i>	<b>Analysis &amp; Reporting Advisor</b>	<ul style="list-style-type: none"> <li>• Seamlessly integrated with ClarifyCRM</li> <li>• Enables creation of complex queries with point and click interface</li> <li>• Reports on any table or view in the Clarify database</li> <li>• Reports from live database or offline data mart</li> <li>• Supports local data caching</li> <li>• Data views include graph, cross-tab, data, form and map</li> <li>• Supports drill-down, filtering and sorting</li> <li>• Ability to save reports as Excel, pdf or HTML files</li> <li>• Automatic report distribution capabilities</li> <li>• Web reporting portal for distribution via internet</li> </ul>	<ul style="list-style-type: none"> <li>✓ Increase Ability for Business &amp; Performance Analysis</li> <li>✓ Increase Value of Data</li> <li>✓ Increase Productivity &amp; Efficiency of Reporting Staff</li> <li>✓ Increase Ability to Optimize Service Delivery based on Performance Analysis</li> <li>✓ Reduce Reporting Turn-Around Time</li> <li>✓ Reduce Reporting &amp; Distribution Costs</li> <li>✓ Reduce Reporting Staff</li> </ul>