Basic Telephone Instructions

# Answering the Phone

# “Good morning/afternoon Thank You for Calling TrialWorks, this is \_\_\_\_\_. How may I help you?”

# After the caller starts talking make sure you ask, “Who’s calling please?”

# Find out the person’s name and the firm they are calling from. Verify we have their email address.

# ALL phone calls from customers require a Support ticket created in SysAid. Even if you do not end up helping with the issue and they have to be called back, note the issue they called about.

# Tech or Training calls

Determine if the call is for assistance using the program or whether the caller is having a problem that has caused an error in the program. A call on how to use a feature in the program goes to the Training Department. An error in the program goes to the Tech Department.

# Go to TrialWorks - TWCustomers

# Search the firm name. If you cannot find the firm’s name, use Case search and search for their phone number.

# Verify Maintenance is up to date. (Expired Maintenance will pop up and will be written in Firm Info tab.)

# **If Maintenance is up to date** – find out issue and assist. If you cannot fix the issue, find out the details, place the person on hold, and ask for help. Chances are if you give the details to another Tech representative, they will be able to tell you how to handle the issue.

# **Maintenance up to date but all tech support personnel are busy on other calls** – politely tell the customer that you are very sorry, but you must have a tech person call them back. Create an SysAid support ticket with all the details.

# **Maintenance Expired** - place person on hold, have Lisa or Griselda verify that maintenance is actually expired. If Maintenance is expired, inform the caller that we cannot provide support due to the Expiration of their maintenance. If they are one of the contact people on the account (TrialWorks Admin, Billing or Main Contact), you can tell them to renew their maintenance immediately, all they have to do is fill out the credit card portion of the estimate, sign the estimate, and fax it or email. You can find in the notes when the last time Lisa mailed or faxed a renewal notice. If they need another estimate, please forward the caller to Lisa and she will send it over. If the caller is not the contact person on the account, just explain that maintenance has expired, and we can have billing send an estimate.

# Calls for specific employees

# First find out if the call is Tech or Training related (sometimes customers don’t know to ask for tech support, they just keep asking for one specific person). Every Tech person should be able to assist a customer, or at least attempt to. Try and assist the customer so that calls don’t have to be returned by offering another tech. Using Microsoft Teams send an Message to the recipient. They will usually respond quickly and tell you what to do.

Calls from customers to schedule training

Griselda and the trainers handle all scheduling for the training department. Ask the caller to hold, announce the call the Training Group and forward the call to their extension (currently “2”).

Sales calls from potential customers

Tracee Wagner handles all sales calls. In her absence, advise the caller that she is currently unavailable and ask if they would like to leave a voicemail for her. Transfer the call to Tracee’s extension (currently “240”).

Sales calls from current customers

Tracee Wagner handles all sales calls. In her absence, advise the caller that she is currently unavailable and ask if they would like to leave a voicemail for her. Requests for information about moving to our Hosting environment, estimates for data conversion and customization are only given by Tracee. If she is unavailable, advise the caller that she will return the call as soon as possible.

# **Customers wanting to pay for licenses, maintenance, etc.**

# If the customer has an estimate and wants to pay via credit card, have them fill out the bottom portion of the estimate, sign, and email to Lisa or fax back to 305-357-6499. Both Lisa and Griselda can take calls for users that want to provide their credit card information over the phone.

What you should never do.

# Never be rude to a caller, especially a customer. If you feel uncomfortable with where the conversation is going, please ask someone for assistance. If a customer is upset with our company, please pass the call immediately to Patrice.

# Never be afraid to ask for help. We all try to help each other. If you need help, ask around. No question is a dumb question (especially while we are learning)!

**Department Employees:**

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| --- | --- |
| **Admin**   * Ryan Pakter   **Billing/Finance**   * Don O’Leary * Lisa DeMahy * Griselda Tay   **Marketplace**   * Giorgio Carrido * Marta Jauma   **Programming/Product Development**   * Robb Steinberg * Jeanny Collazo * Luis Rodriguez * Ernesto Vargas * Seth Gram * Pedro Ventura * Suganthi Sellamuthu * Travis Laurence   **Sales**   * Tracee Wagner * Monica Myslinski * Melissa Baker * David Martignetti * Troy Hall | **Hosting**   * Robert Cott * David Garcia * Sam Van Dalen   **Techsupport**   * Nim Hirschhorn   **Level** 1   * Alex Bazzi * Aaron Ball * Daniel Marquez * Kevin Reyes * Kirsten Kirby * Lindy Milan   **Level** **2**   * Andres Diaz * Tony Castellanos   **Level 3**   * Emmanuel Latorre   **Trainers**   * Diane Danois * Eric Hill * Janis Senger * Luana Terrasini * Liz Trincone * Vickie Wright |