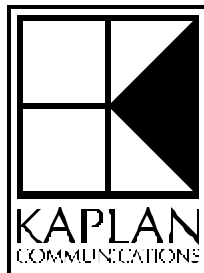# Web Form and Email
Tracking and Management

How GreyStone Power's
Customer Service Department
Uses Topaz Form Tracking

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GreyStone Power Corporation uses the Topaz Form Tracking Service to manage their customers' web based requests. This paper describes what Topaz Form Tracking does and how GreyStone Power uses it to provide faster response to customer requests, improve customer satisfaction, increase employee morale and lower customer service costs.

Summary

GreyStone Power's customer service department receives several hundred requests each day. Of these requests, approximately 150 arrive electronically via the GreyStone web sites. How did GreyStone encourage its customers to make requests electronically? By providing a multitude of web forms that address every likely request and by responding, on average, within one business day, GreyStone demonstrated to its customers the value of web-based requests. And, by providing service representatives with an easy to use tool for organizing, managing and responding to requests, GreyStone has created a true win-win situation. GreyStone saves money by staffing it's correspondence team – those representatives who handle electronic requests – based on average rather than peak loads. Customers are provided a more flexible and satisfying process for making requests. And customer service representatives have a system that requires less labor, causes less stress and provides more accuracy.

First there was Email

GreyStone's customers understand the power of email. At any time of day or night or on weekends or holidays GreyStone's customers can make requests related to a variety of services - from new service orders and PIN requests to installing temporary power poles to inquiries regarding fleet services and truck maintenance.

Many consumers prefer email over telephone-based assistance. Customers can send requests when it is convenient for them. There are no recorded messages to listen to, no phone menus to navigate or buttons to press, no waiting on hold. More and more, savvy consumers are turning to email and web forms for customer support.

Email is just as beneficial from GreyStone's perspective. Compared to phone calls, email requests can be handled faster, and cheaper, using fewer employees. With email, peak loads can easily be extended to off peak times. Consequently, personnel can be scheduled based on the average number of requests rather than peak number of requests. Email doesn't lose it's temper. Email is a "win-win" solution for consumers and businesses.

Then there were Web Forms

Email is useful but web forms are better. If you have ever purchased merchandise on-line or requested information via a web site where you typed your name and mailing address and other pertinent information, then you have used a web form. A web form tells GreyStone's customers exactly which pieces of information are required to complete their requests. Consumers understand that a web form gets directed to the person that

specializes in their type of request. Using a web form increases their chances of a satisfactory response and in a shorter amount of time.

Web forms also benefit the company that provides them. When customers fill in a web form they are performing the data entry for free - the company doesn't have to pay a Customer Service Representative (CSR) to type in the data during a phone conversation or while transcribing an email. The time and labor costs saved in this one step are substantial. Based on the web form's title, such as **New Service Request,** requests can be sorted and routed quickly to the proper employee. This speeds up the handling of requests, reduces the number of lost or mis-routed requests and increases customer satisfaction. The web form contents can be stored in a database where the data is organized, managed and evaluated.

Now There are Topaz Web Forms

Topaz web forms are different from standard web forms in two ways. First, most web forms are transmitted from the website back to the company via email. Email is not perfect - emails do occasionally get lost or delayed. To compound this problem, most web site visitors receive a "thank you" notice or confirmation immediately after submitting their form, even if the company has not yet received the data. But the visitor assumes their request has been received. If their email is lost or delayed and they don't hear from you, they will assume you have dropped the ball.

Topaz web forms are not transmitted back to GreyStone via email. Instead, they are inserted directly into the company's Topaz database. By the time the web visitor sees the "thank you" notice, their form has been safely stored in the database. Within seconds the data is displayed on the CSR's computer monitor. Topaz forms can never be lost or delayed.

Topaz web forms are different than standard web forms in their method of construction – a method which lowers costs dramatically for creating web forms. Most forms are created by a web designer using HTML. The process is tedious and time consuming. In 2002, when GreyStone Power implemented 23 forms, the task required a web developer several weeks. In 2008, when the forms were revised, the Topaz automated form generation was used to build them. All of GreyStone's 23 new forms were created in several hours.

With Topaz, GreyStone provides web forms that address every likely topic.

When a website visitor has a request, they should be encouraged to use a web form rather than regular email. To do that, GreyStone provides a variety of web forms that address every likely topic. If a form exists for the topic in which the visitor is interested, then they are more likely to use a web form rather than email. GreyStone offers nearly 30 different forms for its visitors. Consequently, less than 5 percent of electronic requests arrive via regular email; the remainder arrive via web forms. With the Topaz method of web form

construction, any company can blanket it's website with a wide range of web forms at a reasonable cost.

Topaz collects and organizes both web forms and email.

Topaz provides a web-enabled application that collects and organizes requests that originate from other sources besides the GreyStone Power website. Topaz collects all emails that are addressed to memberservices@greystonepower.com. Topaz gathers internal messages from other GreyStone employees. Topaz also collects emails generated by some of GreyStone's vendors such as their after-hours phone service company and the vendor that processes online payments. So, with Topaz, CSRs see all the requests and messages, from a variety of sources, that are addressed to them. The CSR can use one tool, Topaz, to process every electronic request.

Topaz has several features that assist the CSR in processing requests. After the CSR logs into Topaz, they see a list of new and pending requests. The CSR can adjust this page to update the displayed information as often as every minute so, throughout the day, the representative always sees an up-to-the-minute list of requests..

While Topaz can automatically route requests, GreyStone uses the service a little differently. GreyStone has all the requests come to a single CSR, the designated "gatekeeper". The gatekeeper reviews the list of incoming requests and, based on request category, workload and other factors, assigns requests to CSRs. The assignment causes the pending requests to appear on each CSR's screen.

Customized Email Templates

A service representative's most common task is to send email responses back to the person who made the request. To make this job easier, Topaz contains customized email templates that cover a wide range of responses. For example, one email informs new customers about their new account and their initial deposit requirements. By clicking a button, the CSR can generate an email that includes the customer's name, service address and other pertinent information. The email can be edited if neccesary but most of the time the CSR just uses two clicks – one to create the custom email and then, after reviewing the contents, a second click to send it on its way. This feature is a favorite of the GreyStone CSRs and a real morale booster.

Another benefit of generated email is improved accuracy. With the old method of copying and pasting text, the possibility existed that the content intended for one customer could be pasted into an email that contained the address of another. With generated email that can not happen.

A CSR may edit a form to add new or updated information, may add notes or comments and can mark a request 'Completed' or 'Cancelled'. The Topaz audit function keeps track of every action by every CSR – what was changed, when it was changed and who changed it. Changes are highlighted so other CSRs can easily see what was done.

Since all the form data, as well as the CSRs' actions, are stored in a database, it is possible to provide a variety of reports for measurement and evaluation. For instance the Dashboard report shows the current, up-to-the-minute, number of New and Pending requests by Category and by CSR. Another report shows, for each month, the number of Created and Completed requests by Category and CSR. Data can be downloaded into Excel for additional analysis.

Since GreyStone collects identity data, it was important that security issues be addressed. The Topaz system uses the following features, among others, to provide data security.

The Topaz system is password protected and IP address protected. That is, CSRs can use Topaz only from designated computers.

Topaz uses SSL encryption to encode customer data as it is transmitted over the internet. In addition, sensitive customer information, such as SSN numbers, are encrypted in the Topaz database. Very few vendors store identity data in an encrypted format. If someone did get access to the database the sensitive data would be undecipherable.

In addition to these features it is possible to have Topaz remove sensitive, identity related information from the database after a request is completed. The non sensitive data remains, so reporting and analysis can be performed. This process removes any risk related to the exposure of sensitive customer data. If sensitive data doesn't exist it can't be compromised.

In addition to the standard features described above, optional features can include:
• Online payment of deposits via checking account, credit card or PayPal
• Automatic retrieval of customer data from external systems to display customer history
• Automatic transfer of form data to external systems to avoid extra data entry

For questions about Topaz Form Tracking please contact:

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