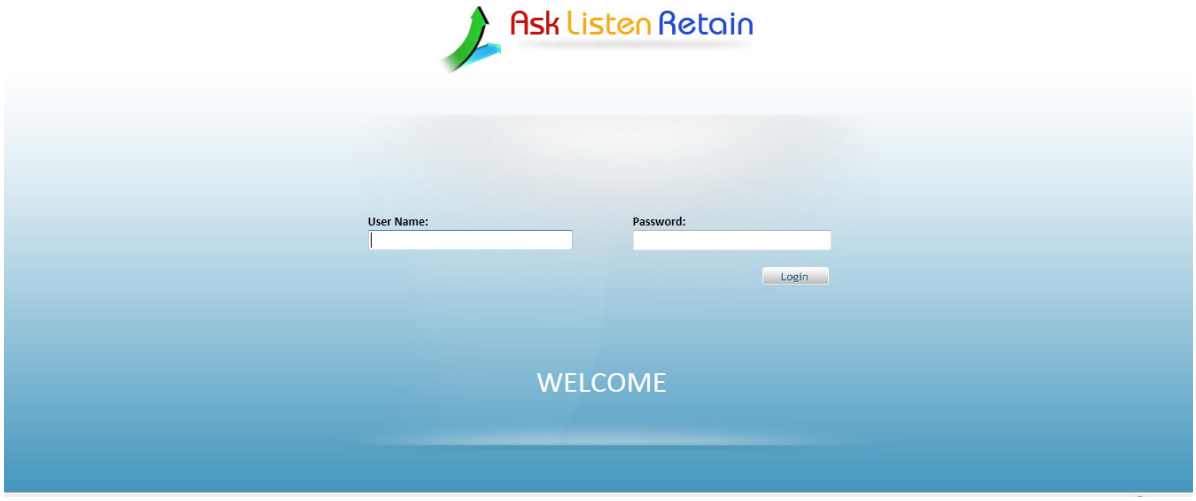
The

ASK LISTEN RETAIN



User's Guide

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MARKET RESEARCH

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Introduction:

The ASK LISTEN RETAIN User's Guide

Welcome to the ASK LISTEN RETAIN user's guide. This manual will tell you everything you need to know about how to use ALR, how to effectively participate in the ALR customer-satisfaction & retention program, and how to get the most out of the software features.

What is ASK LISTEN RETAIN (ALR)?

ASK LISTEN RETAIN is a Web-based system for analyzing customer-satisfaction surveys, identifying customer concerns/issues based on those surveys, responding effectively to those problems, tracking and recording the progress of those responses, and ultimately resolving customer problems in this closed loop system.

We 'ASK' Your Customers Survey Questions...

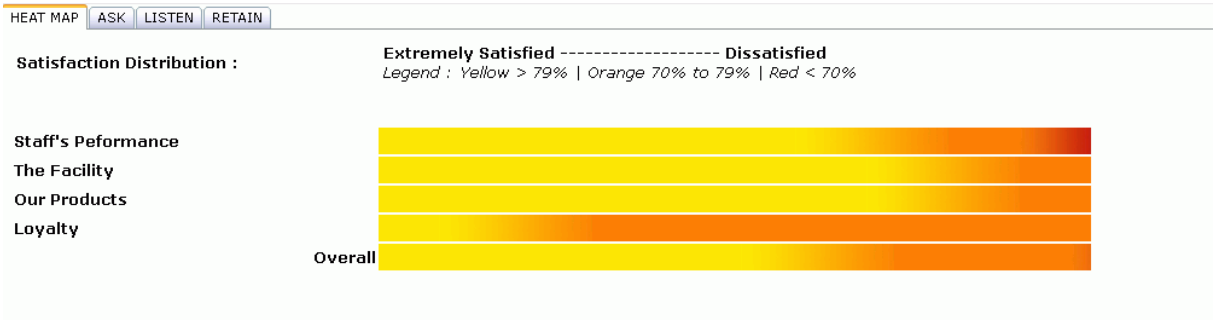
In the ALR system, the process begins with customer-satisfaction surveys in any of the following of formats:

- Telephone surveys designed jointly by representatives of your company along with an expert survey-design team from Compechek, and conducted by Compechek's highly-experienced professional survey interviewers.
  See: http://asklistenretain.com/telephone-customer-satisfaction-surveys/ for more information.
- Online surveys, with distinctive design and customized questions, reaching customers through a variety of media, and providing answers that can be quickly and automatically processed.
  See: http://asklistenretain.com/online-and-mobile-surveys/ for more information.
- Mobile surveys, which can run in conjunction with online surveys, reaching customers whom online surveys might miss, and drawing a response 'in-the-moment'; even while customers are still at the place of business.
  See: http://asklistenretain.com/online-and-mobile-surveys/ for more information.
- Email surveys, which allow you to reach out directly to your customers and prompt a response with customized email survey forms designed to pass spam filters, providing data that can be processed along with online and mobile responses.
  See: http://asklistenretain.com/email-surveys/ for more information.

You company can choose to use one or more of these formats, in any combination. The ALR system offers a wide variety of options for survey design (http://asklistenretain.com/survey-themes/), question types (http://asklistenretain.com/survey-question-types/), and reporting (http://asklistenretain.com/survey-reporting/).

...You 'LISTEN' and Analyze the Results...

The ALR system analyzes the survey responses to produce customer-satisfaction scores for each of your company's locations, broken down by major areas of interest. It displays these scores both numerically (as percentages) and in the form of an interactive "heat map," which graphically shows degrees of customer satisfaction and dissatisfaction for each major area of interest.



"Heat Map" Interactive Chart

...and you 'RETAIN' Customers by Responding to Alerts About Potential Problems.

The ALR system goes far beyond simply showing you how your customers feel about your services and products. It will automatically issue alerts when the system determines that a customer's response to the survey requires attention for any of the following reasons:

- A low customer-satisfaction score
- Negative words were found in the customer's comments
- A specific answer given to a question. For example, if the customer answers 'No' to the question, "Would you recommend us to your family, friends or colleagues?"
- The survey interviewer suspects an unspoken problem based on his or her professional experience.

When the system issues an alert, ALR sends an e-mail notification to the store manager affected by the problem. ALR tracks responses to alerts; if the store manager who was notified has not viewed the full description of the alert within a certain time-period, or has not closed an alert within a certain time period, he or she (along with higher-up managers) will receive a reminder notice that the alert is overdue. The ALR system also provides store managers with the appropriate e-mail templates for responding to customer concerns, and it tracks the problem's resolution. It records all notifications, responses, management comments, and changes in alert status in a diary for that alert to show how the customer's concerns were brought to resolution, for future reference.

In summary, the ALR system is designed to make it easy to respond to customer concerns and problems, and to ensure that no concerns go unanswered, and no problems go unresolved. It is here to support you in your job, and to make your company more profitable by ensuring you have happy, loyal customers.

Overview:

Getting Started with ASK LISTEN RETAIN

Welcome to ASK LISTEN RETAIN -- your online center for tracking customer satisfaction and building customer loyalty!

In this section of the ASK LISTEN RETAIN manual, you'll get an overview of how the ALR system works, what its key features are, and where to find them. Later sections of the manual will show you in detail how to use these features, and how to get the most out of the ALR system.

But for now, let's start with the basics...

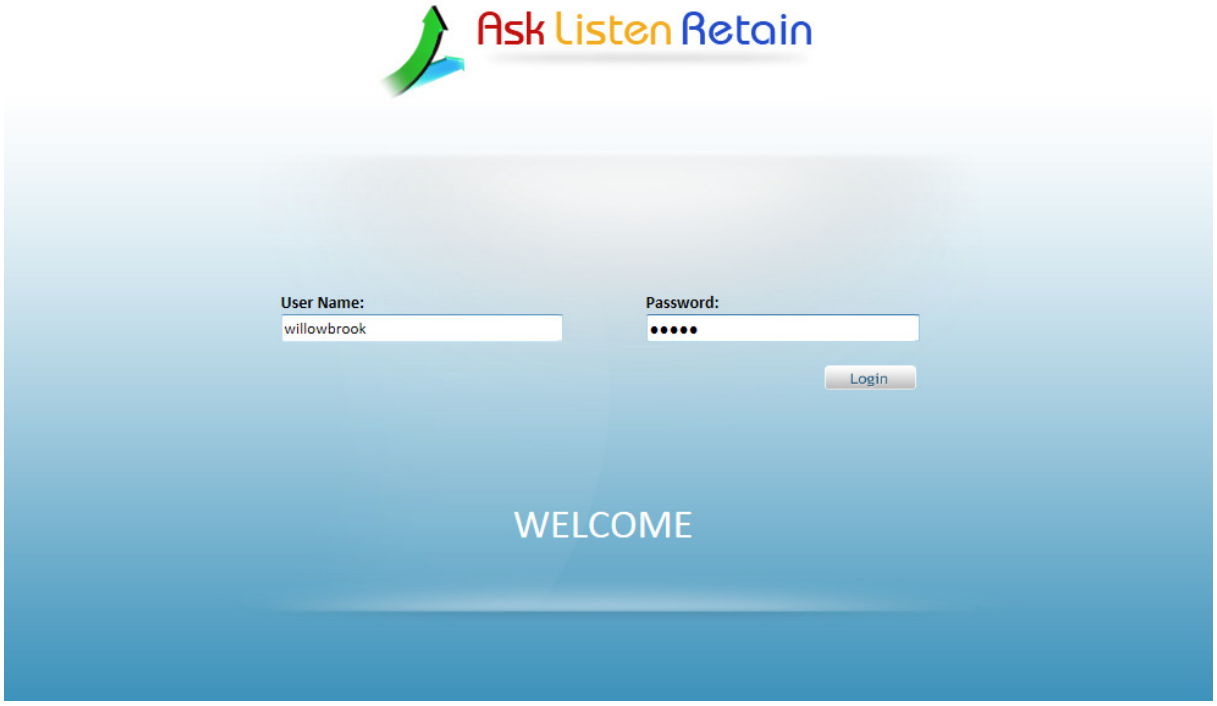
Logging on to ASK LISTEN RETAIN

Note: You *must* have a user name and password for access to the system. User names and passwords are assigned by system administrators. If you do not have a user name and password, please contact your supervisor or other management personnel in charge of administering the ALR system for your company.

You can use any standard web browser for access to the ASK LISTEN RETAIN system.

To sign in:

1. In your web browser, enter http://www.compechekmarketresearch.com/Login.aspx in the URL window and press Enter. You will see the ALR Log In page.



The Login Page

Suggestion: You may want to create a Favorites link/bookmark for the ALR Log In page in your browser.

2. Enter your user name and password, then click on the Log In button.
3. You will see the survey list page (the main screen) for your company.

Change Your Password

If this is the first time that you have logged into the ALR system, it is important for you to change your password from the one that was initially assigned to you.

To change your password:

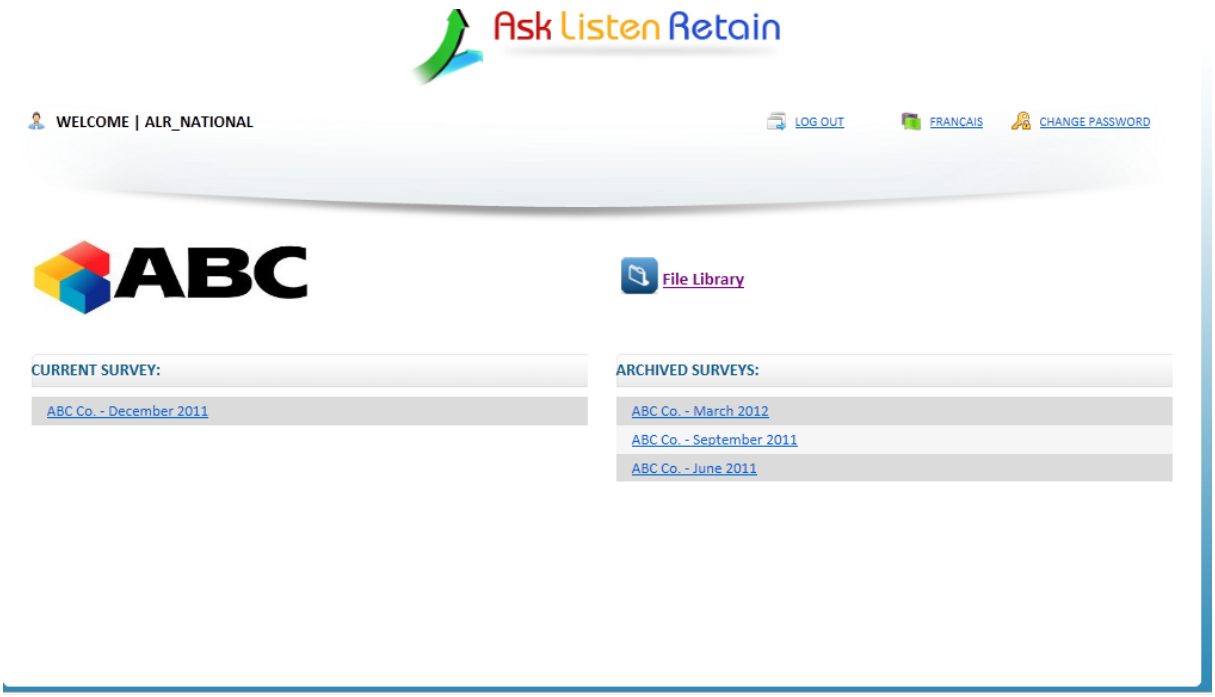
1. Click on the *Change Password* link in the upper right-hand part of the page. This will bring up the Change Password window.
2. Enter your old password (the one initially assigned to you).
3. Enter the new password that you have chosen in the *New password* field.
4. Enter the new password again in the *Confirm new password* field.
5. Click on the *Change* button.

Survey List Page

This page gives you links to surveys which Compechek Market Research has done for your company.

Survey Links

The link to the most recent survey is on the left, under the "Current Survey" heading. Earlier surveys are listed on the right, under "Archived Surveys."



When you click on a survey link, you will see the Executive Summary page for that survey.

Executive Summary Page

The Executive Summary page is like a central command post for each survey. It gives you everything you need to know about the survey, and everything you need in order to take action, in a simple, well-organized manner.

Executive Summary

Near the top of the page on the right-hand side, in the section labeled "Executive Summary," you'll see a percentage. That's the level of overall customer satisfaction, based on the survey. Listed below that number are the survey's subcategories; these will vary, depending on your company's products, services, and concerns. For each subcategory, you will see a percentage representing customer satisfaction for that subcategory.

If you click on the Executive Summary percentage you will see a Survey Questions page listing all of the questions in the survey, along with customer information and each customer's RAW answers (the original answers before they are statistically converted into the Executive Summary percentage). If you click on each of the subcategory names below the Executive Summary, you will see a similar Survey Questions page with the questions and raw answers represented by that subcategory's percentage. All of these Survey Question pages can be exported to Excel format for use in your company's in-house reports.

Percentages are color-coded: Yellow highlighting indicates a high level of satisfaction (greater than 79%), no highlighting represents a lower level of satisfaction (70% to 79%), and red highlighting means serious dissatisfaction (below 70%).

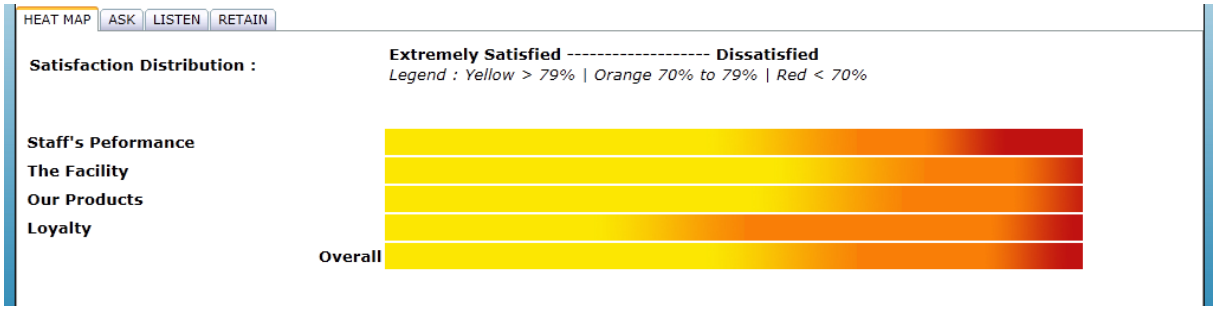
To compare the results of the current survey with the results of the previous survey, click on "Show Previous." The program will display the customer satisfaction percentages for the previous survey, allowing you to compare them with the current figures.

The lower half of the Executive Summary page has four tabs: Heat Map, Ask, Listen, and Retain. These tabs allow you to see detailed information about the survey, and to make the appropriate response. Click on a tab to view its contents; the tab that is currently on display will be shown in white, with an orange bar across the top of the tab.

HEAT MAP Tab

When you first arrive at the Executive Summary page, you will see the Heat Map Tab. It shows the range of customer satisfaction/dissatisfaction as a horizontal bar graph, with a bar for each

subcategory, and one for overall satisfaction. It is called a "heat map" because it shows areas of the survey with high levels of dissatisfaction as "hot" areas which need immediate attention.



Heat Map

On each bar, satisfaction and dissatisfaction are shown by the colors of the bar, very much like the highlighting for the Executive Summary results, but with colors designed to represent relative shades of "heat." Yellow indicates a high level of satisfaction (greater than 79%), orange represents a lower level of satisfaction (70% to 79%), and red means serious dissatisfaction (below 70%).

If a bar is mostly yellow, with only a bit of orange and red at the far right, then the majority of the customers surveyed are satisfied. If it is mostly red, with only a little yellow and orange at the far left, then almost all of them are very dissatisfied. If you see a broad band of yellow, a medium-sized band of orange, and a smaller band of red, then most of your customers are extremely satisfied, a moderate number are less satisfied, and a smaller (but still significant) number are very dissatisfied.

When you click on a bar in the Heat Map, you will see a Summary Report page for the survey subcategory represented by that bar. The Summary Report shows each customer's satisfaction score for the subcategory, colour-coded like the Executive Summary scores.

RESULTS - National Detailed Summary by Store:

Store	District	Region	Overall	Staff's Peformance	The Facility	Our Products	Loyalty
Class 1: Gold Level Status (Above 79%)							
Chilliwack	District 2	West	95 %	100 %	94 %	85 %	100 %
Guildford	District 4	East	94 %	92 %	94 %	98 %	93 %
Abbotsford	District 3	Mid	91 %	92 %	96 %	94 %	81 %
Richmond	District 2	West	89 %	89 %	93 %	94 %	78 %
Langley	District 2	East	84 %	85 %	91 %	80 %	78 %
Delta	District 1	East	82 %	74 %	80 %	96 %	78 %
Class 2: Silver Level Status (70% - 79%)							
East Van	District 4	East	78 %	77 %	82 %	80 %	74 %
Class 3: Bronze Level Status (Below 70%)							
Willowbrook	District 2	Mid	66 %	43 %	71 %	70 %	80 %
Hope	District 1	West	59 %	38 %	71 %	66 %	59 %

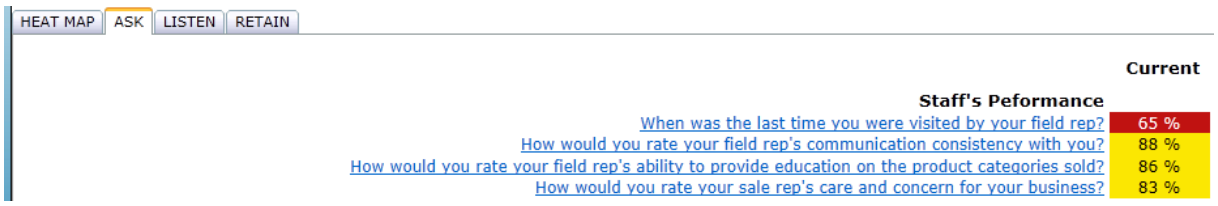
Store-level Summary Report

The level of detail in the Summary Report depend on your status, or role, in the ALR system. Store Managers see survey results for the individual customers served by their store who were included in the survey. District Managers will see the results for the stores assigned to them, from highest to lowest, and Regional Managers will see the results for the districts assigned to them, in high-to-low order, as well as for the stores in those districts (but not down to the customer level). In a similar

manner, National Managers will see regions and districts in high-to-low order, along with individual stores.

ASK Tab

The ASK tab is like an expansion of the Executive Summary; shows the results of each survey question, organized by subcategory.

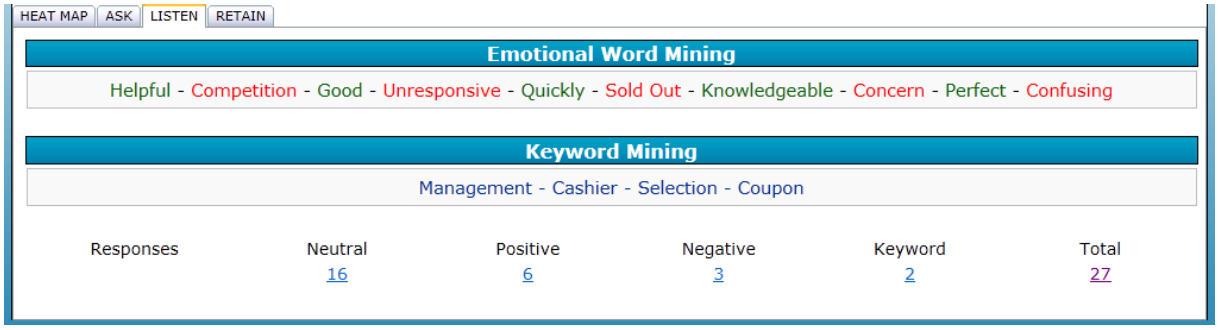


Ask Tab

You can see the satisfaction percentage for each question, with the same color-coded highlighting as the Executive Summary percentages. If you click on Show Previous, you will see the percentages for the previous survey. If you click on a question, you can see a breakdown of the individual ratings from each customer in the survey.

LISTEN Tab

The Listen tab shows a list of emotional words from the survey, with positive/negative color coding, along with a list of keywords, and the number of responses broken down according to whether they were neutral, or contained positive words, negative words, or keywords.



Listen Tab

If you click on a response figure, you will see a page showing the actual text of each response, with the appropriate words highlighted.

The highlighted words are keywords, taken from a customized list of words selected by your company, either because they indicate strong negative or positive emotions, or because they represent specific areas of interest (such as sales promotions, advertising campaigns, or new products or services).

RETAIN Tab

The Retain tab shows the number of alerts, broken down by category and stage of response. Alerts are customer responses requiring immediate attention and response. The categories indicate the general condition which prompted the alert (such as negative keywords in a comment), and the stages of response indicate whether the alerts are overdue for a response, are in progress, or are closed.

HEAT MAP | ASK | LISTEN | RETAIN

Alert Type:	New:	In Progress:	Overdue:	Closed:	Total:
An answer given to a question triggered this alert	0	0	3	5	8
A resulting score % for the survey was below the admin limit	0	0	0	1	1
There were negative keywords found in the comment	0	0	1	1	2
The interviewer created this alert	0	0	1	2	3
	0	0	5	9	14
	0.0 %	0.0 %	35.7 %	64.3 %	100.0 %

Retain Tab

If you click on the alert figure for a category and stage of response, you will see a page listing each alert in that category, with links to the details of the individual alerts.

Note: Common Links

Most pages of the ASK LISTEN RETAIN system include some or all of the following links:

Link	Description
Log Out	Exit the ASK LISTEN RETAIN system and log out of your account. Whenever you exit the system, be sure to log out if you are on a computer to which other people have access.
Français/English	Switch between French and English.
Change Password	Change your password. See the note on this page about changing your password.
File Library	The administrator for your company's ALR system can upload files here for distribution to everyone who has an account in the ALR system. You will see a list of files, and a download link for each file. If you do not see any files listed, it means that none have been uploaded.

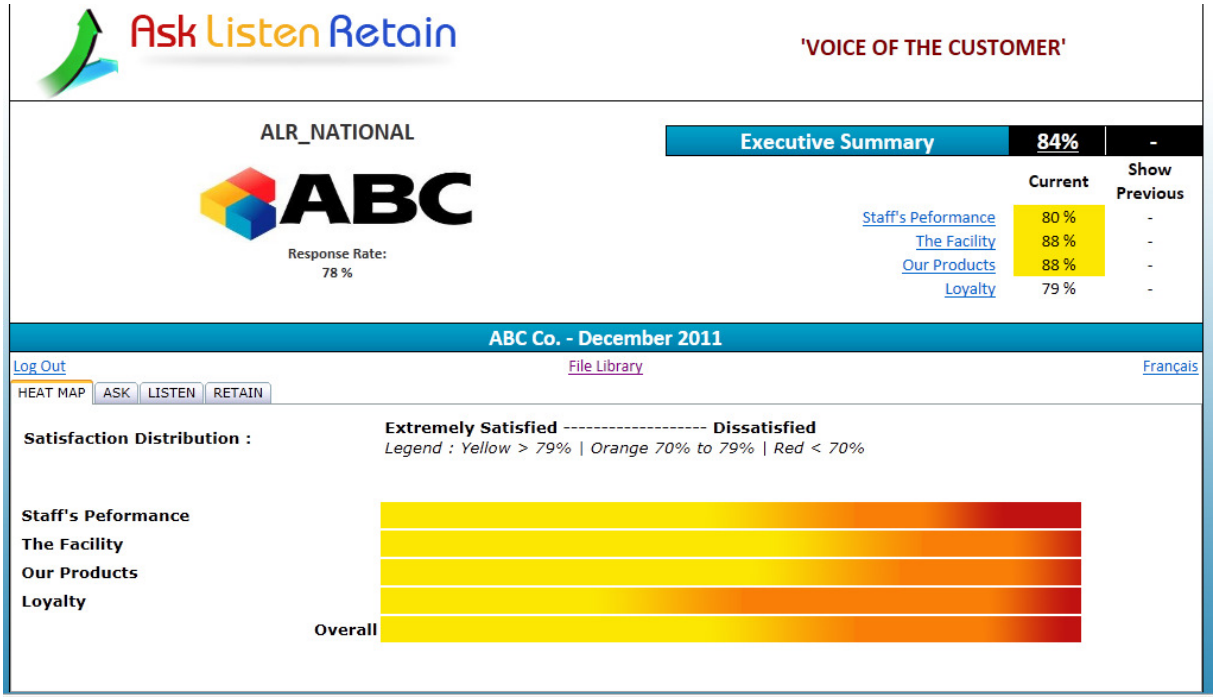
Chapter 1:

Executive Summary and HEAT MAP

Just as the name suggests, the Executive Summary page displays a summary of the latest survey figures as they apply to the stores for which you are responsible. The summary includes the response rate (the overall percentage of customers responding to the survey questions when asked), the overall satisfaction score, and the scores for each of the survey question categories. When you first enter the Executive Summary page, it also displays the HEAT MAP, which gives you a clear visual indication of which survey categories require the most immediate attention.

What you need to know about the Executive Summary page:

- It gives you the latest survey statistics for your stores.
- It gives you links to each customer's answer to each question, which lets you go straight to customer records and alert information.
- This is a quick way to zero in on problems.
- It provides access to HEAT MAP reporting, ranking the survey results for your customers, stores, districts and regions (depending on the management level of your account).



The Executive Summary Page and the HEAT MAP Tab

Note: The percentages and scores shown on the Executive Summary page (as well as the other pages in the ALR system) are for the stores which have been assigned to you in ALR by the system's administrators. These will typically be the stores which are your responsibility within your company.

So if you are a Store Manager, you will see the scores and survey information for your store. If you are a district or regional manager, you will usually be assigned the stores in your region or district. Higher-level executives may see the data for all stores in the system.

But as a general rule, if you see it, then at some point in your company's organizational structure, it's your responsibility.

The Executive Summary Score

The bar labeled Executive Summary (in the upper right-hand part of the page) gives you the overall customer-satisfaction score for your store(s). It is the average (mean) of the overall survey scores for each of your customers who was surveyed for the current survey as well as the previous survey for comparison purposes.

The Executive Summary Score

The scores themselves are calculated from the answers given to the survey questions. They represent degrees of satisfaction, given as percentages, with 100% representing complete satisfaction, and lower percentages indicating proportionately less satisfaction.

This means that if Customer # 1 gave your store an overall rating of 83%, customer # 2 gave it a total score of 75%, and Customer # 3 gave it a score of 63%, the overall score for your store would be (83 + 75 + 63)/3 = 73.667%, rounded up to 74%.

That's the number that will appear in your Executive Summary bar.

Survey Results Page

Clicking on that number brings up the Survey Results page, with raw survey data for your store. It includes a list of all of the survey questions (numbered for identification). Below the survey questions is a list of all of the customers from your store(s) who responded to the survey, along with their survey answers (keyed to the question ID numbers) and contact information.

Survey Questions

1 When was the last time you were visited by your field rep?
2 How would you rate your field rep's communication consistency with you?
3 How would you rate your field rep's ability to provide education on the product categories sold?
4 How would you rate your sale rep's care and concern for your business?
5 How would you rate the information and data support available to you?
6 How would you rate the level of technical support available to you?
7 How would you rate the marketing and promotional tools available to you?
8 How would you rate the consistency of lead times on deliveries?
9 How would you rate the fill rates provided to you?
10 How would you rate the overall QUALITY of the product as compared to the competition?
11 How would you rate the overall WARRANTY's offered as compared to the competition?
12 How would you rate the FILL RATES and TURNAROUND times as compared to the competition?
13 How would you rate the OVERALL VALUE (ie. service offerings) of product as compared to competition?
14 What % of your parts purchases are made from the competition?
15 Do you feel like you are treated as a valued customer?
16 Would you recommend us as a parts supplier?
17 Are there any unresolved concerns/issues from our last satisfaction survey?

Scroll horizontally to see full grid

Excel©

Region	District	Store#	-	Name	Customer	Phone	Email	Date	1	2	3	4	5	6
East	District 1	0137	1715	DALZIELS AUTO BODY	JOHN	9023683899	peter@compechek.com	7/3/2011	Last Month	7	7	5	7	7
East	District 1	0137	2505	FRIZZELS AUTO BODY	ANDREW	9023682892	peter@compechek.com	7/3/2011	Last Month	10	10	10	7	10
East	District 2	0369	1245	BRUNTS AUTOMOTIVE	JENNIFER	9024315158		7/3/2011	Last Week	7	10	7	7	10

The Survey Results Page

Just above the customer list, on the left-hand side of the page, is a button labeled Excel®. You can click on it to export the raw customer survey data to a Microsoft Excel file; it will include all of the information which you see in the customer survey raw answer list. The exported data is available for use in customized reports, or in your company's in-house reporting system.

When you click a name in the customer list, you will got to the Individual Survey Results page for that customer, which is the nerve center for customer response. The Individual Survey Results page is covered in depth in Chapter 5 of this manual.

Category Scores

Below the Executive Summary bar, you will see the customer-satisfaction scores for each major category of questions in the survey. Like the overall score, these scores represent the average for each customer surveyed for your store(s). The category scores are colour-coded for quick identification: gold highlighting is good (a score of 80% or more), silver (un-highlighted) shows less satisfaction (70% to 79%), and bronze (red highlighting) indicates serious problems (69% or lower).

Executive Summary	79%	65%
	Current	Previous
Salesrep Performance: ▲	92 %	77 %
Managers Performance: ▲	91 %	82 %
Services: ▲	69 %	61 %
Loyalty: ▲	62 %	39 %

Category Scores

Next to the category names, you will now see up- or down-arrows, indicating whether your store(s) have improved or fallen behind in customer satisfaction since the last survey.

And like the overall score, when you click on the name of a survey-question category, you will see the Survey Results page for that category, with numbered questions, raw survey data for each customer who responded, and links to their Individual Survey Results pages.

Note: If you see an X highlighted in red where a customer's raw survey data should be (as in the third example in the screenshot below), it means that the customer could not be reached (even after repeated attempts), or refused to participate in the survey, or did not reply.

Survey Questions

1 When was the last time you were visited by your field rep?
2 How would you rate your field rep's communication consistency with you?
3 How would you rate your field rep's ability to provide education on the product categories sold?
4 How would you rate your sale rep's care and concern for your business?

Region	District	Store #	-	Name	Customer	Phone	1	2	3	4
East	District 1	0137	1715	DALZIELS AUTO BODY	JOHN	9023683899	Last Month	7	7	5
East	District 1	0137	2505	FRIZZELS AUTO BODY	ANDREW	9023682892	Last Month	10	10	10
East	District 2	0369	1245	BRUNTS AUTOMOTIVE	JENNIFER	9024315158	Last Week	7	10	7
Mid	District 2	0410	1904	CITY BANK COLLISION	RON	9024686556	X			
Mid	District 3	0440		LORDCO AUTO - VEDDER		6048582200	Last Month	10	10	10
Mid	District 3	0440		LORDCO AUTO - YALE		6047921999	X			
East	District 4	0511	3377	BAY ROAD TIRE	DANNY	9028765586	Last Month	7	7	7

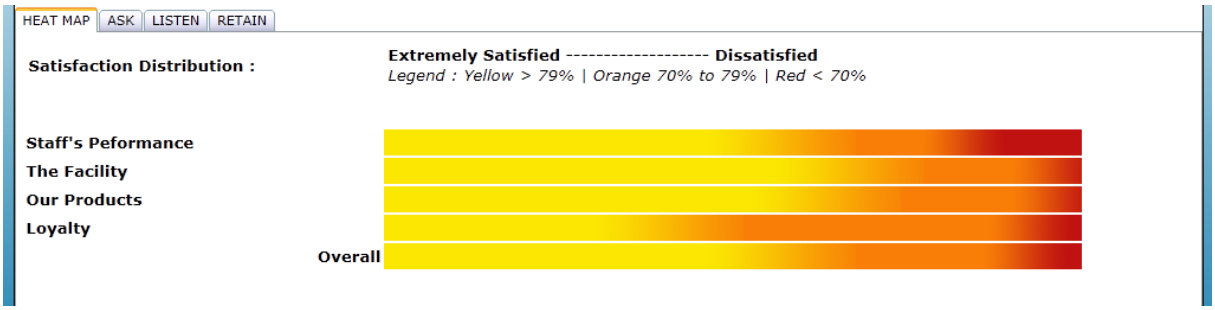
Category Survey Results

The HEAT MAP

Below the Executive Summary section, you will see four tabs: "HEAT MAP," "ASK," "LISTEN," and "RETAIN." The last three are covered in the following chapters. The HEAT MAP tab is described here, since it is so closely related to the Executive Summary itself.

The HEAT MAP uses colour-shaded "heat bars" to show the overall range of customer satisfaction/dissatisfaction for each survey-question category, as well as the overall survey. The colour-shading on the heat bars is like the colour-coded highlighting of the Executive Summary scores, except that the middle range is represented by orange, rather than white.

This allows the HEAT MAP to show satisfaction/dissatisfaction as a smooth gradation, from good (high levels of customer satisfaction) on the left, through orange (less satisfaction) in the middle, to red (serious dissatisfaction) on the right. The amount of the bar devoted to each colour indicates the number of customers expressing that level of satisfaction or dissatisfaction.



Heat Map

A bar that's mostly gold means that you have a lot of satisfied customers, and not many who are dissatisfied. A bar that's mostly red means that most of your customers are dissatisfied. A bar that's mostly orange, with only a bit of gold and a bit of red at either end means that while they aren't seriously dissatisfied, there is significantly more that you could do to make them happy.

Summary Reports

When you click on a bar, you'll see the Summary Report for that survey-question category. The Summary Report lists each customer's overall satisfaction score for that category, sorted by rank and colour-coded using the same system as the Executive Summary scores: gold (80% or above), silver (70% to 79%), and bronze (below 70%).

RESULTS - Summary by

-	Name	Customer	Phone	Overall	Staff's Peformance	The Facility	Our Products	Loyalty
Class 1: Gold Level Status (Above 79%)								
3809	QC AUTOMOTIVE	LARRY	9024547117	87 %	93 %	88 %	85 %	80 %
4420	K&B AUTO WORKS	DAVE	9024454426	87 %	73 %	94 %	78 %	100 %
5225	RCMP TIRE SERVICE	PAT	9024791556	81 %	80 %	88 %	85 %	68 %
Class 2: Silver Level Status (70% - 79%)								
3377	BAY ROAD TIRE	DANNY	9028765586	77 %	65 %	76 %	85 %	80 %
Class 3: Bronze Level Status (Below 70%)								
123	PETER'S AUTO	MARTY	5065463284	62 %	73 %	66 %	68 %	40 %

Overall Summary Report

Clicking on the Overall bar on the HEAT MAP (at the bottom), brings up the Summary Report for the survey, with each customer's score for each category and for the overall survey, all colour-coded, and ranked according to their overall scores.

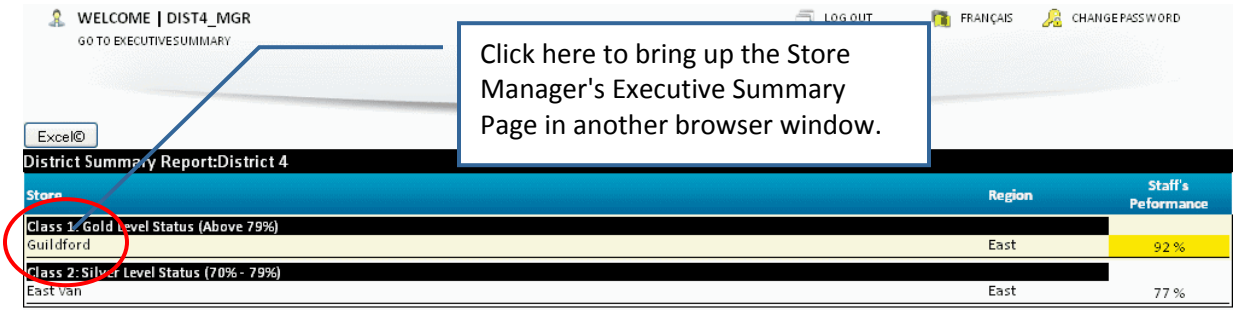
Higher-Level Management

If you have been assigned a higher-level management role (such as National or Regional Manager) in the ALR system, the information that you see on the Executive Summary page and in the HEAT MAP tab (and in the raw scores on the Survey Results pages) will be very similar to that seen by a Store Manager, but it will cover all of the stores, regions, or districts which you are responsible for.

Summary Reports

The most significant differences are in the Summary Reports. A Store Manager will see the basic set of Summary Reports, as described above. This is true even if the Store Manager has been assigned

more than one store; the reports will simply list customers for all stores assigned to that Store Manager, without separating them out by store. Higher-level managers, however, will see more than one level of Summary Reports.

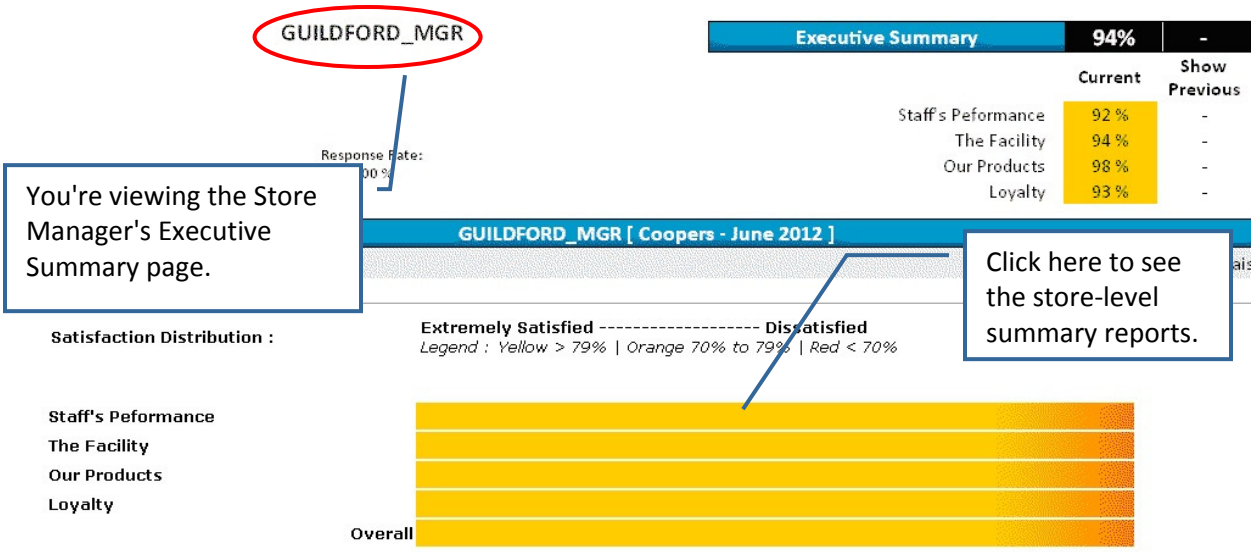


District Manager's Summary Report

A regional or district manager who had been assigned a set of stores in a district, for example, would see a District Summary Report showing the category or overall customer-satisfaction scores for each store in the district, ranked and colour-coded (Gold/Silver/Bronze).

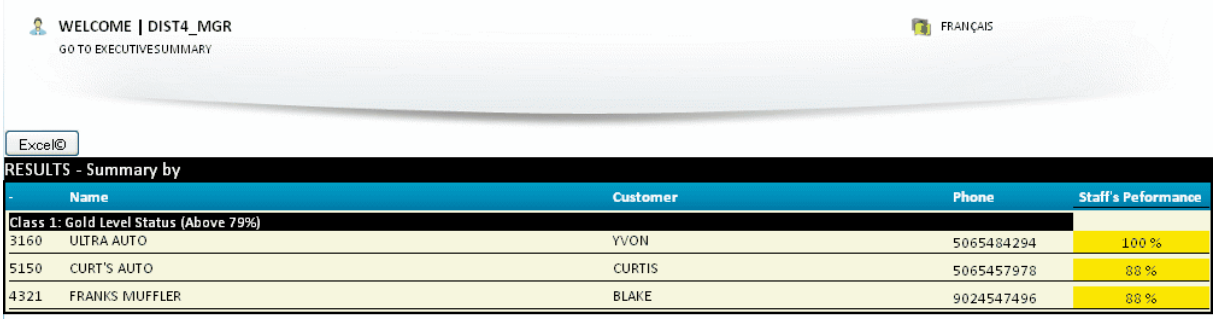
Viewing the Store Manager's Executive Summary

When you click on a store's name in the District Summary Report, the Executive Summary page of the Store Manager responsible for that store will open in another browser window.



District Manager's View of the Store Manager's Executive Summary Page

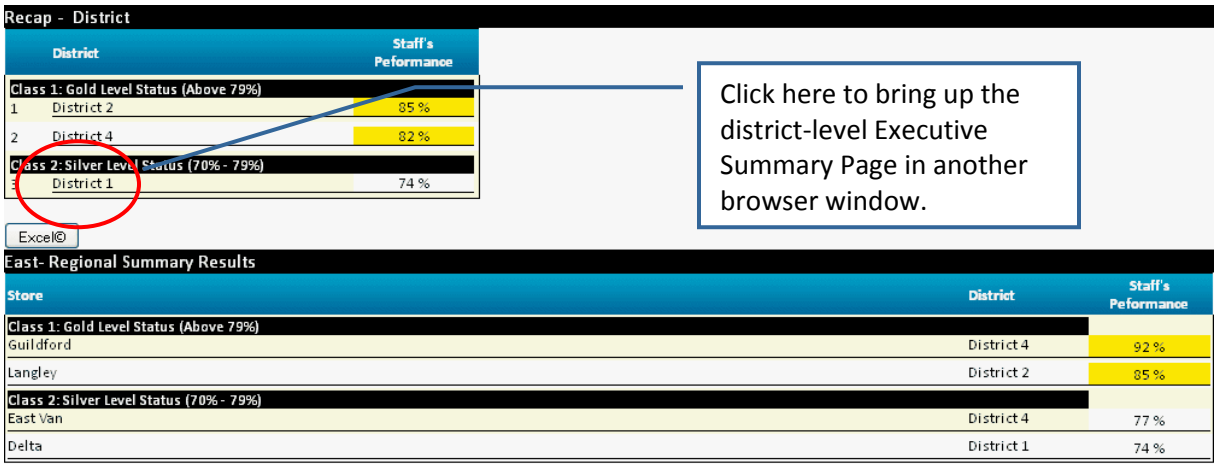
As long as you are in that browser window, you will see what that Store Manager sees on the ALR system. To view a store-level Summary Report, click on the appropriate HEAT MAP bar in the Store Manager's Executive Summary window.



The District Manager's View of the Store-Level Summary Report

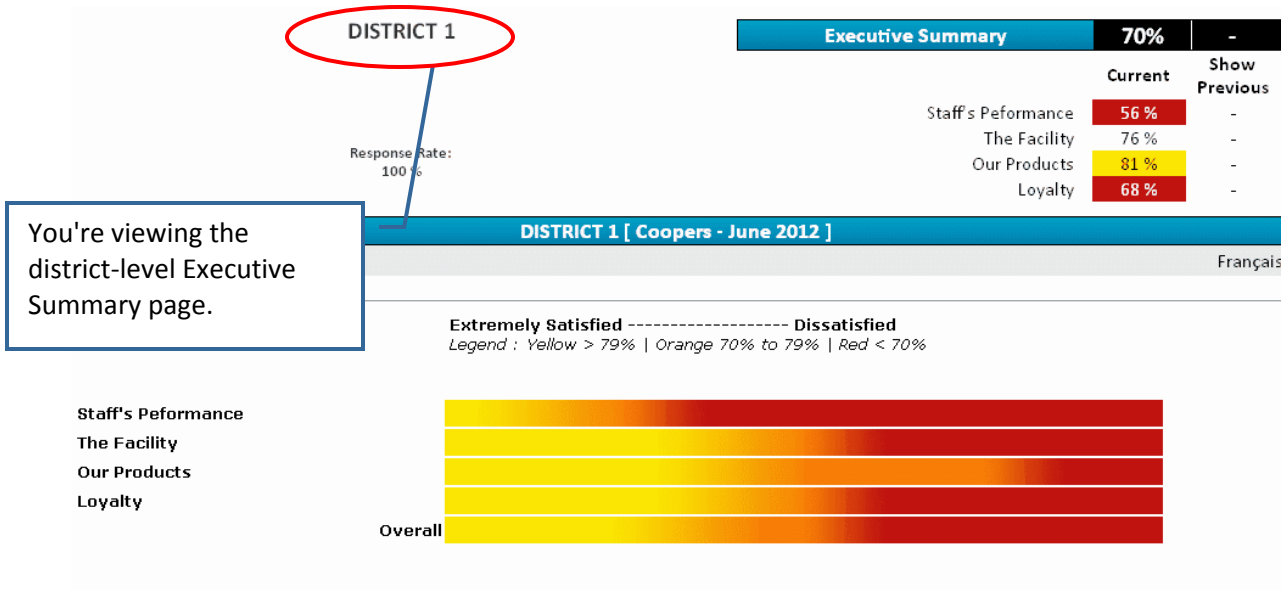
District Recap

A higher-level manager who has been assigned a region (including stores in more than one district) will see a Summary Report page which includes a District Recap giving the customer-satisfaction scores for each district represented in the region, and a Regional Summary showing the score for each store in the region. (Note that if a region includes only some, but not all, stores in a district, the scores in the District Recap will be based only on those stores, rather than on all of the stores in the district.)



Regional Manager's Summary Report With District Recap

Clicking on a district link in the District Recap will open a new browser window with an Executive Summary page for that district, very much like the Store Manager's Executive Summary page in the preceding example. The Summary Report links from the HEAT MAP in the District page will show only the stores included in the region. Other links, however (such as raw survey scores), will include all of the stores in the district.



Regional Manager's View of District Executive Summary Page

Regional Recap

A National-level executive who has been assigned all stores in the system will see a Summary Report page like that seen by a district manager, but with a Regional recap at the top, followed by the District Recap.

Clicking on a region name opens a new browser window with an Executive Summary page which is the same as that seen by the manager in charge of the region, including the same Summary Report and raw survey data links.

WELCOME | NATIONAL_ACCOUNTS

GO TO EXECUTIVESUMMARY

LOG OUT FRANÇAIS CHANGE PASSWORD

Click here for the regional-level Executive Summary page.

Recap - Region

	Region	Staff's Peformance
Class 1: Gold Level Status (Above 79%)		
1	West	82 %
2	East	81 %
Class 2: Silver Level Status (70% - 79%)		
3	Mid	75 %

Recap - District

	District	Staff's Peformance
Class 1: Gold Level Status (Above 79%)		
1	District 3	92 %
2	District 2	83 %
3	District 4	82 %
Class 3: Bronze Level Status (Below 70%)		
4	District 1	56 %

Click here for the district-level Executive Summary page.

Excel©

RESULTS - National Detailed Summary by Store:

Store	District	Region	Staff's Peformance
Class 1: Gold Level Status (Above 79%)			
Chilliwack	District 2	West	100 %
Abbotsford	District 3	Mid	92 %
Guildford	District 4	East	92 %
Richmond	District 2	West	89 %
Langley	District 2	East	85 %
Class 2: Silver Level Status (70% - 79%)			
East Van	District 4	East	77 %
Delta	District 1	East	74 %
Class 3: Bronze Level Status (Below 70%)			
Willowbrook	District 2	Mid	43 %
Hope	District 1	West	38 %

Click here for the Store Manager's Executive Summary page.

National-Level Summary Report

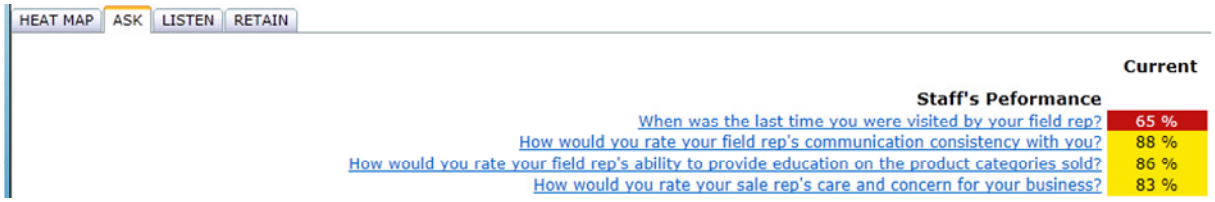
Chapter 2:

The ASK Tab and Survey Question Pages

What you need to know about the ASK tab:

- It shows you the scores for each survey question.
- You can quickly see which survey items need your immediate attention.
- It shows you if you've improved or fallen behind for each question since the last survey.
- It gives you links to each customer's answer to each question.
- Those links let you go straight to customer records and alert information.
  (Notice that you're always just a link or two away from customer records and alerts!)

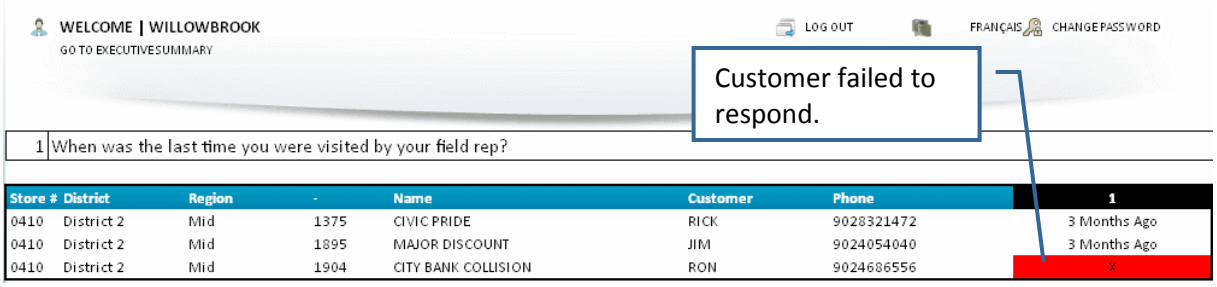
The ASK tab gives you a detailed breakdown of the Executive Summary scores. It includes each survey question, organized by category, along with colour coded (Gold/Silver/Bronze) customer-satisfaction scores for each question. Like the Executive Summary, the ASK tab includes a Show Previous column to the right of the current survey scores, allowing you to see each question's scores from the previous survey, along with up-and down-arrows showing progress (a higher score in the current survey) or falling behind (a lower current-survey score) for each question.



The ASK Tab

Survey Question Results Page

Clicking on a question takes you to the Survey Question Result page for that question. It includes each customer's raw survey score for that question, which, depending on the question, may be a number in the 1 to 10 range, indicating low to high satisfaction, or a Yes/No/Maybe answer, a time-period/date, a percentage, or a response in another format, depending on the question and the design of the survey. The majority of questions, however, take a numerical rating as an answer.



Survey Question Results Page

Raw survey scores are not colour-coded, with one exception. If a customer in the survey failed to respond to the survey, the raw score will be an "x" with bright red highlighting, indicating no response.

The Survey Question Result page shows basic information for each customer, including the region, district, customer name, phone number, the store responsible for providing service to the customer, and a link to the customer's Individual Survey Results page (covered in depth in Chapter 5).

Chapter 3:

The LISTEN Tab and Comment Analytics Page

What you need to know:

- This is where you go to find out what customers are saying about your store.
- The LISTEN Tab has links to all customer comments.
- It sorts comments by whether they're positive, negative, or neutral, or contain keywords.
- When you read a comment, it's exactly what the customer said, word-for-word.

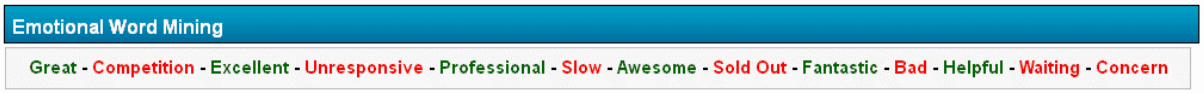
Finding Out What Customers Are Saying

The LISTEN Tab may look simple, but it's the key to what your customers are saying about your store.

The LISTEN Tab

Emotional Word Mining

First, there's the Emotional Word Mining list, with a set of colour-coded words displayed across your screen. Words in green are positive -- you want to see those in customer comments. Words in red are negative -- when you see any of them in a comment, you know that it's time to find out what's wrong and take care of the problems.



The Emotional Word List

These words, like the survey questions, have been chosen by [responsible people] from your company, along with Compechek's highly experienced professional consultants. The lists of positive and negative words are intended to capture your customers' genuine emotional responses to your store. The ALR system automatically searches through the text of each comment, looking for these words, and it classifies the comments accordingly.

Note: Anyone can use negative words in a positive way, or vice versa: "The competition is slow compared to you guys!" or "Hardly professional, and not very helpful." The purpose of ALR's Emotional Word Mining feature is to draw your attention to comments which may need attention.

It is *always* your responsibility to read the comments and understand them.

Keyword Mining

Below the Emotional Word Mining list is the Keyword Mining list. Like the emotional words, keywords are chosen by people from your company, along with Compechek's consultants. These words may not be strongly positive or negative, and they may not be very emotional, but they refer to things that your company is particularly concerned about at the time of the survey and want current feedback on, like prices, service, management, special promotions, or even specific items in stock.

The Keyword List

Both the keyword list and the emotional word list can be completely customized by your company's ALR system administrator at any time. This means that when there's a new promotion, words connected with it can be added to the keyword list, and they will automatically be counted and highlighted in both new and old comments. The same is true of emotional words; if there's a new potential problem, or if you want to see whether a new way of serving customers is working out the way you want it to, the appropriate positive or negative words can be added to the emotional word list.

Responses by Category

Below the Keyword List, you can see the number of responses in each word-mining category: Neutral (no emotional words and no keywords), Positive (at least one positive emotional word), Negative (at least one negative emotional word), Keyword (at least one keyword), and Total (the total number of comments in each group).

Responses	Neutral	Positive	Negative	Keyword	Total
	16	6	3	2	27

Response Categories

Note: A single comment may be in more than one group -- if it contains a positive word, a negative word, and a keyword, for example, it will be listed in all three groups, and it count as three different listings in the total.

The Comment Analytics Pages

When you click on any of the numbers beneath a category heading, you will go to the Comment Analytics page for that category.

Each word mining category has a Comment Analytics page. It lists each comment, with the store, name, and contact information of the customer who made the comment, along with the full text of the comment itself.

0699	Richmond	District 2	010360	4186903521	GUY HARVEY	You are guys are awesome! Keep up the good work!!

Comment Analytics Listing

In the Positive Comment Analytics page, positive words from the Emotional Word Mining list are highlighted, in the Negative Comment Analytics page, negative words from the list are highlighted, and in the keyword page, keywords are highlighted. This means that if a comment contains positive, negative, and keywords, only the relevant words will be highlighted in each of the Comment Analytics pages in which it appears.

Great - Excellent - Professional - Awesome - Fantastic - Helpful

Store #	Store Name	District	-	Phone	Customer	Comment
0322	Chilliwack	District 2	3739	9026723591	JODY	Everything is excellent! The training provided last week was very well done. Thank you Chad!
0699	Richmond	District 2	010360	4186903521	GUY HARVEY	You are guys are awesome! Keep up the good work!!
0035	Guildford	District 4	3160	5065484294	YVON	I am super happy with ABC Auto. The service is awesome.
0035	Guildford	District 4	5150	5065457978	CURTIS	In my 38 years in business I have not received such premium service with ABC Auto. Glen Ford the sales rep and Colin do a fantastic job.
0059	Vancouver	District 4	1385	9025669071	PAUL	Drivers are fantastic, friendly, the store is amazing. They go above and beyond. You couldnt ask for a better rep than Glen. Part returns sit, they only pick them up once a week, that is my only pet peeve. They say they are too busy. We right them up, they get put aside then the mechanics add stuff on top and it gets confusing.
0059	Vancouver	District 4	7700	5067838966	CHRIS	ABC Auto has done a great job of taking care of everything they need...delivery has been fantastic!

Comment Analytics = Emotional Word Mining = Negative = 6 Entries

Competition - Unresponsive - Slow - Sold Out - Bad - Waiting - Concern - Confusing

Store #	Store Name	District	-	Phone	Customer	Comment
0410	Willowbrook	District 2	1895	9024054040	JIM	I find the produce manager to be unresponsive to my concerns. I have asked him to increase the organic produce selection a number of times. He agrees but then does nothing about it. Frustrating and might shop elsewhere!
0059	Vancouver	District 4	1385	9025669071	PAUL	Drivers are fantastic, friendly, the store is amazing. They go above and beyond. You couldnt ask for a better rep than Glen. Part returns sit, they only pick them up once a week, that is my only pet peeve. They say they are too busy. We right them up, they get put aside then the mechanics add stuff on top and it gets confusing.

Sample Positive and Negative Comments from the Total Comment Analytics Page

The Comment Analytics page for the Total word-mining category combines the contents of all of the other pages. It includes Comment Analytics sections for Neutral, Positive, Negative, and Keyword comments. If a comment falls into more than one category, it will be listed in each of those sections, with only the appropriate words highlighted in each section.

Read the comments!

All of them -- the good, the bad, and the neutral -- are like gold. If you read them, understand them, and act on them, they will help you make your store more profitable, and more responsive to customers' needs, and in the long run, they will make your job much easier.

Chapter 4:

The **RETAIN** Tab and Alerts Pages

What you need to know:

- It tells you how many alerts you have.
- It tells you how many alerts are new, and how many are overdue.
- If you pay attention to it, you will be on top of customer-relations problems.
- If you don't pay attention to it, customer-relations problems will be on top of *you*.

Alerts by Type

The RETAIN Tab shows the number of alerts for your store, by alert type, and by status.

HEAT MAP | ASK | LISTEN | RETAIN

Alert Type:	New:	In Progress:	Overdue:	Closed:	Total:
An answer given to a question triggered this alert	0	0	2	6	8
A resulting score % for the survey was below the admin limit	0	0	0	1	1
There were negative keywords found in the comment	0	0	1	1	2
The interviewer created this alert	0	0	2	1	3
	0	0	5	9	14
	0.0 %	0.0 %	35.7 %	64.3 %	100.0 %

The RETAIN Tab

The rows represent the types of alert. There are four types:

1. An answer given to a question triggered this alert.

This means that the answer to at least one survey question by itself suggested that there was a problem. It could have been a low rating (on a 1 to 10 scale), a "Yes" or "No" to a key question, or some other kind of answer, depending on the survey question itself.

2. A resulting score % for the survey was below the admin limit.

The calculated score for at least part of the survey was below the acceptable level, as set by the survey administrator in your company.

3. There were negative keywords found in the comment.

At least one of the negative words from the Emotional Word Mining list turned up in the customer's comment.

4. The interviewer created this alert .

After interviewing the customer, the Compechek interviewer came to the conclusion, based on experience and intuition, that there was a problem, even though the customer hadn't openly said so. Compechek interviewers are experienced, trained professionals; if you see an alert in this category, take it seriously.

Alerts by Status

The columns represent the categories of alert status; at the bottom of each column, you will see the percentage of alerts currently in that category. When you see a number other than zero (besides the percentage at the bottom) in any of the columns, you can click on it to bring up a page listing the alerts for the selected type of alert and status. If there is a "3" in the Overdue column and the "The interviewer created this alert" row, for example, clicking on it would bring you to a page listing all overdue alerts for your store which were created by the interviewer.

There are five alert status categories:

1. New

New alerts are ones which the ALR system has recently issued, which have not yet been viewed, and which are not yet overdue. When the system issues a new alert, it automatically sends e-mail notification to the store manager; this notification includes the type of alert, the name of the customer, the text of any customer comments, and a link to the customer's Individual Survey Results page.

When an alert is new, the first thing that you should do is view the alert. The quickest way to do this from the RETAIN Tab is to simply click on the number in the New column that tells you there's a new alert. As described above, that takes you to a page listing new alerts of the selected type. From there, you can click on the Details link for the new alert, and go to the Individual Survey Results page for the customer associated with the alert. When you go to that page, the ALR system recognizes that you have viewed the alert.

2. In Progress

After you (or another person who has been assigned that responsibility in the ALR system) view a new alert for your store, its status automatically changes to "In Progress."

When an alert is in progress, it is your responsibility as store manager to communicate with the customer (by e-mail, phone, or personal visit) and resolve the problem. The ALR system includes e-mail forms which you can use to let the customer know that you are looking into the matter, and to thank the customer for input and provide follow-up contact information.

To: customer@email.address

Cc: records1@local.office

Subject: Our Priority

Message:

```
Attn: MARTY, PETER'S AUTO

During our last quarterly installer satisfaction survey we were made
aware of a possible issue that requires further attention by our
management team. We will be in touch with you in the following days to
have discussions with you.

If you would like to provide additional comments by reply email, please
do so.

We look forward to further developing our relationship and improving
our service to you. This is our #1 priority!
```

Load English Form Letter | Load French Form Letter

Send

Email Form For Contacting the Customer

All actions taken to resolve the problem should be recorded in the Diary section of the customer's Individual Survey Results page. Any e-mail messages sent by the ALR system, and any of the system's form messages which you send, will be automatically recorded in the diary. The diary will also automatically record the day and time that you viewed the alert.

You can, in addition, make entries directly into the diary. You should do this any time that you take an action regarding the alert which was not automatically recorded (i.e., making a phone call, talking to the customer in person, etc.), and when you want to include relevant information or comments as part of the permanent record of the alert.

3. Overdue

If a new alert has not been viewed after a specified amount of time, or if it has not been closed after a specified time, the system automatically moves the alert to the Overdue category. It also sends an e-mail message to the appropriate higher-level manager, explaining that the alert is overdue, and suggesting intervention with the store manager in order to resolve the problem.

4. Closed

Once you have addressed the customer's problem completely (either by resolving it to the customer's satisfaction, or by determining that it is beyond resolution), you can close the alert (using the Close button on the customer's Individual Survey Results page).

Clicking on the Close button brings up the Email page, with the Close Alert form letter, and the Send Email/Close Alert button.

Note: If you attempt to close an alert *without* posting anything to the diary or sending any e-mail messages to the customer, you will see the following Subject line and body text for the email message:

Subject: Alert Closed Without Being Properly Documented

Message:

```
Please note how to properly address and document a customer alert.

1) Contact the customer: You must contact the installer (Phone or visit)
to discuss the situation.  You can also send the installer an email -
click on the Initial email or Follow-up email button
2) Document your actions in the Diary (phone, visit, resolution actions,
comments, and follow up actions): Enter the text for each action and
click on ADD A DIARY RECORD.
3) Close the Alert - Click on CLOSE THIS ALERT button: The system will
create a closing alert email to your District Manager for you to send.
Add text to the body of the email and click on the SEND button.

If you wish to proceed in closing this alert at this time, enter the
reason for closing an alert without making a diary entry in the space
below.
:
```

If you see this warning, follow the instructions. Under most circumstances, that means to follow the three steps outlined in the warning: contact the customer, document your actions in the Diary, and then close the alert. If there are circumstances where there are good reasons not to do this, then you can enter those reasons in the space below the warning.

The email message will be sent to the district manager, and possibly (depending on their account settings) to other upper-level managers. It will tell them that they have the option of re-opening the alert. If an upper-level manager re-opens an alert, it will automatically be moved back to "In Progress" or "Overdue" status, depending on its status prior to being closed.

5. Total

The Total column shows the total number of alerts of each type, regardless of their current status. The bottom row of the Total column (just above the total percentage), shows the grand total: all alerts of all types and status.

Higher-Level Management

District and higher-level managers will see the same basic information on the RETAIN Tab and on the alert pages as do Store Managers, with three exceptions:

- Upper-level managers will see alerts for all of the stores in their district or region.
- On the Alerts pages, they will see an Open Alert link next to each closed alert listing, allowing them to reopen closed alerts that may not have been dealt with to the satisfaction of the higher management.
- If a Store Manager has closed an alert without either sending an email message to the customer, or posting an entry in the Diary, upper-level managers will see a red asterisk next to the listing for that alert on the Alerts page drawing attention of higher management to review this alert.

CLOSED ALERTS (7)

Region	District	Store	-	Installer	Customer	Survey Date	Details	
An answer given to a question triggered this alert (5)								
East	District 4	0035	3160	ULTRA AUTO	YVON	Jul 03, 2011	Details	* Open Alert
East	District 4	0059	1385	CITY COLLISION	PAUL	Jul 03, 2011	Details	Open Alert
East	District 4	0511	123	PETER'S AUTO	MARTY	May 21, 2012	Details	* Open Alert
East	District 4	0511	5225	RCMP TIRE SERVICE	PAT	May 21, 2012	Details	Open Alert

Upper-level Management View of the Alert List

Full Notification of Lower-Level Managers

When an upper-level manager posts to the alert diary on a Customer's Individual Survey Results page, the ALR system automatically sends email notification to all lower-level managers who have been assigned responsibility for that store. The email message tells lower-level managers that there is a new diary entry for the customer in question, and that they should view the diary again.

Enforcing 100% Accountability

This allows upper-level managers to quickly and efficiently communicate to all lower-level managers about such things as company policy and the need for effective customer resolution, with specific reference to a particular customer or alert. This also means that the ALR system enforces 100% accountability from top to bottom regarding alerts, from the highest level on down. If a national manager, for example, posts a comment in a diary regarding an alert, any Regional, District, or Store Manager with responsibility for that store will be notified, and a record of that notification will be included in the diary, making it impossible to hide from the alert.

Note: For more information about the 'diary' and it's functionality, please refer to Chapter 5.

Enforcing Accountability

Chapter 5:

Individual Survey Results Page (ISR)

What you need to know:

- There is an ISR page for each customer in the survey.
- It includes the customer's contact information and raw survey scores.
- It also includes the diary recording alerts, responses, and customer contacts.
- It is where you go to send emails regarding an alert, and to close the alert.
- When you get an alert, you must respond to it by means of the customer's ISR page.
- Every action that you take should be recorded in the diary.

Your Command Center for Response

The Individual Survey Results page is the command center for responding to individual customers.

The ISR page is fairly long compared to most pages in the ALR system, and it is broken down into several sections. It has a set of navigation links at the top of the page (below the standard ALR page heading) which you can click on to go to specific sections:

Link	Description
Survey Questions	Goes directly to the Survey Question section of the page.
View Comments	Goes to the Comment Data section of the page, which includes the exact text of the customer's comments.
Add a Diary Record	Goes to the Diary entry box, allowing you to make an entry in the Diary.
Send Customer Emails	Goes to the Initial Email and Follow-Up Email buttons.
Close Alert	Goes to the Close Alert button.
View Diary	Goes to the top (most recent) entry in the Diary.

All of these sections and features are described in detail below.

Individual Results Section

The left side of the section immediately below the page navigation links contains the customer information record and a summary of the customer's survey scores.

Name	PETER'S AUTO
Customer	MARTY
Phone	5065463284
-	123
Email	customer@email.address
Store #	0511
Manager	Jake Blair
	Update

Customer Information Section of Individual Survey Results Page

The customer information record includes some contact-information fields which can be edited: the Customer name, Phone, and Email address. When you make changes to any of these fields, click on the Update button at the bottom of the customer information record in order to update the record.

Overall Score	62 %
Staff's Peformance	73 %
The Facility	66 %
Our Products	68 %
Loyalty	40 %

Survey Score Summary Section of Individual Survey Results Page

The customer's survey score summary looks very much like the survey score list in the Executive Summary, with scores colour-coded (Gold, Silver, Bronze), except that it shows only the scores for that individual customer. It does not include links to the survey questions raw scores, since those are listed immediately below the Individual Results Section. It also does not include scores from the previous survey.

Survey Questions Section

The Survey Questions section lists the survey questions, grouped by category, with the customers raw-score response to each question shown in the column to the left of the question itself. As described in Chapter 2: The ASK Tab and Survey Question Pages, the format of the raw scores depends on the type of question, either a rating of a 1 to 10 scale, Yes/No/Maybe, or a multiple choice question.

Survey Questions

Staff's Peformance	
Last Month	When was the last time you were visited by your field rep?
10	How would you rate your field rep's communication consistency with you?
7	How would you rate your field rep's ability to provide education on the product categories sold?
7	How would you rate your sale rep's care and concern for your business?
The Facility	
7	How would you rate the information and data support available to you?
7	How would you rate the level of technical support available to you?
7	How would you rate the marketing and promotional tools available to you?
5	How would you rate the consistency of lead times on deliveries?
7	How would you rate the fill rates provided to you?

Survey Questions Section of Individual Survey Results Page

Comments Data Section

The Comments Data section shows the complete, word-for-word text of the customer's comments, along with store, district, and customer contact information. The date of the survey appears below the customer and comment information.

Comments Data

Store #	Store Name	District	-	Phone	Customer	Comment
0511	East Van	District 4	123	5065463284	MARTY	The store is very disorganized. They keep moving product around the store and I can never just run in and out in a few minutes. Also, the checkout is very slow, always long line ups!

Comments Data Section of Individual Survey Results Page

Note that if you update the customer name or phone number in the Individual Results section, the updated information will be visible in the Comments Data section the next time that you go to the Individual Survey Results page, rather than immediately.

Email and Close Buttons

Just below the Comments Data are three buttons:

Email and Close Button Section of Individual Survey Results Page

Each of them brings up the email form page with a form letter appropriate for the situation:

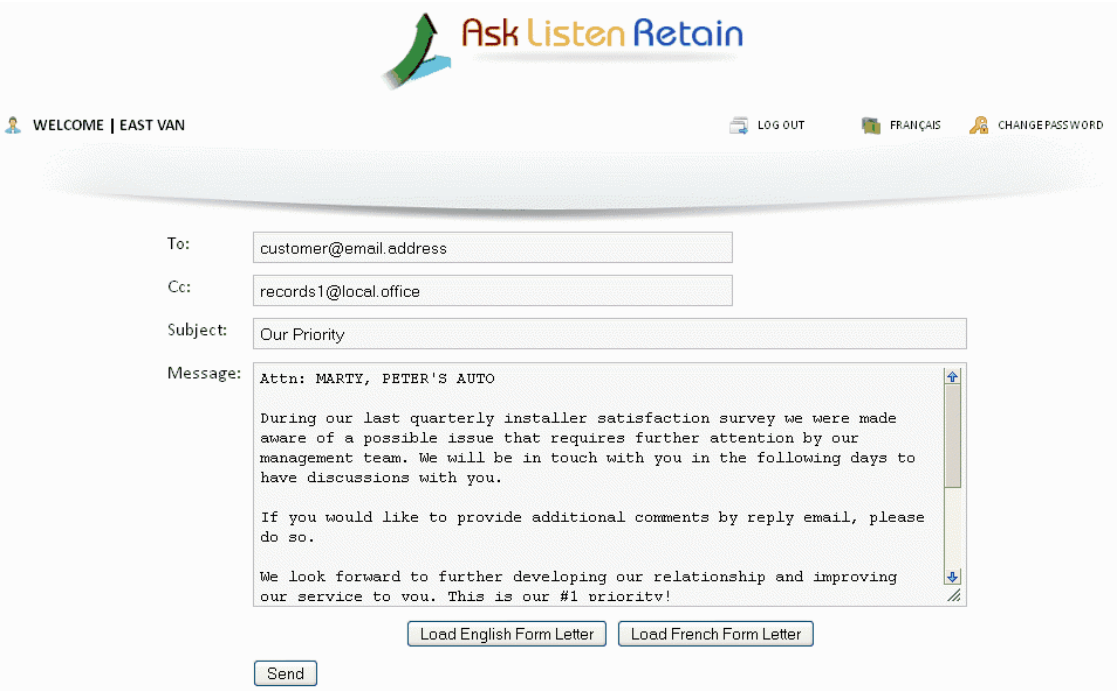
Button	Description
Initial Email	This is the first message that you send to a customer when the system has issued an alert for that customer. Typically, the form letter will say that you have become aware of a problem, that you will be contacting the customer about it shortly, and that the customer is welcome to reply to the message with additional comments or information.
Follow-Up Email	This is the message that you send after you have contacted the customer and taken the appropriate steps toward resolving the problem. It typically lets the

	customer know that you believe that the problems have been adequately resolved, and invites the customer to contact you in the event of further problems.
Close Alert	This button does two things: it closes the alert, and it sends an email message to your district manager (and possibly other upper managers, depending on how their accounts are set) saying that the alert has been closed. The message will typically include a link to the alert page, and will ask the district manager to view the alert. Note: If you close the alert before taking the proper steps to resolve it, the ALR system will start the form letter with a statement that the alert is being closed improperly, along with instructions to you to either close it properly, or add an explanation of why you are closing it without taking the appropriate steps (see [chapter, section]).

When an alert had been closed, all of these buttons are inactive and greyed-out.

The Email Form Page

When you use any ALR function that involves sending email, the system will bring up the email form page. It includes four standard email fields: To, Cc, Subject, and Message.



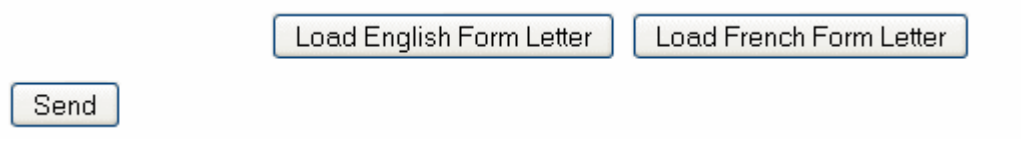
Email Forms Page

Under most circumstances, you can edit the contents of each of the fields except the To: field; its contains the email addresses of the recipients, as set in the manager and customer records by the system administrator. You can add recipients using the Cc: field, but you cannot remove them from the To: field.

Typically, the Subject: and Message: fields will be filled in by default with form-letter content which is set by the system administrator. You can edit or delete this content as required; note, however, that

besides being seen by the customer and/or upper management, the contents of the message will be permanently recorded in the Diary section of the customer's Individual Survey results page.

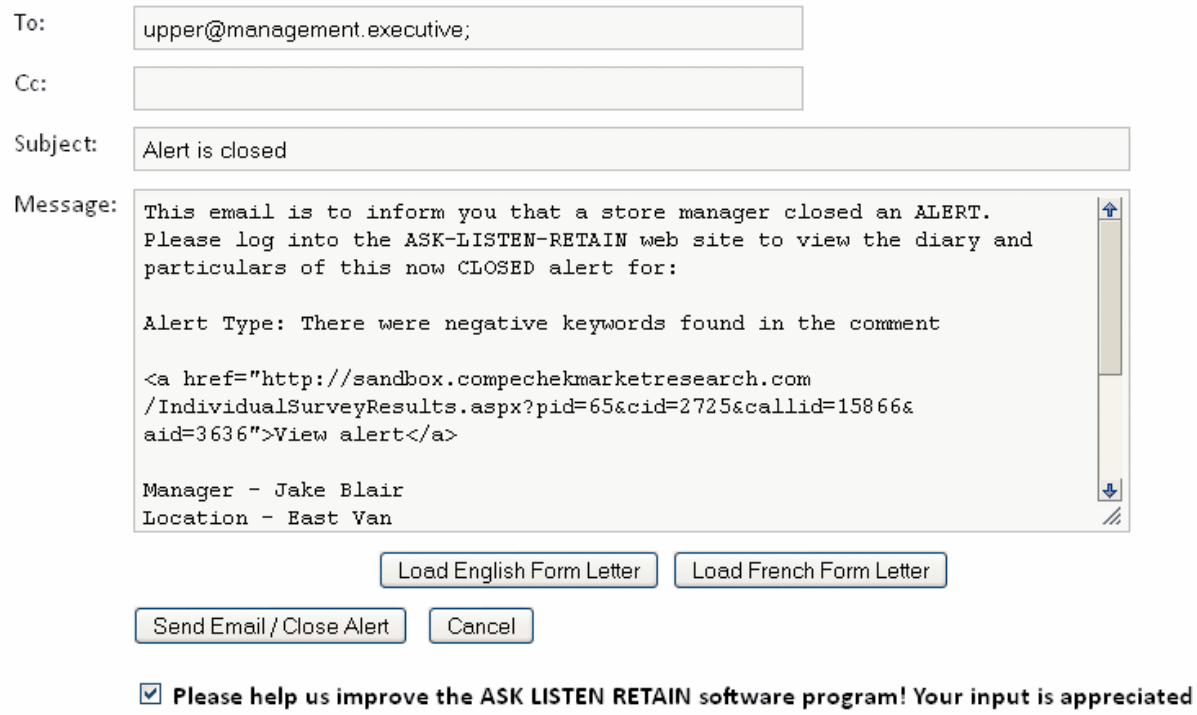
Below the Message: field are two buttons: Load English Form Letter and Load French Form Letter. As the names imply, they allow you to switch between the English and French text of the form letter.



Send Email Messages and Closing an Alert

For the Initial Email and Follow-Up Email messages, there will be a single button below the English/French buttons: Send. When you click on it, the system will send the email message, and it will return you to the customer's ISR page. The text, subject, recipient(s) of the message, the sender, and the time sent are all automatically recorded in the Diary section of that page. (Note that recipients listed in the Cc: field are not recorded.)

For the Close Alert message, the name of the Send Email button changes to Send Email/Close Alert, and, as the name implies, along with sending the message and recording it in the Diary, it closes the alert.



Close Alert Form

When an alert is closed, it will be listed in the Closed category on the Retain tab and on Alert pages. When it is listed on an Alert page, an Open Alert link (next to the Details link) will be visible to upper-level managers.

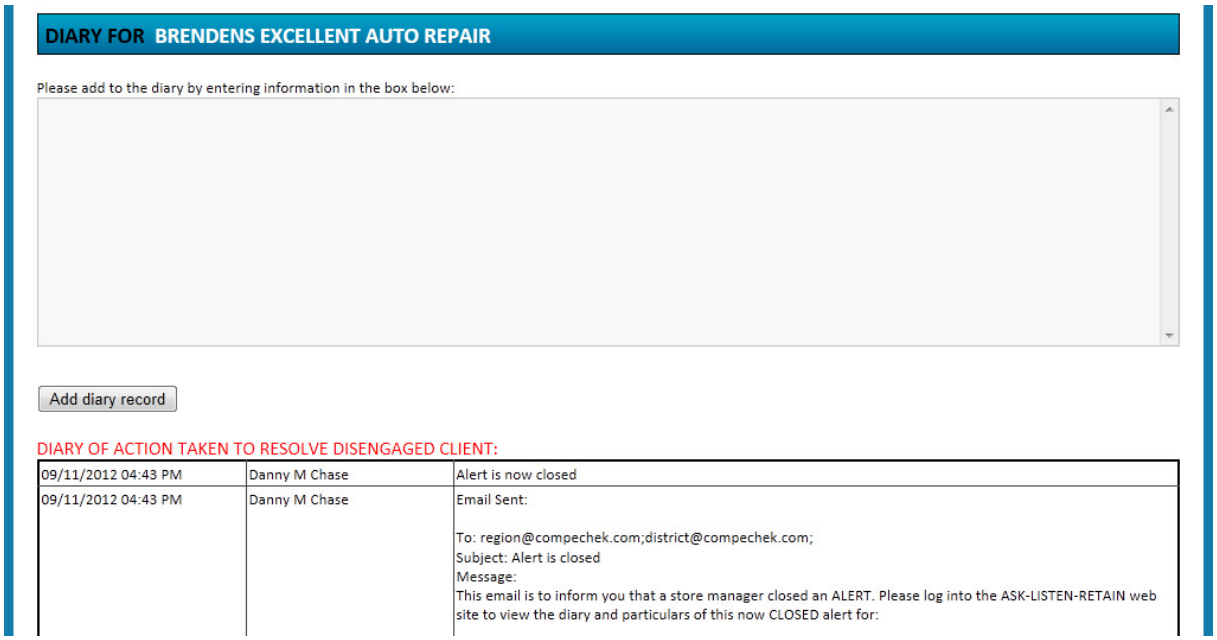
The Close Alert message also has a Cancel button next to the Send Email/Close Alert button. This allows you to exit the Email page and return to the ISR page without sending the message or closing the alert, if you are not sure that it is the appropriate time to close it.

Close Alert Buttons and ALR Feedback Checkbox

Below the Send Email/Close Alert and Cancel buttons, you will see a checkbox labeled "Please help us improve the ASK LISTEN RETAIN software program! Your input is appreciated." If you select that option, then after you click on the Send Email/Close Alert button, you will have the opportunity to write and send a message to the ALR software developers. After you have written you message, you can click on the Send Email/Close Alert button again to send the message, close the alert, and return to the ISR page.

The Diary Section

Below the Email and Close Alert buttons on the Individual Survey results page, is the diary section. It will be labeled "Diary For" followed by the customer name: "Diary For Auto Parts Unlimited" or "Diary For Joe's Radiator Shop."



The below screen shot displays how the diary becomes a record of all of the actions taken within the ALR system to resolve the customer's problems, with the most recent action listed at the top, and the earliest at the bottom.

DIARY OF ACTION TAKEN TO RESOLVE DISENGAGED CLIENT:

07/03/2011 11:57 AM	Jake Blair	Email Sent: To: customers@compechek.com Subject: Our Priority Message: Attn: PAUL, CITY COLLISION During our last quarterly installer satisfaction survey we were made aware of a possible issue that requires further attention by our management team. We will be in touch with you in the following days to have discussions with you. If you would like to provide additional comments by reply email, please do so. We look forward to further developing our relationship and improving ABC's service to you. This is our #1 priority! Yours truly, Jake Blair stores@compechek.com Store #9 986-754-6657
07/03/2011 11:57 AM	Jake Blair	Store Manager: Based on these comments we are having a staff meeting to deal with handling returns in a more efficient manner...
07/03/2011 11:55 AM	Jake Blair	Alert viewed
07/03/2011 10:43 AM	Compechek	Notification sent to store manager :

Diary Section of Individual Survey Results Page

The diary itself has the heading "DIARY OF ACTION TAKEN TO RESOLVE DISENGAGED CLIENT:" and consists of three columns:

Column	Description
Date and Time	The date and time when the action was taken. The time shown will be adjusted for your local time, as set in your user account.
Login Name	The ALR login name of the person taking the action.
Action	When the ALR system automatically records an action, it includes a brief description of the action "Alert opened," "alert is now closed," etc. In the case of an email message, it includes the subject, the text of the message itself, and the recipients listed in the message's To: field. As noted above, it does not include recipients listed in the Cc: field.

Adding Diary Entries

If you have taken actions to resolve the problem outside of the ALR system (a personal visit or a phone call, for example), or if you have a comment or relevant information which was not automatically recorded, you can add a diary record by hand. The diary should include a complete record of all actions taken in connection with the problem, so it is important to add such entries when they are not automatically recorded.

Please add to the diary by entering information in the box below:

```
Spoke with customer by phone, discussed problems with access to loading area, spoke with our driver as well, it looks like
we've resolved the problem.
Also changed delivery days to Thurs., when full stockroom crew is on site.
```

Add diary record

Adding a Diary Entry

At the top of the Diary section is a large text-entry box labeled "Please add to the diary by entering information in the box below:" Enter your diary record in this box, then click on the Add diary record button below it, on the left-hand side. Your entry will be added to the diary as the topmost (most recent) action.

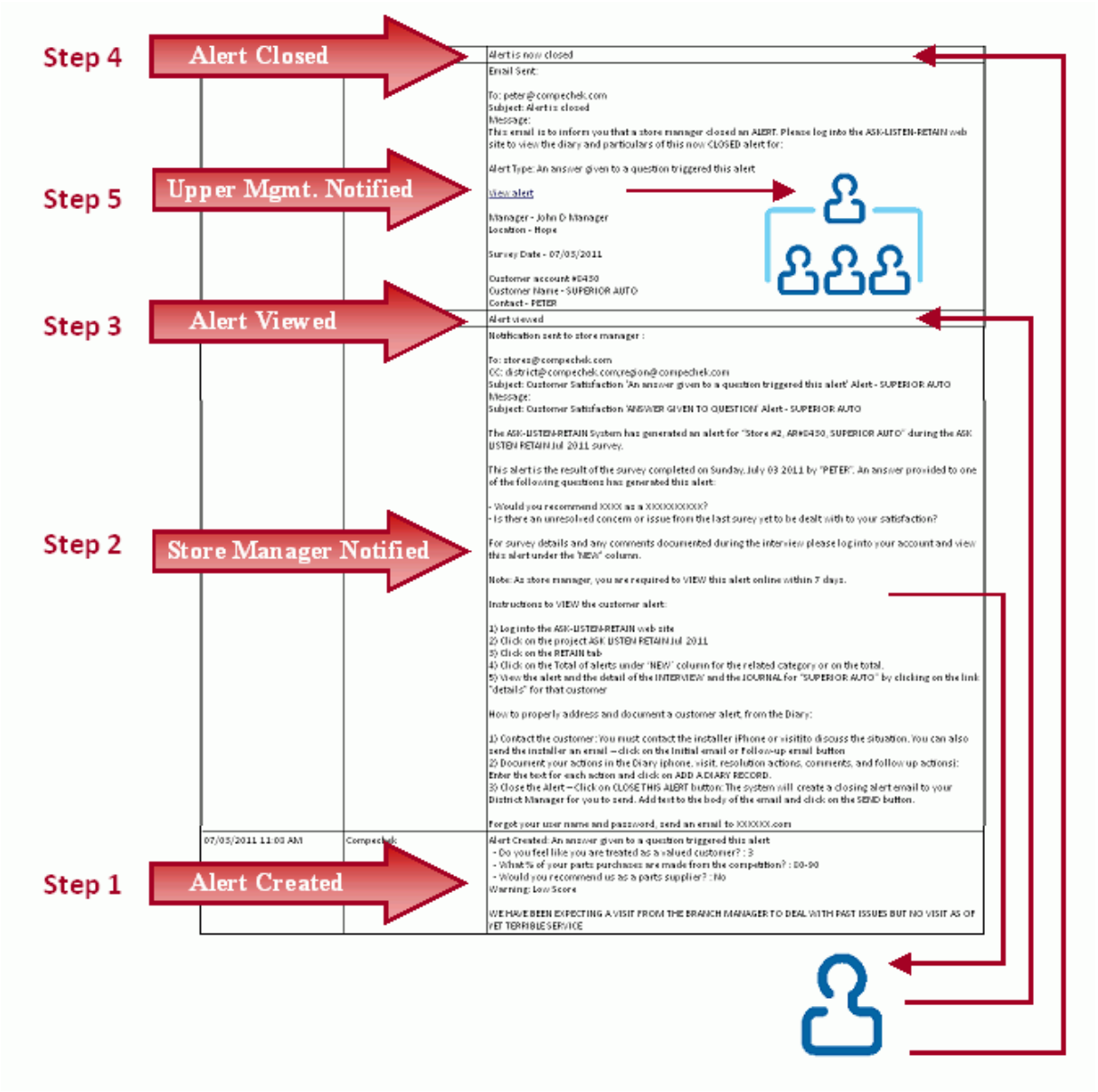
Add diary record Entry has been added to the diary

DIARY OF ACTION TAKEN TO RESOLVE DISENGAGED CLIENT:

10/14/2012 08:08 AM	East_Van_mgr	Store Manager: Spoke with customer by phone, discussed problems with access to loading area, spoke with our driver as well, it looks like we've resolved the problem. Also changed delivery days to Thurs., when full stockroom crew is on site.

Entry Added to Diary

Note: Diary entries are permanent and cannot be edited. Nobody within your company's ALR system can edit or delete any diary entries, including your company's system administrator.



The Alert Process: Step By Step

Higher-Level Management

Higher-level managers will see the same information on the ISR pages as does a Store Manager. They do, however, have the added ability to edit the list of recipients in the To: field on the email forms page; they can add or remove recipients for all three types of form letter.

If higher-level management posts information into the diary, an automated email will be sent to all management levels below that have this particular store assigned to them. This is a convenient way for higher management to communicate about a specific alert and customer situation. This email notification is also diarized as to which managers were sent the email.

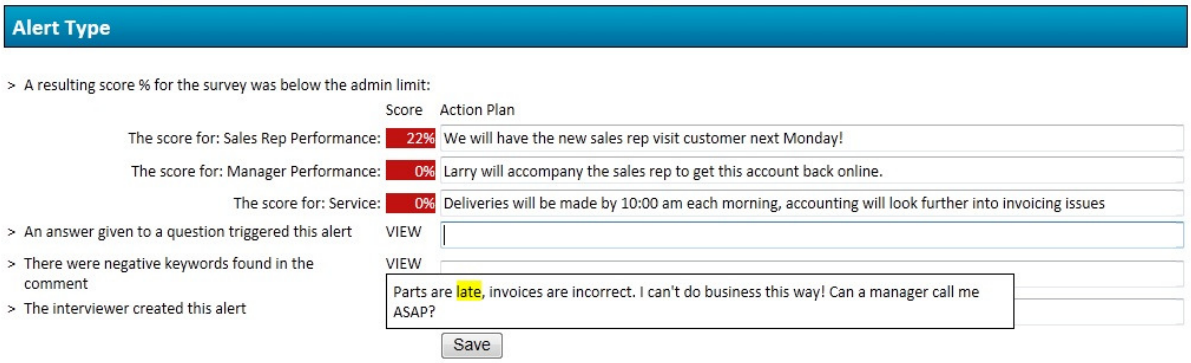
Higher-level managers can also reopen alerts. On the Alerts pages (see Chapter 4: The Retain Tab and Alerts Pages), upper-level managers will see an Open Alerts link to the right of the Details link for all closed alerts. If a store manager has closed an alert without sending an email message to the customer or posting to the diary, upper-level managers will also see a red asterisk next to the Open Alerts link; this indicates that the alert was closed improperly. Neither the Open Alerts link nor the red asterisk will be visible to Store Managers.

Detail of Alert List With Improperly-Closed Alerts

Important: Higher-level managers should check the Alerts pages on a regular basis to look for red asterisks, since they are likely to indicate not only improperly-closed alerts, but more importantly, customer-relations problems which are not being adequately handled.

OPTIONAL: Advanced Alerts

Your company may have decided to work with alerts in a more advanced method. If so, you will see this section called "Alert Type" right beneath the Comments Data section.



Advanced Alerts Section

In this 'Advanced Alert' area, the store manager is required to make an entry for each alert type that was created for this survey. In the example above, the answer given by the customer in this particular survey created an alert of each alert type. Because of this the store manager was required to make an entry that describes what will be done to rectify the situation for each specific alert. This is called the 'Action Plan'. An 'Action Plan' is required to be entered beside each alert type, i.e. low score for each category (in this survey the categories were Sales Rep Performance, Manager Performance, Service) as well as the other 3 alert types (as described in Chapter 4 - Retain Tab). If the customer's responses created only one alert, for example, then an 'Action Plan' would only have to be entered into the one empty box, all the other boxes would be grayed out and no entry would be required of the store manager.

Beside each of these 3 alert types, i.e. An answer give to a question, negative keywords, and interviewer generated alert, there is a link to 'VIEW' the details of the alert. In the example above, as the mouse hovers over the 'VIEW' link, the system displays the comment made by the customer with the negative keyword highlighted. This is a convenient way to quickly review the reason for the alert and to determine the best course of action to be entered into the empty box beside the alert type.

Note: An alert cannot be closed until there is an entry made and saved beside each empty box (that is not grayed out by the system) describing the action plan for each applicable alert type.

Chapter 6:

Quick How-To Guide

1. I'm a store manager and I just got an alert. What do I do now?

First of all, **don't ignore it!**

If you ignore it, it will become overdue, and then it will automatically come to the attention of your district manager.

But there are more important reasons to pay attention to an alert. It's an opportunity to improve relations with your customers, to make your store a better store, to make yourself a better manager, and to visibly contribute to the success of your district and your company.

View the alert - the easy way.

The first action you should take is to log onto the ALR system (see Overview: Getting Started with ASK LISTEN RETAIN) and view the alert. The easiest way to do this is to just click on the "View alert here" link in the email message notifying you of the alert.

If the easy way doesn't work.

If for some reason you can't use the email link, you should be able to view the alert by following these steps:

1. Log onto the system.
2. Select the current survey on the Survey List page.
3. In the Executive Summary page, click on the Retain tab.
4. In the New column on the Retain tab, find the number at the bottom, just above the percentage; it should be 1 (or higher).
5. Click on that number to go to the New Alerts page for all alerts.
6. Your alert will be listed there, with a link labeled Details in the column on the far right.
7. Click on the Details link. You will see the Individual Survey Results (ISR) page for the customer who is the subject of the alert.
8. Click on the View Diary link in the upper right, or scroll down to the Diary section at the bottom of the page.
9. Read the diary.

The ALR system will now know that you have viewed the alert.

2. OK. I viewed the alert. What should I do next?

The first thing to do is to try to understand the nature of the problem.

1. If the Comments Data section of the Individual Survey Results page includes a comment, read it.

2. Look at the first (bottom-most) entry in the diary, which should start with the label "Alert Created."

It will include the reason for the alert, along with any additional information which the survey-taker thought was relevant.

The next thing to do is contact the customer.

1. Click on the Select Customer Emails link at the top of the ISR page, or scroll to the email button section, just below the Comments Data and above the Diary section.
2. Click on the Initial Email button.

The ALR system will automatically provide you with a form email message which you can send out as-is simply by clicking the Send Email button on the email form page. You can, if you want to, edit or add to that message, based on your understanding of the problem, or how you intend to handle it.

Next, take care of the problem.

The initial email message will generally say that you will be contacting the customer in a few days, so don't just send the message and leave it at that. Call or otherwise contact the customer directly, find out the details of the problem, and take whatever steps are necessary to resolve it.

Diarize your actions.

Make sure to enter a diary posting about what you did to resolve the customer concern. This will keep higher-management aware that you have done all you can to re-engage this unhappy customer. Remember that the higher-level manager will receive an email notification about this alert either when it is closed, or if the alert goes into Overdue status.

After that, do a follow-up.

After you have resolved the problem to the customer's satisfaction, you can use the Follow-Up Email button (next to the Initial Email button on the customer's ISR page) to send a follow-up email message.

Under most circumstances, this will simply be a say of closing out the problem with the customer; it also gives the customer an opportunity to let you know if anything was unresolved, or if there are any further problems.

Finally, close the alert.

1. To the right of the Follow-Up Email button is the Close Alert button.
2. Click on it and send the Alert closed email message to your upper manager; doing this also automatically closes the alert.

3. I just received an Overdue Alert notice. What do I do now?

Take care of the alert, following the steps outlined in 1 and 2, above.

If the alert is simply overdue, with nothing preventing it from going forward, then taking care of it promptly when you do get the notice should be enough in most cases.

Be aware, however, that your district manager, and possibly other high-level managers, will have been notified of the overdue alert at the same time that were.

Don't ignore it.

If there are problems which prevent the alert from moving forward, don't ignore it.

Take whatever actions (discussing it with higher-level supervisors, etc.) are recommended or required by your company's customer-relations policies. If you must close an alert without resolving the problem, see item 4, below.

4. A customer problem can't be resolved. What do I do now?

Follow company policy.

For the most part, what you should do depends on your company's customer-relations policies. Your actions should *always* be in line with your company's policies and approved practices.

Closing an unresolved alert.

If you need to close an alert involving an unresolved problem or an uncooperative customer, you can:

1. Make an entry in the diary on that customer's ISR page using the text entry box at the top of the diary section.
2. Describe the situation in a clear, concise, and impartial manner.
3. When you are done, click on the Add diary record button.
4. After you have made an entry in the diary, you can click on the Close Alert button to close the alert.

Remember that all entries in the diary are permanent, and cannot be edited or deleted.

Note that you can close an alert without making a diary entry or sending any email messages to the customer, but if you do this, the system will warn you (in the body of the Alert Closed message) that you are closing the alert improperly, and it will be visible to higher-level managers as an improperly closed alert.

Also note that under *all* circumstances, your district manager and possibly higher-level managers will be notified when you close an alert, and **they have the ability to reopen the alert if they do not think that it was adequately resolved.**

I'm a regional manager. What should I do about alerts?

Most of the time, you can let the Store Manager handle them.

If the store managers handle alerts promptly, effectively, and in keeping with company policies, you probably won't need to do anything. The ALR system is designed to make it easy for store managers to take care of alerts at the local level.

But keep an eye on the situation - automatically...

You will, however, probably want to keep an eye on the process, and the ALR system makes that easy, as well. You company's ALR system administrator can set up your account so that you are notified by email when the system issues a new alert, when an alert becomes overdue, or when an alert is closed.

...or directly...

You can also monitor the status of an alert directly, by logging onto the ALR system and going to the Individual Survey Results page for the customer who is the subject of an alert. There, you can read the diary of the alert, which will tell you what actions have been taken by the Store Manager, other managers, and the ALR system with regard to the alert.

...and be on the lookout for red asterisks * - they can be a sign of trouble.

Check the Alerts pages on a regular basis, and if you see a red asterisk next to an alert, click on the Details link to find out what's going on. A red asterisk means that a Store Manager closed the alert improperly -- without posting in the diary or sending an email message to the customer. And *that* can mean a customer-relations problem that was not handled well, or not handled at all.

And when intervention is necessary...

If you need to intervene directly in an alert, you can use the Initial Email, Follow-Up Email, and Close Alert buttons on the ISR page to contact the customer or close the alert. You can also reopen an alert by clicking on the Open Alert link on any of the alert pages which list that alert (see Chapter 4: The Retain Tab and Alerts Pages).

The quickest and most effective way to intervene is often to post a message to the diary on the Customer's Individual Survey Response page. When you do this, all lower-level managers who have responsibility for the store in question will receive email messages directing them to the diary, with a link to the ISR page. This automatically brings in everyone who is in the chain of responsibility for the store -- and it makes it almost impossible for anyone to ignore your concern over the problem!