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.

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 %

(Tabs: HEAT MAP | ASK | LISTEN | RETAIN)

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:

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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!
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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:
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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.
:
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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