



**SERVICE  
POINT**  
CUSTOMER SERVICE –  
CLIENTS &  
PROSPECTS

## Manage and record interactions with your clients and prospects from one single system

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### Overview - what is it?

**Templa CMS Customer Service** is a Customer Relationship Management (CRM) system that includes both Client Help Desk and Sales Management facilities, all integrated to your **Templa CMS Core System**, the hub for managing all your cleaning contracts.

### How does it work for existing clients?

**CMS Customer Service** allows your administration teams to deliver improved client service with an advanced Client Helpdesk facility for queries and complaints. It additionally gives all your staff, whether in admin, finance, HR or operations, an up-to-the-minute, 360 degree view of all client activity, ensuring that any interaction between a member of your staff and a client is well-informed, based on up to date information about the client and therefore more effective. The client is reassured that the left hand knows what the right hand is doing.

### Helpdesk

The **CMS Customer Service** Client Help Desk facility is fully integrated to your **Templa CMS** administration system, allowing queries and complaints to be logged as **Service Requests** and then assigned to appropriate staff as **Action Requests** and tracked through to successful resolution.

**Action Requests** are disseminated through the **CMS Workflow** module to the relevant employees, clients or suppliers using email or MS-Word document templates. **CMS Workflow** is a feature unique in the industry that facilitates the electronic tracking and sign-off of a variety of transactions. **Service Requests** are categorised in several ways including type, urgency, assignee and completion date. Through the **Action Manager**, they are tracked using a traffic light system and management can be alerted to delays in completion via an automated escalation process.

Your customers can now contact you sure in the knowledge that their query will not get lost in the system. You have removed a major source of frustration in one stroke and can throw away all those spreadsheets.



**TEMPLACMS**

Fully integrated management software for cleaning contractors

## More effective client interaction

If your clients are increasingly demanding to know the facts and figures of their cleaning contract with you – whether it be to do with staff training records, risk assessments, cleaning specifications, billing information or staff eligibility to work – then you are more likely to impress them if both your head office and field management teams can readily lay their hands on contract information.

**CMS Customer Service** benefits you here by providing staff with easy, controlled access to contract information, either in the office or out in the field via laptops or tablets. In the same way that office staff manning the Client Helpdesk can use the system to set up requests for activity in response to clients who call in, so can field management use **CMS Customer Service** to initiate **Service Requests** or append **Notes** to contract records from their home offices or client locations. Clients are reassured that not only is relevant information to hand during meetings, but that prompt actions can be taken to address issues.

## New business development

**CMS Customer Service** can be used to build and update a database of prospects or sales pipeline. Once a prospect record has been created on the system, your sales managers or telemarketers can perform a variety of useful sales development tasks including:

- Use internal **Service Requests** to schedule calls, visits or follow-up activity
- Create a quotation or proposal using the **Quote Builder** and **Cost Control Sheet** templates
- Use the report building tool to generate sales pipeline reports showing sales activity and value at any level within the company, for example by territory or geography

Once quotations are accepted, prospects can become customers at the touch of a button and information can be automatically transferred to the contracts administration system to set up new contract details.

## Why CMS Customer Service?

By keeping accurate records of contact with clients or prospects and providing complete visibility of client or prospect interaction, it ensures that your clients' queries never fall between the cracks and that your sales opportunities are not missed or forgotten.