

## SERVICE POINT

CUSTOMER SERVICE –  
COMPANY STAFF

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

## Overview - what is it?

**Templa CMS Customer Service** combines a Customer Relationship Management (CRM) system with a Help Desk and self-service administration facility for your office and field based teams, all integrated to your **Templa CMS Core System**, the hub for managing all your cleaning contracts.

## How does it work?

Using the **Address Book**, it gives staff electronic access (in line with company-defined authorisation protocols) to any record held on your system relating to your employees, clients, suppliers and their contacts. These can be either existing records from the integrated accounts and payroll databases, or prospect records maintained directly within the **Templa CMS** database. Once in the system, staff may:

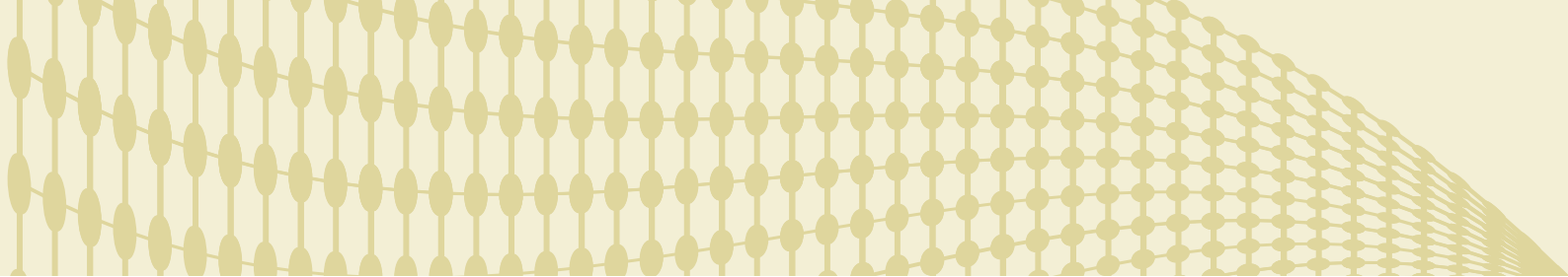
- View records for information purposes and locate them quickly using filter and search criteria
- Update any record they are authorised to access, for example to progress a help desk problem or a quality audit fault
- Add **Notes** 'on-the-fly' to confirm client, employee, supplier or contact interactions
- Communicate with contacts using integrated email or MS-Word templates, generating and automatically storing away the communications behind each record for future reference
- Manage other contract communications or information by simply clicking and dragging externally generated emails, documents and any other PC file to the record
- Complete intelligent **Forms** to support common business procedures, each of which can be sent for authorisation, if required, via the **CMS Workflow** module, a feature unique in the industry that facilitates the electronic tracking and sign-off of a variety of transactions

**Forms** cover activities such as training records, cleaning specifications, risk assessments, method statements, stores orders, work bills, new equipment requests and PAT test requests – in other words the procedures that are constantly in use in a busy cleaning company. To save reinventing standard requirements **CMS Customer Service** uses its intelligent **Forms**



# TEMPLACMS

Fully integrated management software for cleaning contractors



**Management** facility to pre-populate **Forms** with information already held on the system. For example pre-approved cleaning materials will appear when completing a stores order for an existing contract or, when a new contract is tendered or goes live, standard cleaning specification 'building blocks' for particular accommodation types, or standard risk assessments and COSHH sheets for particular cleaning tasks can be drawn from templates and assembled on screen to speed up the process.

Through its **Forms and Documents Manager, CMS Customer Service** can group and analyse **Forms** and **Documents** by type and by different level within the company hierarchy. For example:

- Training records for staff at an individual site could be grouped and disseminated to an electronic **Client Site Binder** (a requirement for all contracts) along with the cleaning specification, risk assessments and Health and Safety Policy
- Training items on the form could be collated as a skills matrix for reporting and interrogation purposes, for example a list of qualified floor buffers
- All mechanical equipment due for a PAT test in a particular month could be viewed and emailed to a contractor for action

Finally, staff may use **CMS Customer Service** to raise **Service Requests** on colleagues for action to be taken in respect of any client, employee or supplier. This can either be in response to external demands (for example client help desk queries), or in order to carry out routine internal business procedures such as submitting a form for sign-off (for example a request for a new piece of equipment). **Service Requests** can generate one or more **Action Requests** which are disseminated using the **CMS Workflow** module to employees, clients and suppliers using email or MS-Word document templates. **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. Staff may use their **Action Manager** to follow up on their own or other staff's outstanding actions

## Why CMS Customer Service?

**CMS Customer Service** is the key to your electronic filing cabinet of clients, employees, suppliers and prospects, complete with a built-in system for updating the contents, initiating and tracking requests for activity and communicating the details to the right people within your organisation.

It relieves the pressure on your sales and admin teams' time in manually transferring data from one storage location to another and in printing off documents to be placed on contract files. It saves your operations team time wasted on office visits, phone calls and emails.

It is the way to ensure important tasks get done, at speed, and with the minimum of fuss or assistance from others. Used in conjunction with the **Templa CMS Core System** it is a major step on your journey to a more efficient and ultimately paperless office.