



# ST SYNERGY

# CLIENT CONTROL CENTRE

## TECHNICAL WHITE PAPER

### Total Customer Management is just the beginning

ST Synergy set out to radically change the environment for customer management – with the view that as every component of the customer relationship leads on to other information avenues, every one of these avenues need to be viewable, manageable and controlled both directly and on a task-specific level.

The ST Synergy *Client Control Centre* is the epitome of this vision; this white paper discusses the architecture of the *Client Control Centre* (CCC) and how it benefits your organisation.

Changing the customer management story requires a quantum leap in software, database and productivity standards. ST Synergy delivers this new information volume by:

- Creating a new standard in integrated information collection
- Allowing customer based document, contact, workflow, profiling and messaging information to be available from a single interface.
- Working to the principle that data capture elements of customer management should be configurable by users for their specific requirements
- Ensuring that the customer management story returns a high degree of information productivity and increases revenues and profitability

*ST Synergy's customer management model delivers to organisations the tool set that allows them to achieve true information integration across the entire business information spectrum.*

## The customer management compass

Customer management is all about knowing – information is knowledge and knowledge is only powerful if it can be harnessed and controlled. As the heart of the ST Synergy customer management solution, the *Client Control Centre* provides central navigational control for every aspect of the customer relationship spectrum.

Not only is key customer information made available at your fingertips, the *Client Control Centre* also allows the user to navigate quickly to the following:

- document based information
- profile (demographic) data
- important anniversary information (warranty expiration dates etc)
- associations with other clients in the database
- task/job/workflow information in relation to a particular client
- contact information

Imagine if you could ensure that each and every member of your staff was empowered by the information necessary to make your customers feel valued and important. In order for this concept to become a reality, every item of information in relation to that client must be visible to your staff. Only then can they make the interaction between the customer and your organisation a positive experience that will allow them to sell, service, respond and enhance the relationship.

ST Synergy's *Client Control Centre* gives your staff and your organisation this ability to work with and enhance customer relationships unlike any other customer management tool available today.

## Travelling the customer information highway

Consider the typical information problems in an enterprise:

- You need to know what documents revolve around the customer – including every item of incoming (scanned) and outgoing correspondence as well as customer memos and reports.
- You need to know at a glance the whereabouts of customer's job details – to the level of identifying which elements of a given task have been completed and who is responsible for a specific function.
- You need to be able to profile a particular customer as belonging to a particular sales opportunity or demographic – according to your business needs
- You need to see every contact/communication your organisation has had with that customer
- You require information about the customer's relationship with others – e.g. is the customer the CEO of another company in your database.
- You need to be confident that your line of business applications (word processors, CAD, spreadsheet software etc) will work transparently with that customer information.

Key customer information is just the beginning – the *Client Control Centre* not only integrates information, it also integrates the functionality of your desktop applications & task management.

Imagine being able to see every document ever created for a client – know what was in progress and who is responsible for it, and whether a document has been sent or still in the mailing room.

ST Synergy delivers you the roadmap to this complex customer management information highway – and the sections below outline the major aspects of the *Client Control Centre* that provide you with detailed customer management information at your fingertips.

## Specific aspects of the *Client Control Centre*

### Document management

The documents tab allows you to filter the list of Documents for a Client in various ways. For example, you can see at a glance documents that are in progress at any given time, or all documents that have been completed, or sent out (dispatched), or that are completed and awaiting dispatch etc.

These documents can be almost any electronic file type – including TIF scanned images, Microsoft Office documents (Word, Excel etc), CAD documents etc.

### Filing functionality

ST Synergy automatically files documents at a document server location for you, taking care of naming, and sharing the file amongst everyone in the company. Naturally appropriate security restrictions allow you to define who can see the contents of sensitive documents.

Once stored, ST Synergy allows you to simply click on a document title and launch the document with the software taking care of knowing where to retrieve the file from and even which host application is required to launch it. With ST Synergy you work with documents on a logical level, leaving the software to take care of electronic filing and application launching.

## Incoming mail

ST Synergy allows you to automatically import scanned documents – either individually or in bulk – and these documents can be routed to users for their attention, logically filed and cross referenced to particular clients.

From the documents tab of the *Client Control Centre*, not only do you see documents that have been created for the client – you can also see and quickly preview all incoming mail or other scanned documents. ST Synergy supports the leading file formats for scanned documents including TIFF, PDF, JPG etc – allowing quick integration with your scanning hardware, leading to a true paperless office solution.

## Setting demographics and anniversaries

Using the housekeeping features of the application, your ST Synergy Administrator can define the profile(demographic) and follow-up date (significant milestone) information that you wish to capture against your customers.

Once housekeeping configuration is complete the *Client Control Centre* then allows your ST Synergy users to capture profile(demographic) and follow-up date (significant milestone) information for each of your customers. You can set follow-up dates such as anniversaries, warranty expirations etc for a particular customer and nominate a member of your staff who will be assigned responsibility for following up on the event.

With ST Synergy you can enhance your customer relationships by ensuring that someone in your organisation always knows when to act on a particular event for a customer, and record that interaction automatically.

## The multi-dimensional customer

Customers do not often exist in a single dimensional relationship – and the *Client Control Centre* allows you to define multi-level relationships between customers.

For example, you may deal with a particular company (represented as a customer in ST Synergy), however you also interact with the company's officers (its CEOs, directors etc). Using ST Synergy, you can create a multi-dimensional model of a client's relationship with others in the database.

Use the *Client Control Centre* to track which person is the CEO, director, purchasing officer etc and also which companies are related to other companies etc. You can even track multiple relationships in the event that one person has the same relationship to a number of others (e.g. in the case where one person happens to be the CEO of a number of organisations).

## Control customer workflow

Customer management is not only about tracking documents and marketing information – you also need to track and locate the lifeblood of your business – jobs.

Job / task management in ST Synergy is an extremely powerful tool that amongst other things allows you to quickly locate, track, monitor and delegate every job that is in your system. Jobs can be multi-level and comprised of a series of tasks at each level, with individual approval and delegation occurring at each waypoint.

Now when your customers call you to find out where their job is – you have the ability to locate and report on the position and status of every job or even components of a job.

## Communications management

ST Synergy's *Client Control Centre* embodies a powerful contacts management system that allows you to track and record every communication (such as telephone calls) made with a particular customer. This contact history is based on topics that you define for your business, and allows you to see who made the contact and which person was contacted.

The contacts system can be tailored to act as a general contacts system, a quality control system (for monitoring quality control reviews etc) or even as a help desk environment – it simply depends on your usage requirements.

## Summary

The ST Synergy customer management model is truly all encompassing and delivers a unified solution that bridges desktop applications, contacts, document, workflow and messaging to deliver the one-stop information base that is vital in managing today's customer relationships.

The table below outlines a cross section of the ST Synergy *Client Control Centre* – with major applications and tabs defined for ease of reference.

Component	Use	Typical application
General tab	Allows quick view of customer address, email, notes and web information	Marketing/Customer relationships
Documents tab	See every document relating to the client from a work-in-progress, completed, incoming (scanned) perspective etc	Document Management
Profiles tab	Set demographic information for customers as well as defining important business/personal anniversaries (warranty dates etc). Assign responsibility for monitoring significant date events to particular users	Marketing/Customer event management
Associates tab	Define multi-dimensional relationships between clients. See how a client is related to another etc.	Marketing/Customer relationships
Referrals tab	See which customers have been referred to us by a particular customer – and track those customers that have in turn referred the customer to us.	Marketing/Customer relationships
Archives tab	Manage all physical paper records for a customer – define what records are stored for a client, their contents and location.	Records management
Matters tab	Track, locate and maintain a history of what tasks/jobs are in progress for a particular client at any given point in time. Define approval steps, delegate tasks and track current and completed tasks with ease.	Workflow management
Communications tab	Complete contacts management – define contact subjects, see which person in your organisation made the contact and with whom. Track dates, times and other information regarding each contact made.	Contacts management/Marketing
Messages tab	Track every Email\Fax\SMS message regarding a customer.	Customer relationships
Diary tab	View all appointments scheduled and conducted with Clients	Marketing/Customer relationships

Table. Main Cross section of ST Synergy Client Control Centre button