Best Practices: Customer Service

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AGENDA

- **General Customer Service Expectations**

- **Client Communication Expectations**

- **Outreach Process & Expectations**

- **Standard Protocols**
  - **Phone Call Follow-Up**
  - **Closing Cases due to No Response**

Presented by:
Justice Dove

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General Customer Service Expectations

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General Customer Service Expectations

5 expectations to remember

1. Log **all** calls/emails on Salesforce
2. Avoid "No problem" or "You're Welcome"
   - ❖ Use "My pleasure" or "Thank you"
3. Do NOT make promises or speak in definitive/absolutes
4. Do NOT speak for others' time
5. Customer Service is our # 1 focus

All calls and emails, including non-support calls, are **required** to be logged on Salesforce

- True
- False

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Client Communication Expectations

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Client Communication Expectations

Responding to Clients

- Our average response time is within 2 hours of receiving cases
- Not necessary to resolve the case within 2 hours, but acknowledge that you have received it and that you're looking into it

CASE NUMBER	ACRONYM	CONTACT NAME	SUBJECT (NO PHI)	STATUS	DATE/TIME OPENED	LAST MODIFIED DATE/TIME
00533305			EUC Application	Open, Pending Customer Response	8/10/2020 8:34 AM	8/10/2020 10:20 AM

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Client Communication Expectations
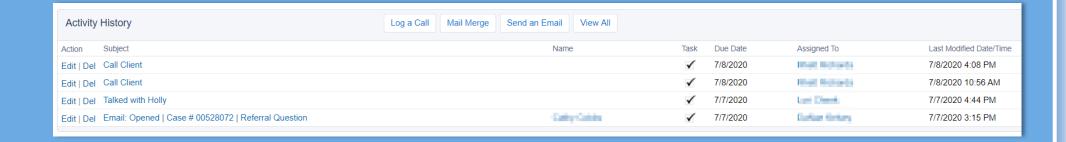
Responding to Clients

- Always provide clear next steps
- Always provide a timeline for Updates/Actions items

- **Action Required:**
  - ○ Please have each provider review their denominator values for each measure and confirm that they are accurate
  - ○ Once this is completed, please send an email confirming that the final reports are accurate

Thank you for opening a ticket with the help desk! I would be happy to assist you with looking at these patient examples for eCQM 143. I will follow up with you tomorrow when I have an update for you.

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Client Communication Expectations

Responding to Clients

- At a minimum, we should have weekly updates for clients

Subject	Case # 00567893	HQM Reporting

Good morning Jill,

I hope you are having a great day. I wanted to follow up with you and let you know that I am still looking into your HQM Reporting issue. I will continue to keep you updated as I have more information.

Thank you,
Justice

Subject	Case # 00567893	HQM Reporting

Good morning Jill,

I hope you are having a great day. I wanted to follow up with you and let you know that development is continuing to work on the HQM issue. I will provide another update **Tuesday, August 18, 2020 by EOD**.
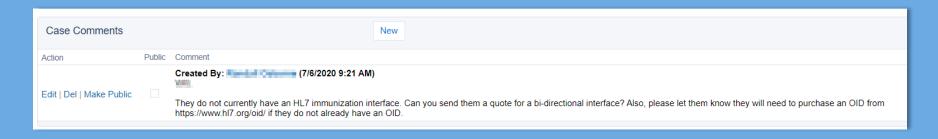
Thank you,
Justice

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Client Communication Expectations

Responding to Clients

- Documentation of contact attempts
  - ❖ All recap emails attached to Salesforce

	Activity History							
		Log a Call	Mail Merge	Send an Email	View All			
Action	Subject			Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit | Del	Call Client				✔	7/8/2020		7/8/2020 4:08 PM
Edit | Del	Call Client				✔	7/8/2020		7/8/2020 10:56 AM
Edit | Del	Talked with Holly				✔	7/7/2020		7/7/2020 4:44 PM
Edit | Del	Email: Opened | Case # 00528072 | Referral Question				✔	7/7/2020		7/7/2020 3:15 PM

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Client Communication Expectations

Responding to Clients

- Documentation of case comments
  - ❖ Comments should be free of grammatical errors
  - ❖ Written so other teammates can understand the case
  - ❖ As we work on transitioning clients to community, all resolutions and comments marked public will be visible

Case Comments		New
Action	Public	Comment
		Created By: ██████████ (7/6/2020 9:21 AM)
Edit | Del | Make Public	☐	They do not currently have an HL7 immunization interface. Can you send them a quote for a bi-directional interface? Also, please let them know they will need to purchase an OID from https://www.hl7.org/oid/ if they do not already have an OID.

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Client Communication Expectations

Responding to Clients

- Documentation of resolution for requests/cases/projects
    - ❖ Include what was done/how it was done
    - ❖ This could be the last email sent to client

Resolution (No PHI)	Met with TempDev to install updated report for I██ to show all orders, outstanding and completed. Received confirmation from Sara that she was able to run report and everything looks good. OK to close case now.

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What is the average response time for salesforce cases?

- 1 hour
- 2 hours
- When you have the answer
- By the end of the day

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Outreach Process & Expectations

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Outreach Process & Expectations

Outreach to Clients

- Outreach to clients can be via email and/or phone calls
  - ❖ If you leave a voicemail, you must also send an email saying you attempted to call but left a voicemail
  - ❖ All outreach and call documentation should be in the same email chain and attached to case or project in Salesforce
- 3 Attempts to try and reach clients
  - ❖ At least one of these attempts should be a phone call

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How many attempts to contact a client has to be via phone call

- None, all attempts can be completed via email

- 1 attempt, which has to be followed up by a recap email

- All attempts have to be via phone call

- None of the above

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Phone Call Follow-Up

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Phone Call Follow-Up

Outreach to Clients: Phone Call Follow Up

- Follow-up email should be sent after **all** client calls
  - ❖ Case communication, trainings, call reschedules, etc.

- Email should contain a full recap of the conversation and any next steps/action items for you and/or the client
  - ❖ The documentation should be in the same email chain as any previous communication regarding the subject of the call
  - ❖ Attach to case or project in Salesforce

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All email communication, that pertains to a specific case, has to be documented in the same email chain

- True
- False

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Standard close issue – NO Response

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Standard close issue – NO Response

Outreach to Clients

- At least 3 outreach attempts regarding an open support ticket have gone unanswered
  - ❖ These attempts should be a combination of both phone calls (including voicemail) and email
  - ❖ All outreach attempts should have written documentation and be in the same email chain

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Standard close issue – NO Response

Outreach to Clients

- Final email (4th email) is sent, it should be attached to the open support ticket, which can then be closed with the resolution "Closed, No Response"

Hello {Client Name},

I hope that you're doing well! I'm reaching out today in regards to your {brief description of ticket} support ticket that was opened on {date}. We have attempted to get in touch with you over the last {timeframe}, but unfortunately have not received a response. Outreach attempts were completed on [date 1, date 2, and date 3]. Since we have not heard back, we will be closing this support ticket, however if you still require assistance with this issue please let me know by responding to this email or by opening a new support ticket via helpdesk@tsihealthcare.com.

Thank you,
{Your Name}

RECAP

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