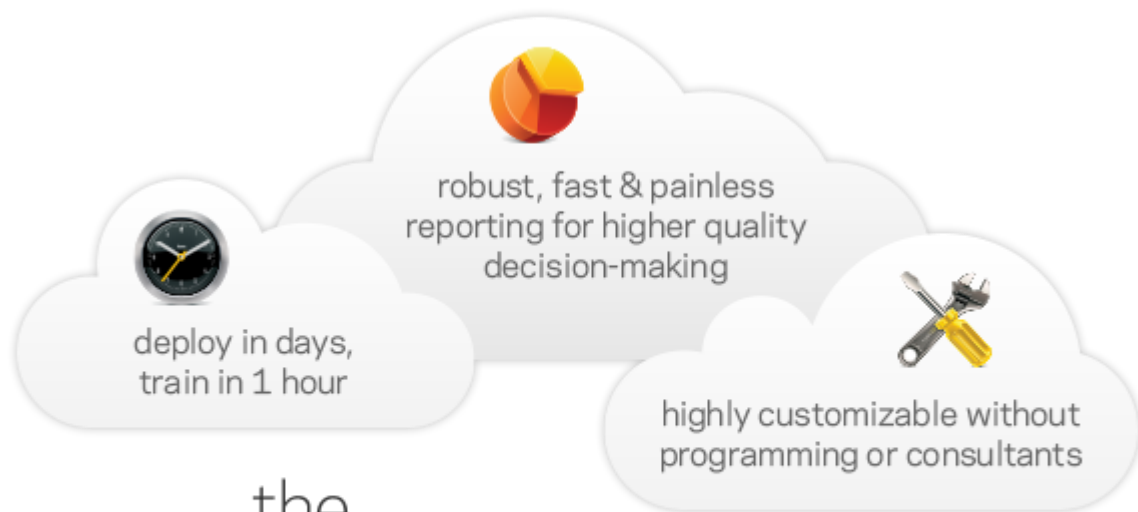


- + DEPLOY IN DAYS / TRAIN IN 1 HOUR
- + HIGHLY CUSTOMIZABLE WITHOUT PROGRAMMING OR CONSULTANTS
- + ROBUST, FAST & PAINLESS REPORTING FOR HIGHER QUALITY DECISION-MAKING

QUICKSTART GUIDE

eCustomerService



the
Giva difference

Seven Easy Steps to Getting Up and Running in a Week

Giva provides you with pre-deployment worksheets that can be used to document your thinking process as you go through the set-up. We also provide you with default settings for all required fields. You can use these default settings as a starting point to get up and running fast.

1. Define customer companies

“Customer Companies” are all of the companies that may request service from your Customer Support Department. Each “Customer Company” can easily be configured exactly alike or with specific unique configurations. For example, each may be configured with company and individual contact information, the products/services that the customer is using, support entitlements, serial numbers, VIP status, warranty period, etc. All of these custom fields are easy to quickly set up, with point and click steps. No coding or scripting is required.

2. Define service groups

These are the various departments that contribute to distinct aspects of customer support, such as the Sales or Technical Service Groups. Your Customer Support Department should be the focal point for all customers to call for their problems/service requests. Outsourced service groups and/or other company departments can also be set up as Service Groups. For example, two company departments outside of Customer Support are Marketing and Finance. Handling some customer service requests may require the coordination between the Customer Support, Marketing and Finance departments. As a result, these Service Groups may be logical choices. Within each Service Group, you also have the option to set escalations paths for each Severity Level. For example, you probably want the escalation path for the Marketing Service Group to be different than for the Finance Service Group.

3. Define nature of requests

A nature of request (NOR) is a predefined service request classification that defines the type of service request and is associated with a service group. For example, a typical NOR for a Technical Service Group might be “Error Message xyz.” We suggest that you first discuss with each service group manager the typical requests that the group

receives from the Customer Support Department. When Giva reports are used in conjunction with NORs, this yields a very valuable understanding of where customer support time is spent.

As an option, you can also set-up a series of questions that will pop up in the browser of the user when the related NOR is selected when opening a new service request. This will remind the person handling the call to ask the customer specific questions. There is also a data entry box available to input the answer. These answers are then captured into the service request description. Pre-defined questions help to make any new customer support agent become proficient more quickly. They also provide consistency in documenting service requests. This is a process that the second-level customer support agents will greatly appreciate.

4. Define severity levels

A Severity Level is an urgency rating given to each service request and it is based on the effect of the issue on the customer and the support contract purchased by the customer. The severity level is then used to set the priorities with which service requests are managed. As an option, respond and resolve times (service level agreements) can be associated with each severity level. Even if service level agreements are not announced to your customers, but are simply used to set goals by the Customer Support Department and other service groups, they will dramatically improve the quality and level of service provided to your customers.

Also as an option, you can set up default severity levels and service level agreements and associate them with each NOR. You can also set up default severity levels and service level agreements and associate them with each customer’s profile. These options will automatically complete the severity level and service level agreement fields based upon either the NOR selected or the customer’s profile.

5. Add users

“Users” are those people who will actually receive, work on, modify and resolve service requests using Giva eCustomerService. The only differences between adding a “user” and a “customer” are indicating the appropriate service group(s) membership, notification methods and report privileges. These people can be imported via spreadsheet or Giva API.

6. Add customers

“Customers” are all the people and companies that may request service from your Customer Support Department. “Customers” can be imported via batch mode into Giva’s database to get your company up and running fast. We have found that all of our customers are typically able to export the minimum required fields of information which are company name, first name, last name, email address, and phone number. from their current database of customers. Only 5 fields are required to get up and running on Giva. These people can be imported via spreadsheet or Giva API.

7. Configure eCustomerService options

eCustomerService makes configuration easy.

Define company options

This is where the administrator can enable or disable some of the features in eCustomerService or configure the way that they are presented. There are many company options that provide a range of flexibility.

Other options:

Define root causes field

A root cause is the most basic reason for an undesirable condition or problem, which if eliminated or corrected, would prevent the problem from existing or occurring. “Best of breed” customer support organizations religiously categorize every service request so that they can

routinely analyze why requests occur so that processes, procedures or technology can be changed or implemented to reduce these kinds of requests.

Define submit methods field

Submit methods are the various ways that you permit customers to contact the Service Desk, such as by e-mail, phone, web site, Facebook, fax, text, Twitter, etc.

Define quick tickets

Quick Tickets allow you to quickly create a pre-defined ticket template for requests that occur frequently, such as “How-To Questions.” By creating a Quick Ticket, agents will be able to rapidly create new tickets without having to complete all fields in the ticket. You can also manage e-mail-to-ticket and web-to-ticket conversion with Quick Tickets.

Customize notifications

This feature allows you to customize various e-mail notifications that are sent to customers and/or users. Most ticket notifications are completely configurable. You can also manage the ticket fields that are included in mobile alert notifications by selecting only the most relevant fields.

Customize surveys

Surveys are a best-practices way of giving feedback to your organization so you can continue to provide excellent support. The sending of surveys and the surveys themselves can be customized to fit your business needs.

This is all that it takes to set up Giva eCustomerService! By planning ahead and using our easy pre-deployment set-up worksheets, you can be ready to take customer requests in a few days.

Productivity Advantages of eCustomerService

eCustomerService is easier to use

Customers tell us that eCustomerService's ease-of-use is its most compelling feature. In fact, Giva has trained our customers to become fully functional with eCustomerService in a single hour session. It is 100% web-based and architected from the ground up as a web-based application. Our applications, tools and reports are based upon common web navigation metaphors, drastically reducing training time. This ease-of-use includes accomplishing functions with simple point-and-click steps and the use of familiar icons.

Giva Easy Two-Click ReportingSM displays results against goals

Giva has developed our own reporting engine that we call Easy Two-Click Reporting. "Click, click" is all that is required to generate reports with useful information and insights into your customers' service requests. After your first click, you have KPIs, charts and metrics, and with another click can name, share or download the report. If desired, you can also quickly build your own reports from scratch with our report builder templates. With the information available from our reports, our customers know why calls occur and have been able to take the steps necessary to reduce the overall call volume. As a result, they have lowered their costs and increased customer satisfaction. In addition, our customers can download their data any time into an Excel file or PDF format and easily perform additional analysis.

Reports

Giva eCustomerService also features more than 80 predefined reports, including:

My Tickets

- My Open Tickets
- My Created Tickets - Open & Closed
- My Created and Open Tickets

Open Tickets

- All Open Tickets
- All Open Tickets - Hours Open
- Open Tickets - Date Range
- All Open Aging
- Open Tickets - On Hold

Unassigned

- Unassigned Tickets by Creator
- Ticket Distribution - Assigned & Unassigned

Category

- Nature of Request Frequency
- Nature of Request Trends
- Tickets by Nature of Request
- Nature of Request by SLA Compliance

Service Level Agreements & Breaches

- SLA Compliance
- SLA Compliance Trends
- My SLA Compliance
- Current SLA Breaches
- Service Level Agreement (SLA) Breach Statistics
- SLA Breach Trends

Customer Feedback

- Customer Satisfaction
- Customer Satisfaction Trends
- My Customer Satisfaction
- My Customer Satisfaction Trends

First Contact

- First Contact Resolution by Creator
- Ticket Activity by User
- First Contact Resolution Trends
- First Contact Resolution by Nature of Request

Advanced Analysis

- Ticket Fields
- Root Cause Trends
- Tickets by Customer Profile Fields
- Time to Open & Close Tickets - Service Desk Hours
- Time to Open & Close Tickets - Off Hours
- Submit Method Trends
- Tsunami Tickets & Major Outages
- Ticket Hours Worked by User
- Ticket Hours Worked for Customer
- Hours Worked by Cost Center Codes
- Quick Ticket Analysis
- Re-Opened Tickets
- Parent/Child Tickets
- Backdated Tickets
- Ticket Entries by User



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Cross Service Desk

- All Open Tickets
- Nature of Request by SLA Compliance
- SLA Compliance Trends
- All Open Aging
- SLA Compliance

Schedule a Demo

The best way to experience eCustomerService is to [schedule a live demo](#).

Giva Inc.

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