

WMS: Did You Know?

From Professor Merlot



Call Backs – How to track follow-up calls to customers? #28

Is it important to have returning customers? Absolutely! As a customer who knows of your business, they are an important piece in growing your business.

If there is a reason why you haven't seen them in over a year, perhaps making them aware that you consider them important; is all that is needed to have them return!

Call backs is the tracking tool that can reconnect you with these lost customers. Here's how:

A. Determine who are your Lost Customers

1. Find these customers:

- Open the form, **Customers Listing with No Orders (Date Prompt)**, (Main Switchboard/Customer Switchboard).
- This form will show all Customers who have placed orders within the last 2 years, but have not purchased anything in the last year (these values, in red, can be adjusted by you).
- Press the '!' , **Exclamation** button, to run these results.

Inactive	Customer	Address	Phone	Update Date	Cust ID
<input type="checkbox"/>	Abel, Lisa	1009 SE 22nd Terrace, Langley, BC V7W 2C7	(604) 885-8604	Apr-16-2012	1695
<input checked="" type="checkbox"/>	Abram, Linda	13501 Stratford Pl, #203, Langley, BC V6S 2K1	(604) 537-3675		1643
<input type="checkbox"/>	Craig, Terry	123 Any Street, Langley, BC V3S 7T7	(604) 555-1233	Feb-24-2006	1978
<input type="checkbox"/>	Handwich, Sam T.	16 NE 19th Court, Langley, BC V8B 1S8	(604) 537-3785	Jul-28-2012	1490
<input type="checkbox"/>	McDermid, Don	456 Other Street, Langley, BC V2K 4T4	(604) 555-1233	Mar-28-2012	1979

2. Print Active Customer with No Orders:

- Fill the **Print Preview** checkbox, and press the **Printer** button to review this listing. A sort order form will show, select “**Sort Report By**”, **Surname/First Name** for example.
- The report will be displayed, complete with **Name/Address, Phone, Last Called** date, **Customer ID**, and the **Call Comments**.
- Print this report.

Sort Report By:

City

Postal / Zip Code

Surname / First Name

E-Mail Address Option:

Include all Customers

Only Customers with email address

Only Customers without email address

Print Preview

Preview...

3. Analyze your report data:

- This report may have comments already added from previous discussions.
- Note the **ID** number, this will be your link to the **Customer ID** used in the **Customer Information** form.
- Using this **ID** number, you can double-click on it to quickly to find that customer (similar to using the Invoice Number quick find).

All Active Customers With No Orders At:
Shelley's Wine Emporium
Since July 30, 2012 for last 12 months

Name/Address	Phone	Last Called ID	Call Comments
Abel, Lisa	(604) 885-8604	01-11-2012	
1009 SE 22nd Terrace, Langley, BC V7W 2C7		1695	first call and was interesting in another referral for the following other customers. She is adamant not to call from 5-6 pm on any day.
Craig, Terry	(604) 555-1233		
123 Any Street, Langley, BC V3S 7T7		1978	
Handwich, Sam T.	(604) 537-3785		
16 NE 19th Court, Langley, BC V8B 1S8		1490	
McDermid, Don	(604) 555-1233	02-08-2012	
456 Other Street, Langley, BC V2K 4T4		1979	was away for the last year touring the latest animals in South Africa. Like to get back into wine tasting with some of the new reds that are available in the last year.
Total for Monday Jul 30, 2012 = 4			



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4. Open the Customer Information form:
 - Select the **Notes, Recipes & Call** tab.
 - Double click on the **Cust#** to open the **Find**.
 - Enter an **ID** number from the report, i.e. 1695 and press **Enter** to jump to Lisa's page.
 - You will see data entered in:
 - **Call Back (months)**
 - **Last Call Date**
 - **Call Comments**
 - If no data is entered, it is here that you make your first entry when you make contact with your 'Lost' customer.

5. Call your Customer:
 - With the '**No Orders**' report in hand, and using their contact information, call each of your listed customers to reconnect by suggesting sales or new products.
 - After discussing or leaving a message, add these details to the 3 fields in this section of the form.
 - As it is in all date fields in WMS, update the **Last Call Date** by double-clicking in this field or right-mouse click for the calendar.
 - Change the information in the **Call Comments** field to your current exchange with your customer.
 - Change the **Call Back (months)** field to the appropriate option. You can select **Never** or any other number from **1 to 12 months** as shown to the right.

6. Contact all of the Customers With No Orders:
 - Repeat step 5 with each of the listed customers from this report.



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B. Monthly Call Back Process

Once section A has been done the first time, the Monthly Call Back process will be the norm. For each customer that you call back, per their request, you need to have all of their historical information at your finger tips.

Here's where you find this information for your monthly call back sessions:

1. Rerun Section A-1 first:
 - If this is not the same day when Section A was originally run, please rerun section A, step 1 (from page 1) to repopulate the Call Back data source.

2. Open your Customer Information form:

- On the main tab of this form, fill the checkbox **Print Preview**.
- Open the Drop Down selector next to the **Printer** button and select the **Customer Call Backs** option.
- Press the **Printer** button, and a prompt will appear.
- Enter the year that you want to start the search, i.e. 2010 and press **OK**.

3. Review the Customer Call Backs report:

- As before, have this report on hand when you contact each customer.
- Having their past history, and previous comments as a valuable resource, will allow you to speak wisely to each customer about their needs and preferences.
- Having this data in front of you, prevents any embarrassing events, should the customer had indicated no future contact.

4. Update the Customer Information Call Backs:

- At conversation end, open this customer's **Notes, Recipes and Calls** tab using the **ID** number on this report as a search key to quickly access each customer.
- Now, you can revise, update and add further details to the **Call Comments** data for future calls.
- Should a customer not want to be contacted in the future, simply select **Never** in the **Call Back (months)** drop down and future Call Backs will not be included in the print out of the report.

Customer / Call Comments	Last Called	Phone / Cell	ID
Don McDermid 456 Other Street, Langley, BC V2K Call Comments: Was away for the last year touring the latest animals in South Africa. Like to get back into wine tasting with the some of the new reds that are available in the last year. 1 Mar-23-2011 IM Black Raspberry Merlot 2 Mar-23-2011 VR Chamblaise 3 Mar-23-2011 VR Gewurtztraminer 4 Mar-23-2011 VR Piesporter 5 Mar-23-2011 VR Piesporter	02-08-2012	(604) 555-1233	1979
Lisa Abel 1009 SE 22nd Terrace, Langley, BC Call Comments: first call and was interesting in another referral for the following other customers. She is adamant not to call from 5-6 pm on any day. 1 Apr-02-2011 Barons Amber Ale 2 Apr-02-2011 Sel Barolo	01-11-2012	(604) 885-8604	1695

