



Route Management Software For Those Who Want To Know

Managing Customer Calls

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Take a moment to evaluate the way your business handles customer calls on a daily basis and you could increase your company profits in a short period of time. Everyone (including your customers) knows that customer satisfaction is a key element to growing your business. The customer who does not take a delivery when your driver shows up and then calls two days later for a delivery is an expense – not a profit. When profitability decreases your first thought may be to raise prices to make ends meet, opening the door for your competitors to come in with lower prices. Few companies stop and think about the profitability of the overall sales and keeping prices lower by evaluating your routes and increasing profitability. It is possible to increase the bottom line by losing a few non-profitable customers to your competitors and maximizing both sales and service to profitable customers. The first step is to look at the way your office handles customer calls.

The one most common mistake companies seem to make is having several people in the office take calls and write the information on a piece of paper. This piece of paper can end up in a variety of places – sticky notes on someone's monitor, the desk of the route manager, a bulletin board, or someone's in-box. Without saying another word, you can all guess what happens to pieces of paper. For the most part, they go where they were supposed to go; however, sometimes they get misplaced, dropped behind a desk, accidentally thrown away, or carried away to another desk with a pile of other papers. This, of course is the worst scenario because a sale will be missed and the customer will not be happy.

Without the use of a computer to handle these calls, the best method I have seen during my 16 years in this industry is a centralized book. The book should not have removable pages and everyone should write every call-in for delivery in the book. A piece of paper may also be generated and put somewhere (as on a bulletin board), however, there is a record in the book so the route manager can check it several times a day with some degree of confidence that everyone who called is listed.

A centralized database of some sort is optimal – one that can record the call while the customer is on the telephone so nothing is lost or not completely entered due to an interruption. A spreadsheet that everyone can access is far better than relying on a piece of paper to keep up with a hectic barrage of phone calls.

Ideally, a customer who is on a route should never have to call in for an off scheduled delivery unless there is a special event or something that requires more product than normal. Unfortunately, as we all know, off schedule calls are a common occurrence in the distribution world and carry the extra expense of sending someone out in a truck to deliver a small quantity of product.

The goal is to reduce customer call-ins altogether. Every one knows that this is not possible so the goal becomes taking care of those that will make additional income for the company, and minimize all others.

Why do customers call-in for off schedule deliveries? That is the first question that should be addressed.

- The customer missed a delivery for a reason generated by the customer
 - No bottles left out or no one home
 - No one available to sign the invoice or pay the invoice
 - No instructions left for the driver
 - Store or office closed
 - Customer didn't need any
- The customer missed a delivery for a reason generated by the driver
 - Driver decided the customer did not need a delivery
 - Driver ran out of time or product
 - Driver had problems with the truck
- The customer needs more product than normal and expects to run out
- Busy weekend for retail sales – sold more product than normal
- Special event
- A residential customer is expecting company
- Other reasons a customer may be calling for deliveries
- Last delivery contained defective product
- Customer reinstating delivery schedule
- Customer is not on a regular delivery schedule

There are many variations of the above scenarios, but we want to keep track of the number of times the customer calls in for delivery, the number of times the customer has no delivery when the driver went there, and the number of times a customer has a no delivery followed within a few days by a call-in for delivery. If you are able to identify those customers who consistently miss delivery because of something in Group 1, the customer should be evaluated for profitability and steps taken to reduce these since these are the ones that cause an extra expense and possibly cause the driver to miss other stops because he runs out of time.

The person answering the telephone should be able to quickly find all of the information about the customer, including the frequency of call-ins for customers who are out of product. Depending upon who is answering the telephone, the call may be completely handled or merely sent to the call-in management area, alerting the route manager that a call has been entered and the information regarding that call. The route manager can then contact a driver who is in the area for a same day delivery, or schedule the call-in on a route for tomorrow (or whenever).

Using the GBC Advanced Routing dispatch module can help your employees make intelligent decisions when a customer calls, according to your company policy. Call-ins can also be entered for any future date such as special events that you know will happen in two or three months, or even a year from now. Each call-in can be marked complete by checking the checkbox and the driver number who took care of it so the route manager only needs to look at the call-ins that have not yet been completed.

Each call-in that has not been completed by the end of the day can be scheduled for another route and day, and would then be included when tickets are printed or sent to the handhelds. The route manager will assign a driver and delivery date to the call-in. When tickets are printed or the routes sent to the handheld, the program includes each call-in where the assigned driver has a route scheduled for the selected delivery day. The call-in will also be sent to Microsoft Mappoint with the route if the route is going to be optimized before the delivery date. The sequence number will be stored with the call-in and the call-in will be put in the appropriate place on the route when tickets are printed or routes sent to the handheld. If the route is not optimized, or a stop number not entered, the call-in will appear at the beginning of the route. The driver can then sequence the route on the handheld, putting the call-in at the appropriate place on the route.

Now that the call-in has been completed, someone can look at the customer through Customer Support and find information about the habits of this customer with GBC's powerful functions. There are several tabs on the Customer Support screen that provide information about the habits of this customer. The Call-in Tab displays a record of all call-ins for this customer. The Messages Tab displays information about customer inquiries such as a complaint, billing question, etc., or when someone from your office had to call the customer. These messages include a user defined category field. These message categories are basically reasons for a call based on your interests so you can filter data to find all driver complaints, billing questions, etc. and monitor the perception your customers have of your company and its drivers.

When a customer calls in, GBC has a Customer Summary that can provide your employees with a quick overview of the customer. An Activity Calendar can be acquired with a few clicks that will visually display the No Takes, Deliveries, Call-ins, Payments, and Future Route Schedule. This enables you to see as many months as needed to determine if this customer should have his delivery schedule adjusted, or perhaps just having a talk with the customer to explain the economics of stopping with no resulting sale, or even determining that more severe actions should be taken such as removing the equipment. Steps can now be taken to ensure that this customer is not actually costing the company money instead of creating a profit.

Once a sufficient amount of data has built up in GBC, the Custom Reports feature can provide relevant analysis. Custom Reports makes it easy to bring together tables to find answers. For example, taking the call-ins, customers, and routes together can provide a count of how many call-ins are generated by the routes belonging to a given driver. By looking at the date of no-takes and call-ins, and bringing in the type of the no-take, GBC can show you how many call-ins were the result of something the customer did (as in a refusal for ice companies or no bottles left out for water companies), or something the driver did (as in ran out of time or product).

In any distribution business it makes sense to monitor your routes and driver activity since this is undoubtedly the major cost involved in your business. Many companies ignore this important analysis merely because they have enough cash flow to pay the bills or don't have the information easily available. Routes should be monitored for average quantities delivered per stop, average number of stops per route, average dollars per stop, number and type of no takes generated per driver and/or route, gross profit per route, and accounts receivable per route. Attention can then be given to the proper routes until all are in the acceptable range. Whether you have 3, 25, or 50 routes, without this information, you could be losing profitable sales to unprofitable sales.