

# DOCSVAULT WhitePaper

## Document Management Software for Customer Service

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## Overview

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Customers today want everything immediately. Companies cannot afford to be negligent or slow in this fast-paced world of business. One of the greatest help for companies to survive in this situation is technology. Most companies have automated their processes to improve organization, reduce interdependency between employees and increase productivity at workplace, so as to serve their customers better.

This whitepaper deals with the issue of customer service improvement with the help of document management software.

### ***Why document management?***

Document management helps in following ways:

- ✓ Keeps customer records safe
- ✓ Easy access to records through shared repository
- ✓ Faster customer query handling
- ✓ Prepares for e-discovery requests

**In today's fast-paced world, customers don't wait for anybody, a little negligence and your customers will go to the competitor.**



One of the most important aspects of running business smoothly is good customer service. There's no exaggeration in stating, 'customer is the king.' After potential customers make the first contact, it becomes the company's responsibility to make them happy and turn them into loyal customers. However, for this to happen, companies need to be well-organized and have a structured workflow system, so that all employees are aware of their duties. Document management system can prove to be an excellent tool for customer service department in this regard.

Many companies have given up manual filing of paper documents and physical records system and save documents related to customers such as forms, contracts, agreements, etc. only in electronic format. However, the problem is not solved here. Due to lack of document storage policy, most of these documents are stored haphazardly and when a customer calls, one does not readily know where to find these documents. Loss of documents can not only lead to loss of customers and business, but also loss of reputation. That is why, it is very important for companies to invest in document management system (DMS) and keep their records safe. DMS also helps manage workflow efficiently, so one can act promptly on customer demands. In order to survive today's cut throat competition, DMS is a must.

## Ad-hoc Document Management

*Documents received by fax, courier or email are often stored arbitrarily in different locations leading to loss of documents. These documents are not easily accessible and the staff has a hard time finding customers' documents. All these result in mismanaged documents, leading to poor customer service.*

## Key Challenges

- Poor use of technology
- Unsystematic workflow system
- Lack of document management system
- Slow response time
- Poor collaboration

The duties of customer service department encompass a variety of responsibilities such as customer satisfaction, prompt response to customer queries, friendly attitude when confronted with customer complaints and effective follow up. Successful businesses always list great customer service as the reason of their success. However, most companies are not able to do this successfully. There are many reasons that act as a hindrance to good customer service. The problem may lie in the way the customer information is organized or dispersed or in the way the customers are treated by employees. While the latter needs to be dealt with serious training and development, the former can be solved through effective document management policy. Let us understand the key challenges faced by companies in serving their customers effectively.

- **Poor use of technology**

While most companies are quick to adopt technologies, employees are very slow to implement them. Despite investing in expensive technologies, most people are not aware of how they can use it more effectively. For instance, faxes, scanners and other machines have accelerated the information sharing processes but employees can't make the best use of them because they don't have a centralized repository to organize scanned batches neatly and as a result information is lost.

- **Unsystematic workflow system**

Poorly organized environments have an even poor workflow system. Most employees don't know the status of a task, many hours are wasted on working on the same task and there is zero communication between them. While things are easily manageable in a small team, troubles may start brewing as the company grows. Unsystematic workflow can not only cost a lot of man hours but also financial losses.

- **Lack of document management system**

One of the most important assets to serve customers is to be ready with a solution, always. *Customer calls to inquire about Product code 1004098 – it's right here. Customer wants to speak to the representative she spoke to last time – not a problem. The details of representatives are saved in customer folder notes.* Only document management solution can help you to be ready with answers and solutions always.

- **Slow response time**

Many research studies have shown that employees waste one third of their time looking for information. And when it comes to customers, customer delayed is customer lost. Slow response time is one of the most damaging problems for any company.

## Important tools for customer service

*Any tools that help in organizing, retrieving and sharing information help customer service department to collaborate and communicate with customers more effectively. These tools make the customer service department better equipped to solve customer queries on time, improve follow up and speed up mundane storing and filing jobs.*

## Must-have features

- Management tools for organizing information
- Sharing tools to collaborate within and outside organization
- Communication and workflow tools to improve efficiency of customer service representatives

Docsvault offers two document management editions - Docsvault Small Business and Docsvault Enterprise. While the SB edition offers full range of document management software, Enterprise edition combines benefits of record management and web access along with document management. Let us briefly have a look at all the tools that can help companies improve their customer service.

### Document Management tools

- Integrated scanning to speed up complex scanning jobs
- Centralized repository with multiple import options
- MS Office Integration to quickly save and edit Office files

### Critical Retrieval Tools

- Document profiling and notes for quick retrieval
- Document versioning and relations to find the right documents
- Quick search options to find documents in no time

### Fine-grained Security for Documents

- User / Group based security to keep customer documents safe
- Document export prevention to prevent data theft and leakage

### Collaboration and communication features

- Simple workflow management with features like document routing and task flow
- Document notes and task notes to communicate briefly
- Email alerts and notifications to ensure timely follow up
- Public shared links to simplify sharing files and folders with customers
- Web access to ensure you can be ready for your customer queries 24 x 7

### Records Management

- Create different retention schedules for customer documents by defining retention periods
- Apply retention policies for both physical and digital records
- Protect customer records from accidental or deliberate deletions

## Possible Scenarios

Customer-oriented companies pull more ahead of companies that invest in heavy advertising and marketing. Satisfied customers buy more and return to buy again. The key to great customer service is to satisfy them. However, most companies can't do it successfully.

## Docsvault as a Solution

*Docsvault provides tools and solutions that ensure customers keep coming for more. It can improve productivity of employees by reducing monotonous jobs, making information readily available, speeding up regular tasks and smoothing communication and collaboration. All this cumulatively has a positive effect on customer satisfaction.*

Docsvault takes care of all your routine jobs so you can take care of you customers more effectively. Let us look at some scenarios taking place regularly while serving customers so you can understand the benefits of Docsvault clearly.

### *# Scenario 1: Customer calls for urgent inquiry and you need information instantly*

Any business dealing with customers knows that any inquiry from a customer or potential customer is always urgent and needs to be dealt with immediately. Keep customers waiting and you can lose them to competitors. Docsvault offers centralized repository so you can organize your customer documents neatly making them instantly accessible. Moreover its advanced search options allow you to locate precise information in seconds.

### *# Scenario 2: Customer follow-up pending, while everyone assumes the other is doing it*

Many a times, two or more employees in an organization are responsible for client handling. Under these circumstances, it is necessary to ensure all your employees are updated about all the changes happening concerning a particular customer. Docsvault offers simple task flow with features like task notes, quick email and reminders and notifications to ensure timely follow ups.

### *# Scenario 3: Customer documents needs to be protected and retained for regulatory compliance*

Regulatory acts such as SEC and the Gramm-Leach-Bliley act state specifically that organizations must identify and remedy threats that could result in unauthorized disclosure, misuse, modification or destruction of customer information. Docsvault offers fine-grained security and records retention system that can allow companies to ensure regulatory compliance.

### *# Scenario 4: Overseas customer needs information and it's nighttime in your country already*

This scenario has become more common with globalization. Docsvault's Enterprise Edition offers web access feature that allows access to repository anytime, anywhere through simple internet browsers. So no matter where you are or what time your customer calls, you are ready with accurate information.

### *# Scenario 5: Your heavy files containing product literature, etc. needs to be shared with customers*

Sharing documents and literature through emails or messy FTP servers is an old idea. The new idea is to share the link to your folder in Docsvault repository where you have all the latest product literature, etc. saved and you are ready to go in a minute. No more waiting for never-ending file transfers or ftp uploads.

## Conclusion

Business experts say organizations that make customer service a vital guiding principle in their business have a greater chance to succeed than those who are indifferent to such practices. While everyone is quick to point out the inefficiency of customer service team, few are aware of the tools and systems that they require to do their work more efficiently. Docsvault helps customer service representatives from the time of lead generation through to proposal, negotiation, deal closure and after-sales service. In conclusion, Docsvault helps your organization to serve customers better by:

- ✓ Keeping your product / marketing literature and collaterals handy
- ✓ Protecting important documents, contracts and reports
- ✓ Making sensitive information like customer emails and contracts available only to authorized users
- ✓ Making communication and collaboration effortless with document sharing and workflow tools
- ✓ Allowing staff to become more productive and organized
- ✓ Keeping customer service and sales team motivated with increasing perfection in work

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