



# Business Solutions

Help Documentation

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## Education

In a classroom, teachers often utilize a variety of teaching methods to help students understand a particular subject. So why wouldn't educators and administrators apply that same concept to the way they communicate to the diverse communities they serve? With SmarterTrack, elementary to post-secondary educational institutions can quickly and efficiently provide support to parents, students, faculty, and staff.

### Manage Student Affairs Through Tickets

- Allow parents to submit questions and concerns via email with trackable results by class, topic, semester, and more.
- Encourage teachers to submit tickets for assistance, support, maintenance, disciplinary follow-up, and more.
- Allow students to coordinate schedules with attendance tickets and provide class assignments by return attachment.
- Create an environment where classroom aids, teachers, professors, and administrators can transfer tickets among and between departments and teams.

### Monitor Your School's Website Visitors

- Monitor your website and cultivate interest in prospective students by proactively inviting them to chat.
- Track where school website visitors originate and target recruitment efforts based on that information.

### Enhance Communication Through Live Chat

- Offer personalized support to prospective students anywhere in the world with Live Chat.
- Expand office hours and efficiency by allowing students to access teachers during "Live Chat hours."
- Create the feel of a virtual classroom by providing Live Chat capabilities to your Web-based curriculum.
- Offer individualized tutoring assistance to students and push relevant Web resources to them in real time.
- Decrease wait time for advisement sessions by providing students the ability to talk to counselors via Live Chat.

### **Interact with Students, Parents, Faculty, and Staff Through the Portal**

- Use the Knowledge Base to give students immediate access to the latest information, including schedules, manuals, policies, student aid forms, video tutorials, and assignment tips.
- Give faculty and staff instant access to payroll information, internal documents, news items, and more.
- Give parents updates about school policies, parent/teacher conferences, holidays, events, and other important news.
- Allow parents to view student assignments in real time.
- Create Knowledge Base articles that address recurring problems and make them instantly accessible to help students to resolve their own issues.

### **Real Estate**

Real estate and property management require the tight coordination of staff, dozens of vendors and contractors, and hundreds of customers (e.g buyers, sellers, and tenants). Each one requires follow-up and coordination to achieve success. SmarterTrack's complete solution is ideal for bringing productivity and efficiency to this dynamic and competitive environment.

### **Improve Seller and Buyer Communication with Tickets**

- Allow buyers and sellers to submit requests and documents via trackable tickets to facilitate faster response.
- Assign project tickets to signage teams, contractors, and office staff to ensure task completion.
- Create reports for owners and sellers based on the types of inquiries for their respective properties and suggest ways to improve responses and interest with real data.

### **Use Events and Notifications to Monitor Work Flow**

- Receive instant notification via email, text message, and/or desktop alert when an appraisal has been received, an inspection report has been completed, repairs have been accomplished, and more.
- Flag inquiries for specific properties and receive alerts to prompt faster responses.
- Create alert policies so that appraisals, written offers, and payoff letters are addressed before expiration.

### **Enhance Communication with Prospects, Landlords, Tenants, and Home Sellers via Live Chat**

- Let potential home buyers and tenants ask simple questions in real time regarding the property that they are interested in.

- Encourage vendors and contractors to get quick answers and clarifications quickly via Live Chat and report and document those conversations.
- Create “virtual” open house events where prospects can view properties online and ask pertinent questions in real time.

### **Find Out Who is Looking at Your Properties Online**

- Monitor your website and interact with prospects as they view specific property specifications and images.
- Push additional property information or alternative properties to site visitors as they browse.
- Geographically locate website visitors and tailor options based upon their neighborhood or location of interest.

### **Use the Portal to Deliver Information to Sellers, Buyers, Contractors, and Tenants**

- Store standard information and common questions as searchable Knowledge Base articles, including: common terms, how to request repairs/service, who to contact, and more.
- Store standard agreements and forms online for easy download and reference.
- Use news items to highlight new or featured properties. Allow prospects to subscribe to receive the latest information as it is posted.

## **Advertising**

Copywriters, design professionals, media buyers, sales teams, creative concept providers, and clients all interact in the dynamic world of modern advertising. Coordinating and tracking these complex communications and interactions is both more difficult and more important than ever before.

SmarterTrack is the perfect solution to manage these vital communication channels and deliver results to advertising organizations and their clients.

### **Improve Coordination and Assignments with Tickets**

- Use trackable tickets to submit tasks to internal teams and external contractors. View the current progress/status of these tasks from any Web browser, anywhere in the world.
- Allow customers and contractors to submit requests and updates via tickets 24/7.
- Improve communication documentation by storing entire contact histories by task or project in one convenient, searchable interface.
- Track and report on subcontractor response and task completion times.

### **Monitor Work Flow and Guarantee Deadlines**

- Send instant notifications via email, text message, and/or desktop alert upon a specific problem report, contact by certain customers, missed/approaching deadlines, and much more.
- Automatically alert senior staff regarding request workload and backlog by customer, project,

department, and more.

- Notify sales and marketing teams regarding inbound requests from existing top-tier customers.

### **Turn Your Website into an Interactive Marketplace with Live Chat and WhosOn**

- Allow prospects and contractors to ask basic questions in real time via Live Chat.
- Geographically locate website visitors and funnel leads to sales teams faster than ever before.
- Push additional Web pages and other content to visitors as you guide them through the site.

### **Deliver Relevant Information via the Portal**

- Store standard information and common questions as searchable Knowledge Base articles on topics such as style guides, publication standards, specifications, deadline/submission calendars, and much more.
- Store standard agreements and forms online for easy download and reference.
- Give customers and contractors world-wide access to step-by-step instructions for content submission.

## **Manufacturing**

Contemporary manufacturing requires the coordination of dozens of staff members, multiple suppliers, sales teams, distribution channels, and sophisticated customer requirements. More than ever, manufacturing companies need powerful tools to manage these complex processes and deliver success. SmarterTrack is ideally suited to serve as the central hub for all communication channels to streamline operations and processes.

### **Improve Satisfaction and Response with Tickets**

- Streamline service/support requests and ensure timely and accurate responses.
- Automatically transfer or escalate certain issues or product inquiries to specialized staff.
- Improve service/support request documentation by storing entire request histories in one convenient, searchable interface.
- Automatically search previous service/support requests and instantly display these potential solutions to your teams to reduce duplicated efforts.

### **Use Events and Notifications to Monitor Work Flow**

- Send instant notifications via email, text message, and/or desktop alert upon a specific problem report, contact by certain customers, issue escalation, and much more.
- Receive notifications based upon SLA thresholds to ensure satisfaction.
- Automatically alert supervisors and management regarding workload and backlog.
- Notify sales and marketing teams regarding inbound requests from existing top-tier customers.

### **Turn Your Website into an Interactive Marketplace with Live Chat and WhosOn**

- Allow prospects to ask basic questions regarding offerings while they are on the company website.
- Geographically locate website visitors and funnel leads to regional sales teams faster than ever before.
- Push additional Web pages to visitors to guide them through the site toward their solution.
- Allow experienced team members to monitor these interactions and coach or co-chat during these interactions to capture more opportunities.

### **Reporting for Efficiency, Quality Control, Marketing, and More**

- Create custom reports of service/support requests by product, manufacture date, facility, and more.
- Identify defect reports by OEM supplier and/or part number.
- Use business intelligence reporting to pinpoint service costs to the product or virtually any other identifier.
- Identify new prospects and markets by service/information requests and report this information automatically to sales and marketing teams.

### **Deliver Product Information via the Portal**

- Store standard information and common questions as searchable Knowledge Base articles, including: common terms, how to request service, MSDS information, specifications, and much more.
- Store standard agreements and forms online for easy download and reference.
- Record video “how to” and assembly instructions for easy and instant access 24/7.
- Use news items to highlight new or featured products and to distribute product updates. Allow customers and prospects to subscribe to receive the latest information as it becomes available.

## **Financial**

Increased market competition, mergers and acquisitions, deteriorating credit quality, and the need for quick return on investments are forcing many financial institutions to seek new ways to drive revenue growth, increase customer profitability and limit credit losses. At the same time, revenue requirements and cost-cutting are forcing banks and other financial institutions to reach the bottom line with fewer resources. With SmarterTrack, financial institutions can capitalize on a cost-effective customer service solution that will ensure strong relationships between clients and employees.

### **Manage Your Clients' Banking Needs Through Tickets**

- Allow customers to submit questions and concerns through email with trackable results by account, topic, and more.
- Offer website visitors seamless escalation to assisted service channels if initial questions are not answered.
- Create an environment in which tellers, loan officers, financial advisors, and bank managers can transfer Tickets for faster, more accurate responses.

### **Track Visitors on Your Financial Institution's Website**

- Identify website visitors that indicate a propensity to open an account and target them with personalized assistance.
- Track visitors who reach your site via referring sites and treat them as hot leads.
- Gain valuable insight into online customer acquisition initiatives with detailed reporting on application completion rates, abandonment points, entry pages, and navigation paths.
- Use geographic mapping to alert specific branch offices of local interest.

### **Enhance Communication with Clients, Associates, and Employees Through Live Chat**

- Foster long-term customer loyalty and satisfaction by providing online assistance and proactively satisfying client needs.
- Provide real-time answers and steer site visitors to the loan options that best meet their needs.
- Help visitors understand the process of debt settlement programs and supply information on legal options by providing instant access to financial advisors.
- Prequalify site visitors and guide them to products and services using push-page technology.

### **Improve Efficiency with Custom Reports**

- Use business intelligence reporting to evaluate the cost-effectiveness of different loan programs.
- Create custom reports evaluating loan officer response time, the effectiveness of underwriters, the length of time it takes a loan to close, and more.

### **Interact with Clients, Associates, and Employees Through the Portal**

- Use the Knowledge Base to give customers immediate access to the latest information, including interest rates, credit card offers, debt consolidation options, loan procedures, financial planning options, and ongoing promotions.
- Store standard agreements and forms online for easy download and reference.
- Give employees and associates instant access to payroll information, internal documents, and more through the Portal.

- Create Knowledge Base articles that address recurring questions and make them instantly accessible to help clients resolve their own issues.

## **Insurance**

As insurance companies expand their traditional offerings such as home, auto and life insurance to include retirement planning, estate planning, and other financial services, cross-selling becomes crucial to the growth and success of the company. Because rates may vary only slightly, insurance providers must differentiate themselves through an integrated customer service approach. With SmarterTrack's complete customer service solution, insurers can quickly and efficiently provide superior service to clients, agents, and brokers.

### **Manage Claims and Communications Through Tickets**

- Streamline operations and improve business process workflows by allowing clients, agents, and brokers to submit inquiries and rate quotes via trackable Tickets.
- Allow clients and agents to submit insurance claims and support documents via Tickets at any hour of the day.
- Improve claims documentation by storing entire communication histories in one convenient, searchable interface.

### **Monitor Your Company's Website Visitors**

- Geographically locate website visitors and funnel leads to local agency offices faster than ever before.
- Track visitors who reach your site via referring sites and treat them as hot leads.
- Push additional insurance information, such as coverage clauses and rate tables, to website visitors as they browse.
- Enhance Communication with Clients, Agents, and Brokers Through Live Chat
- Foster long-term customer loyalty and satisfaction by providing online assistance and proactively satisfying client needs.
- Provide real-time answers and guide site visitors to the insurance options that best meet their needs.
- Help visitors understand estate and financial planning options or claims procedures by providing instant access to financial advisors and claims agents.

### **Improve Agent Efficiency with Custom Reports**

- Identify new prospects and markets by claims or quote requests and automatically report this information to the appropriate agents.
- Create custom reports to evaluate claims by amount, type, neighborhood, policyholder, and more.



### **Interact with Clients, Agents, and Brokers Through the Portal**

- Use the Knowledge Base to give clients immediate access to the latest information, including rate changes, policy offerings, payment schedules, discount eligibility, and more
- Give agents and brokers instant access to payroll information, internal documents, and more through the portal.
- Store standard agreements and forms online for easy download and reference.
- Create Knowledge Base articles that address recurring questions and make them instantly accessible to help clients and agents resolve their own issues.

## **Government**

Government agencies typically provide a host of citizen contact points for a wide range of services. Whether searching for information on street repairs, community programs, or passports, finding the right department to address a citizen's concerns can be time-consuming and frustrating. Now more than ever before city, state, and regional governments are faced with the challenge of meeting increasingly complex operating requirements with fewer dollars and scarcer resources. Compounding this challenge are the increased expectations from citizens for easy access to information and world-class service levels. With SmarterTrack, government officials and employees can increase citizen satisfaction while also reducing costs and improving operational efficiency.

### **Manage Constituent Communications Through Tickets**

- Allow new residents to set up services such as water and trash pick-up via trackable service tickets.
- Record, track, and escalate incoming issues to the appropriate individual or department, providing effective resolution to citizen inquiries the first time around.
- Process and track public information requests from residents and news media.
- Give citizens around-the-clock access to check the status of tickets and service requests.

### **Monitor Your Company's Website Visitors**

- Track where website visitors originate and target tourism efforts based on that information.
- Identify trends and target outreach campaigns that best meet constituent needs.
- Gain valuable insight into resident behaviors and interests, and use that information to identify and pursue economic development opportunities within in your community.

### **Improve Employee Responsiveness and Constituent Relationships Through Live Chat**

- Allow residents to ask questions about government programs and services in real time.
- Create virtual town halls and allow constituents to chat with elected officials about pertinent issues in real time.

### **Increase Citizen Access and Improve Service Through the Portal**

- Use the Knowledge Base to provide residents with information about government programs and services, including code compliance guidelines, council and board meeting minutes, recreation and special interest classes, and office closures due to government holidays.
- Facilitate discussion between residents, government officials, and staff with online forums.
- Store standard forms online for easy download and reference.
- Create Knowledge Base articles that address recurring problems and make them instantly accessible to help constituents resolve their own issues.
- Encourage residents to stay informed by subscribing to news items via RSS feeds.

### **Travel**

Companies in the travel and hospitality industry are operating in increasingly complex and competitive environments, and often the only way these companies differentiate themselves is on the consistency of their brand in terms of service, customer experience, price, value, and convenience. With SmarterTrack, airlines, travel agencies, and hotels can increase online booking and earn customer loyalty by providing better customer service and streamlining day-to-day operations.

### **Manage Inquiries and Bookings Through Tickets**

- Allow customers to submit booking requests and concerns via trackable tickets to facilitate faster response.
- Automatically transfer travel requests or destination inquiries to the appropriate agent(s).
- Improve communication documentation by storing entire contact histories in one convenient, searchable interface.

### **Monitor Your Company's Website Visitors**

- Track visitors who reach your site via referring sites and treat them as hot leads.
- Identify website visitors that click on high-value pages—such as those featuring convention space, wedding halls or information on room blocks—and invite them to chat or speak with a site representative.
- Track where website visitors originate and target marketing efforts based on that information.

### **Increase Bookings and Enhance Communication Through Live Chat**

- Offer personalized support to prospective travelers anywhere in the world with Live Chat.
- Help travelers find deals and vacation packages by pushing relevant pages to them.
- Resolve booking or trip-search problems in real time.

**Interact and Provide Up-to-date Information to Travelers Through the Portal**

- Use the Knowledge Base to give travelers immediate access to the latest information, including booking policies, government-issued travel advisories, required travel documents, featured destination profiles, and general travel tips.
- Highlight featured destinations or vacation packages with news items and encourage customers to subscribe to receive the latest information as it becomes available.
- Facilitate communication through forums and encourage travelers to interact and share their experiences or sightseeing suggestions.