CUSTOMER SERVICE POINT

EFFICIENT E-MAIL WITH OUTLOOK 2003!

Erwin Steneker

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subscribers to the newsletter of Customer Service Point.
If you've got it through other channels, I recommend
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Introduction

Answering your business email promptly should be a priority for every business. Not only is e-mail an important communication line with your customers, it is often used by them to gauge that your trustworthy.

If a customer sends you an e-mail with a simple question, and you take forever to answer it, what does that say about the rest of your operation? It's one of the tell-tale signs customers use to separate men from boys. And we all want to play with the big guys, don't we?

Business email should be answered within 24 hours max. **No exceptions.** At that rate, you're doing a lot better than a lot of other businesses. If you really want your customer service to shine, you should consider answering your business email twice a day with a 12 hour interval. Or more often, as your business warrants.

Let me show you how you can handle your e-mail **efficiently** with Microsoft Outlook™ 2003.

Automatic Reply on Receipt

Whatever interval you choose, it's just common courtesy to let your customer know these two things, as soon as you receive the mail:

- That the e-mail has reached you.
- When she can expect an answer.

Outlook™ has a function in place that can help you do this! But first, we have to write a reply template to send.

Writing a reply

Time to write!

So, start up Outlook™ and we're all set to go!

Welcome back. Oh, you have to take care of a couple of incoming customer mail first? No problem. I understand. Customers have priority. I'll wait until you're ready.

Writing the reply to be sent couldn't be easier. Just start out to write a new e-mail, just as you normally would. (I won't explain that here). But leave all address fields empty, as well as the subject. On reply, these fields are filled automatically, so we don't need to fill them now.

Next, type a reply message. Remember, you want to tell that you have received the mail, and by when she can expect an answer. It could be something like this (just a short example, make it to fit your needs).

```
Hi,

Thanks for taking the time to contact me. I really
appreciate it.

Just wanted to let you know that your message has reached me
safe and sound. I usually answer my mail twice a day, so
expect an answer within the next 12 hours.

All the best,

Erwin Steneker
www.customerservicepoint.com
```

Remember to write with **your** customer in mind. This tone of voice may be all wrong for your particular type of client. Also, if you have some helpful pages that may help your customer along, why not add them in a P.S. Sometimes you can help the customer help himself!

Now for saving the template. Select **File** in the menu, and then **Save as...** In the file dialog box, enter a name to save, for example **support reply**.

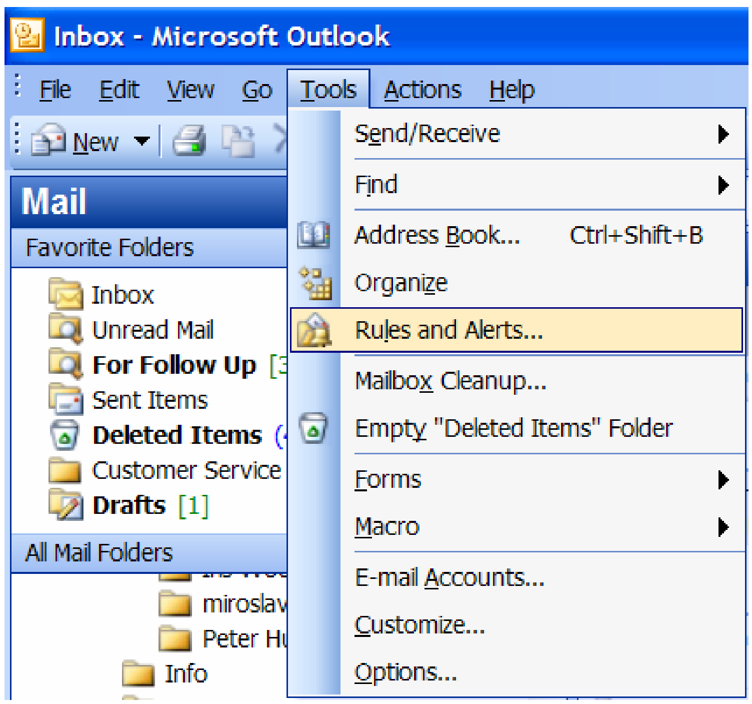
Next, under **Save as type**, select **Outlook template (*.oft)**. Note: this will automatically change the directory to Outlook's standard Template directory. Great! This is a good place to save the reply. Click on the **Save** button.

OK, we're all set for the next step...

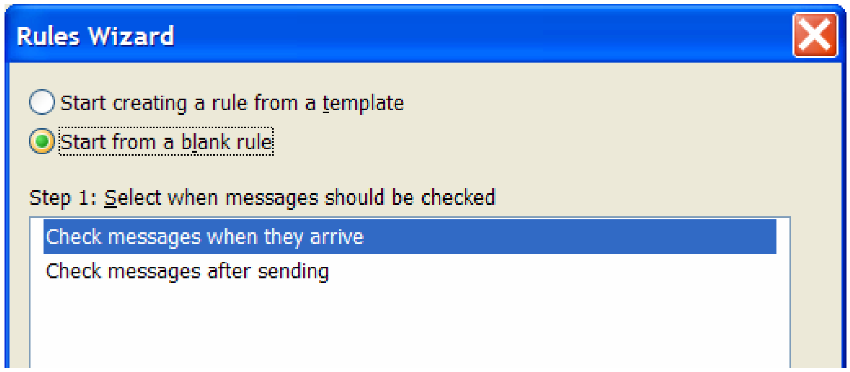
Setting up an automatic reply rule

In this practical guide I assume that you have set up a specific mailbox for support requests, called something like support@customerservicepoint.com, and that Outlook™ is able to receive e-mails sent to that mailbox. Substitute this mail address with your own.

Make sure you have selected the Inbox, and choose the **Tools** menu. Then select **Rules and Alerts...**



The **Rules and Alerts** window is shown. Choose the **New Rule...** button to create a new rule. The Rules wizard window appears. Select radio button **Start from blank rule**. The option **Check messages when they arrive** is chosen by default. It should look this:

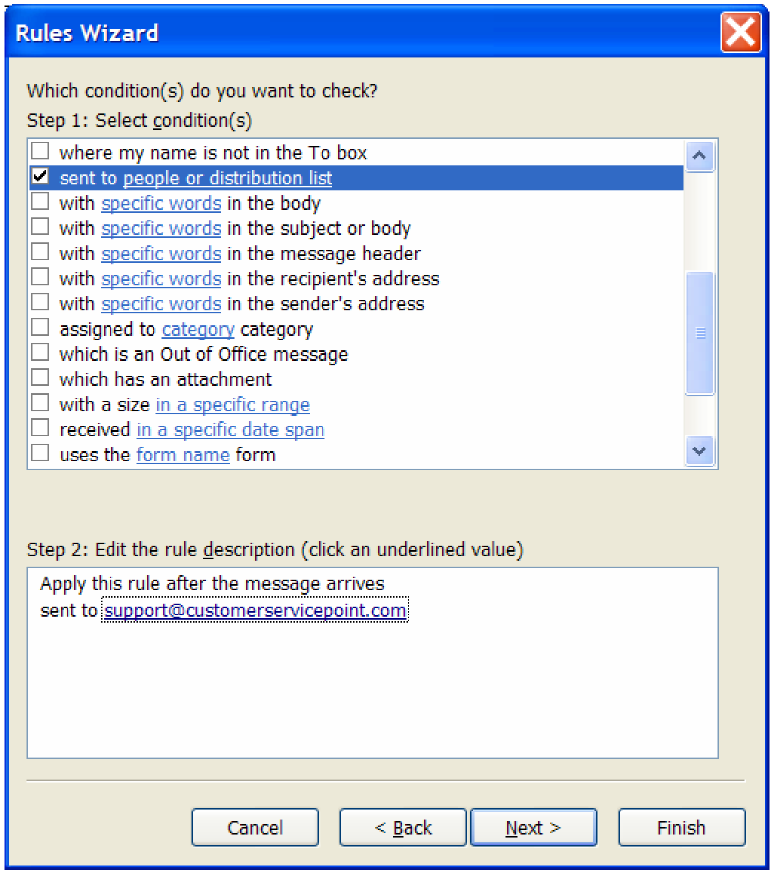


Click on the button **Next >** to set the conditions. With this you will define to which incoming mails this rule applies.

For this example, only one condition will be set. Remember that we wanted to send a reply to all mails sent to support@customerservicepoint.com? So, scroll down the list under **step 1** until you see the option **sent to people or distribution list**. This will add this condition under **Step 2**, where you now can click on **people or distribution list** (See? It's underlined).

In the **Rule Address** window you can select an e-mail address from your address book or contact list. However, I don't have my own support mail address in the list, so I just type the e-mail address in the field next to the **To ->** button. Click **OK** when you're done.

If all is well, it should look like this:

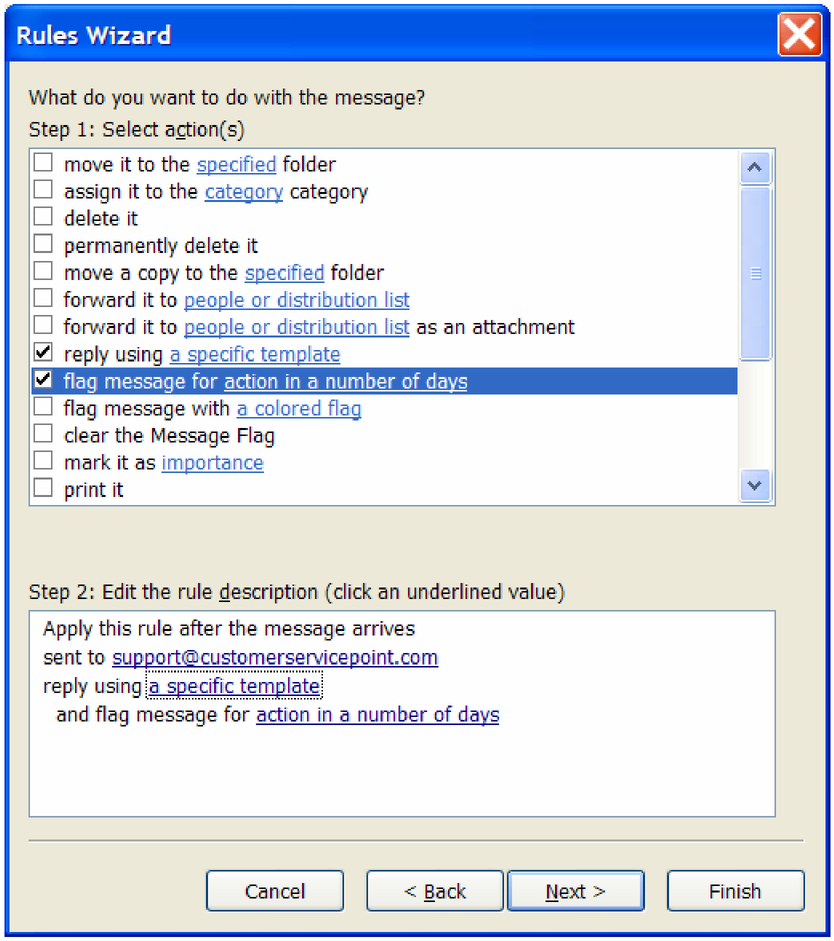


Time to click on **Next >**, because now we're ready for some **action!**

Again, there's **Step 1**, where you select the action, and below that **Step 2** where you fill in the specifics.

Select **Reply message for action in a number of days**. I also like to flag the message for action, so I also check **flag message for action in a number of days**.

Your screen should look something like this:



Click on **a specific template** under **Step 2**, and a dialog box pops up where you can select the reply template you made previously. The window starts to look in **Standard Templates** but here you need to select **User Templates in File System**.

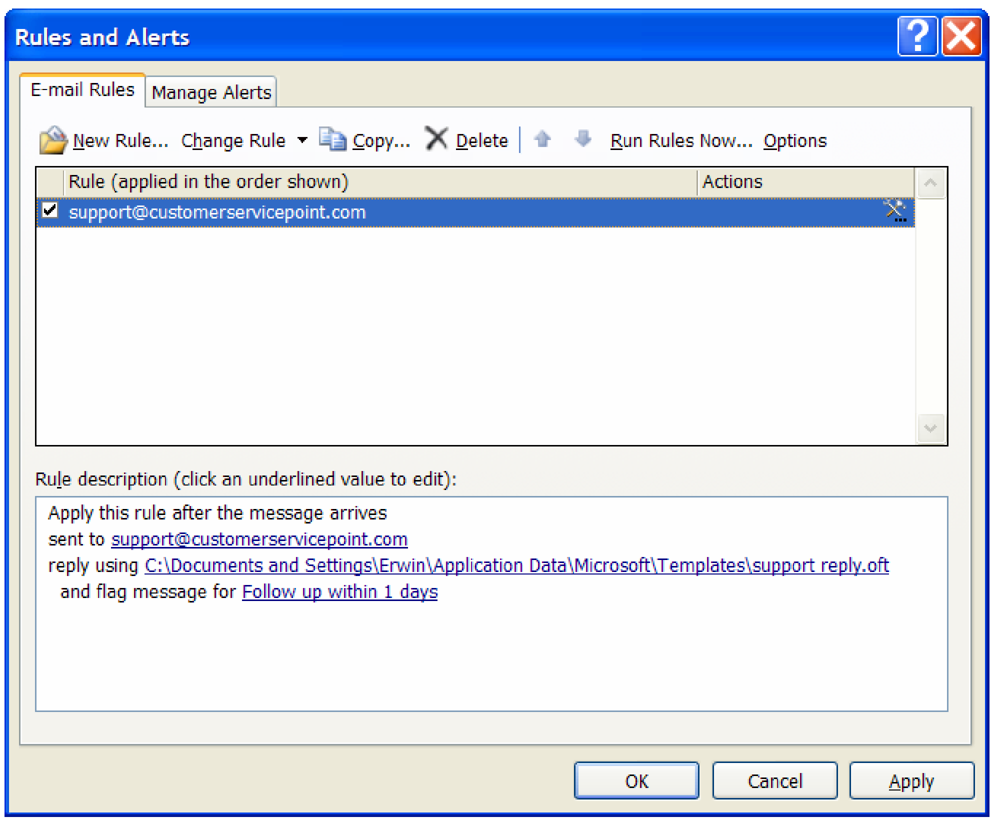
Select the **support reply** template you saved earlier, and click **Open.** The **Rules Wizard** window will change to reflect your selection.

Next, for setting the follow up flag, click on **action in a number of days**. In the dialog box, **Follow up** is selected by default. In the **By:** field enter a value of **1** days. Click **OK.**

All specifics are set. Choosing **Next >** would allow you to choose exceptions for your rule, but since we don't want that now, click on **Finish.**

That's it! Your system is now set up to send out an automatic reply whenever it receives a message to your support inbox. **One note, however.** Outlook™ must be up and running, and checking mail regularly.

Here's the screen shot of the **Rules and Alerts** window, after creating the rule.



Two more tips: If you like, you can change this rule, if needed, by selecting the **Change Rule** button. And if, for some reason, you want to deactivate the rule, just uncheck the checkbox next to the rule.

More uses for rules

Maybe you have set up a number of mailboxes: one for support, one for sales, one for the webmaster, etc.

With rules, you can automatically forward the mail to a specific person in your business responsible for that specific mailbox. This is very simple to do. Just select **forward it to people or distribution list** as an action. Enter the e-mail address and hey presto! Automatic mail forwarding.

Combining rules you can build a complex set of rules to help you manage and automate your inbox. Describing all possibilities goes beyond this book, but if you study all options, and experiment a bit, Outlook™ can make handling your e-mail much more efficient!

Keeping Track of Customers

Before we start, I'd like to share a **true life story** with you:

A couple of months ago I bought a new car, and since the promised delivery date was creeping near, I decided to call the car dealer to ask for a status update. A friendly voice on the other end of the line introduced herself as Joyce. I said my name, and after she heard my request, she promptly forwarded my call to the appropriate department.

So far, so good.

"How may I help you?", the voice said.
"I'd like a status update on my order, please." I responded.
"Of course, Sir, can you give me your order number?"
"No", I replied, "I don't have that handy right now. But I do have a name!"
"Ah, that helps. Whose name is that?"
"Hmm… well… ***my*** *name. Erwin Steneker. Can't you find my order under* ***my*** *name?!?"*
Silence*. Then, the sales man said: "Sorry Sir, I need an order number,* ***or*** *the name of the sales person that helped you…"*
Sigh*. "… OK, let me track that down, and I'll call you back."*

3 minutes later. I have my order number.
Ring! I get Joyce again.
"Hi, this is Erwin Steneker once more. Can you forward me to the same person again, please?"
Silence*. "…Eh… hmmm… sorry? How can I help you?"*

It couldn't have been more than 5 minutes ago I spoke to her. ***5 minutes!*** *Talk about a* ***short*** *memory!*

There are lessons to be learned here:

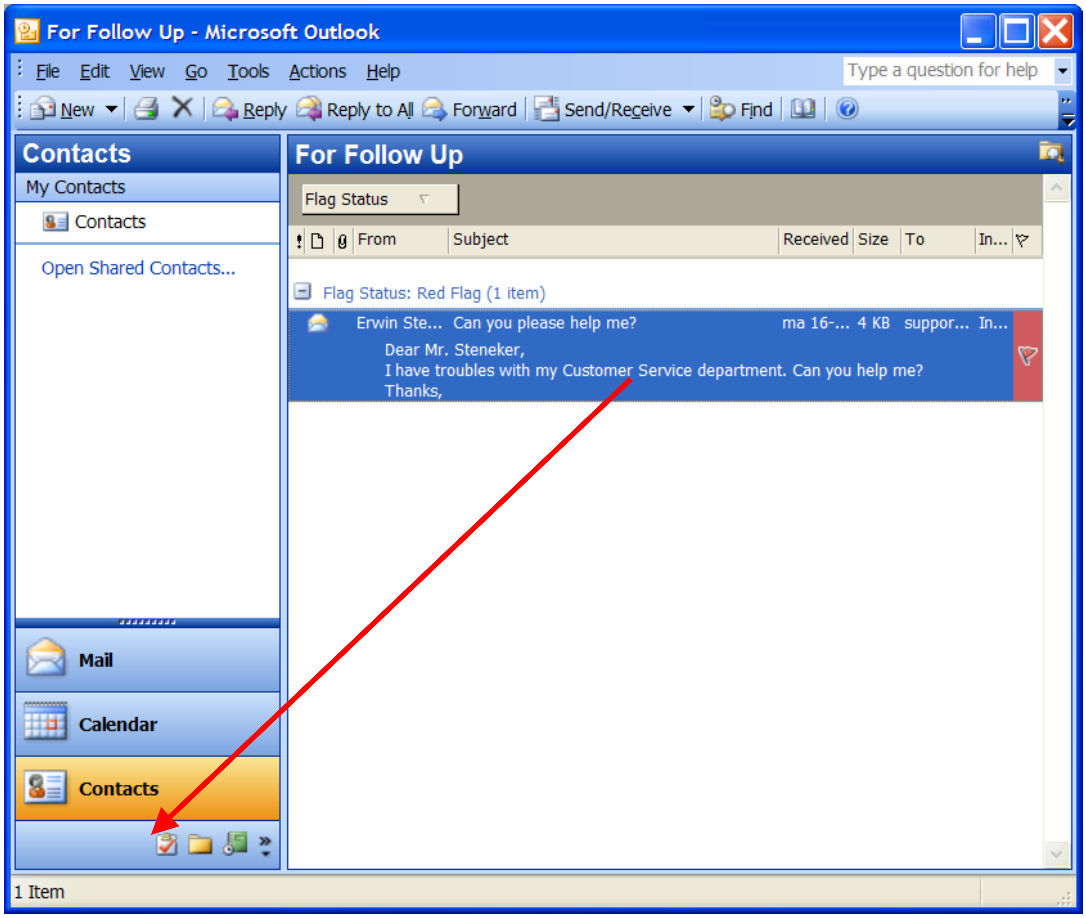
1. Customers have names, **not** numbers. Systems that don't allow for that are Stone Age.

2. Keeping track of previous encounters with a customer is important, **if** you don't want to look silly.

Outlook™ can help you keep track, so you don't have to rely on your memory. If you create a contact for each (potential) customer, Outlook™ will keep track of all your e-mail, meetings, tasks and journal entries associated with that customer.

Creating a contact

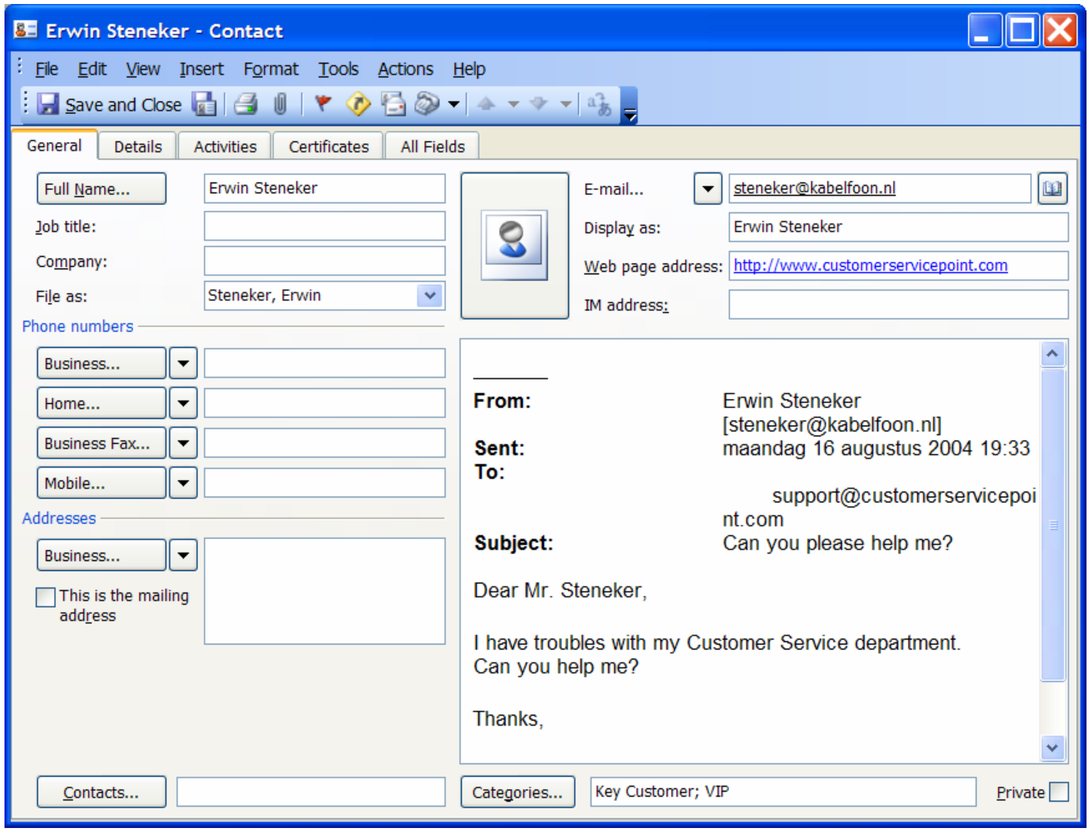
Few people know this, but creating a contact can be done extremely easy with the e-mail message.



Just **drag** the message to the **Contacts** bar, and **drop** it.

For those who don't know it: ***dragging*** *is clicking and holding the message with your mouse, while moving it to the destination.* ***Dropping*** *is the release of the mouse button.*

After you have dropped the message on the **Contacts** bar, a window will be opened with a number of fields already filled in: the e-mail address is filled, a copy of the message body is placed in the remarks area, and Outlook™ tries to propose a full name (you will see that this doesn't always work right, but that doesn't matter).



Adjust the other fields appropriate for your needs. Click on the **Save and Close** button to finalize this contact.

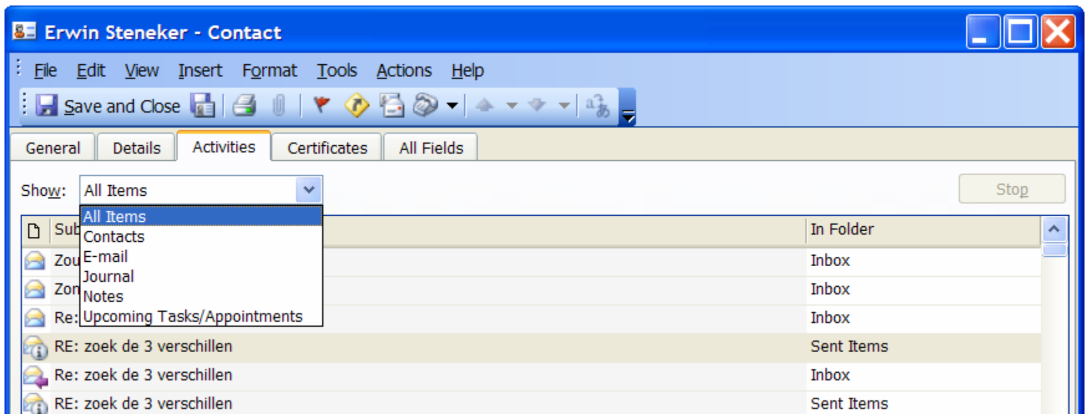
Tip: Make a habit of creating contacts this way. It is very easy, and if the contact already exists, you will be prompted by Outlook™ to either **update** that contact or **create** a new one anyway. In return, you'll be better equipped to keep track of your customers!

Overview of Contact Activities

This is a very powerful function!

Click on the **Contacts** bar, and select any contact you like by double-clicking the name. This will open the **Contact** window.

Now, to access the history f this contact, simply click on the tab **Activities**. Outlook™ will immediately start a search for all items associated with this contact: incoming and sent e-mails, tasks, related contacts, meetings and journal items.



If you want to focus on a certain type, select it in the field **Show**. This will filter out any items that are not of the chosen type.

Important note: *if you manipulate this list (f.i. you delete a message), be aware that you are actually manipulating the item (ie. the message), and* ***not*** *the list.*

As you can see, there is a lot to win if you add contacts in Outlook™. It provides you with easy access to the customer's contact history.

Planning Your Follow-up

OK. Your customer has sent you a support request. The automatic reply rule has done its job, the customer is up to speed. She knows that the mail is in your inbox, and she expects an answer. Within 12 hours.

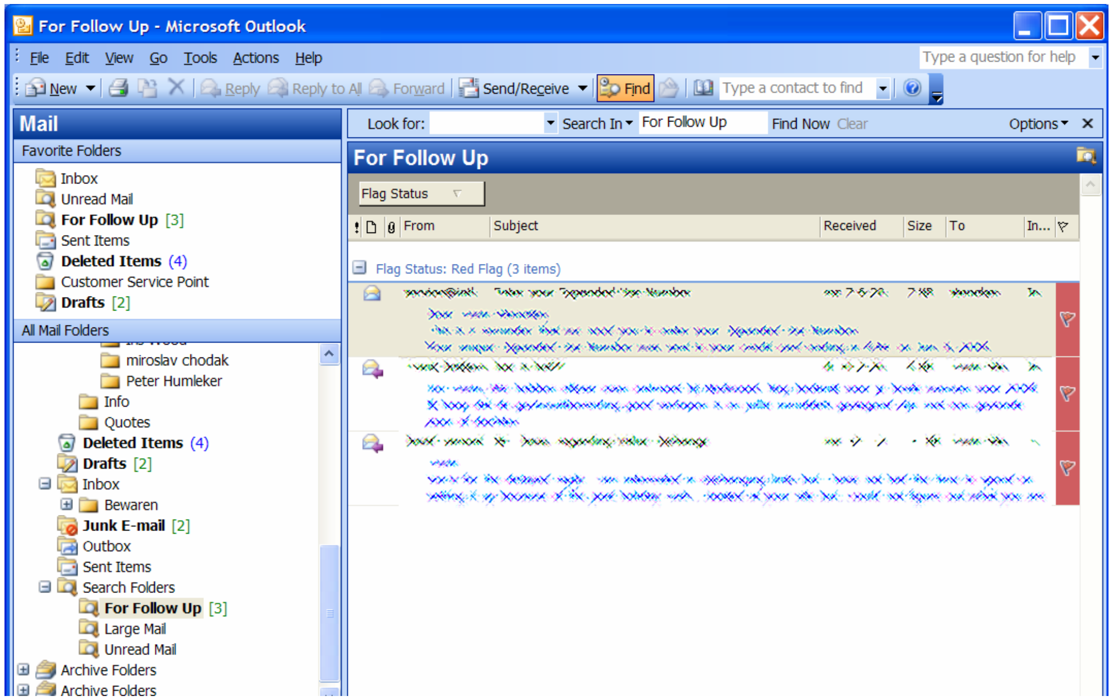
The clock is ticking. Now you have to deliver on your promise.

Handling the mail

The automatic reply rule has done more than just sending out an e-mail. It has set a flag on ever support request, to make sure they stand out between your regular e-mails. You can even quickly focus on flagged mails. Under **Search Folders** you can find a folder **For Follow Up**.

Click that folder, and all messages in your Inbox with a follow up flag will be shown. It's a great way to isolate important e-mails from all the rest.

It looks like this:



See the red flags at the end? Whenever you have handled an e-mail to your satisfaction, just click the flag, and it will change in a green √ and fall of the Follow up list.

Take a look at each mail on your list…

The first question is a simple one. You **could** answer that one on the fly.

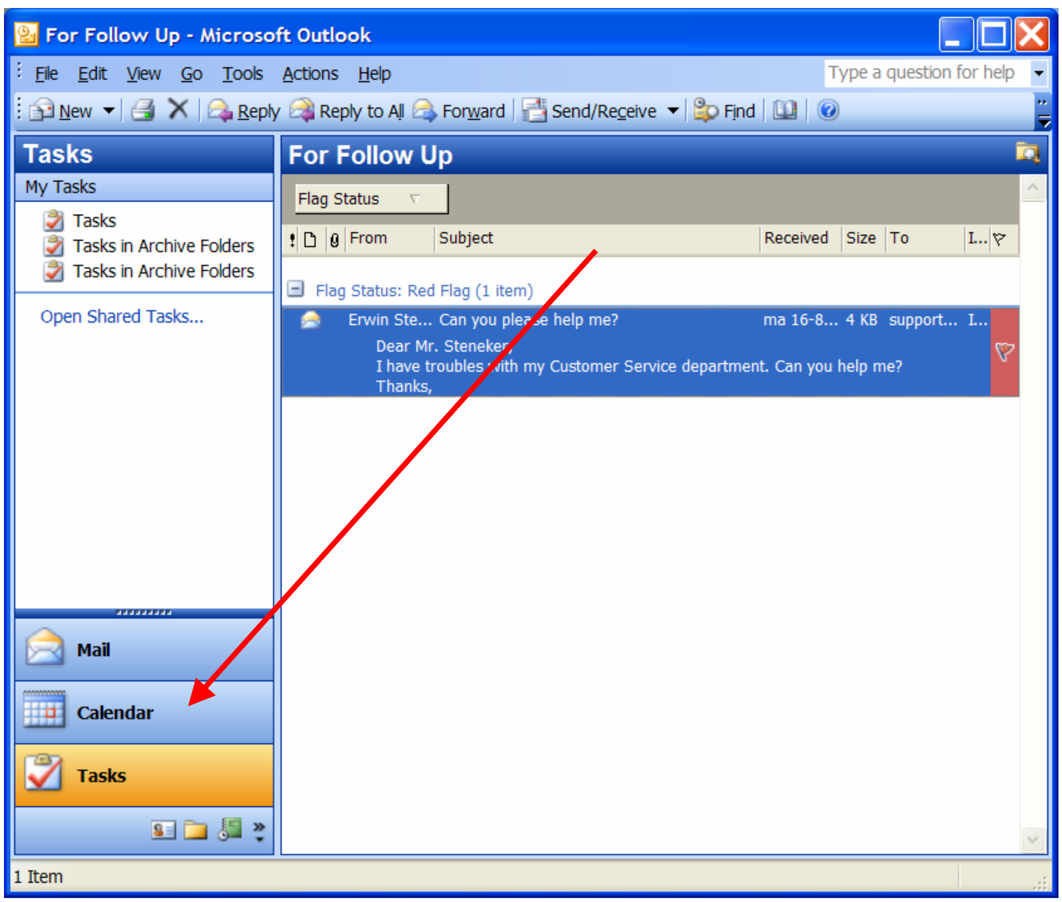
Stop! Better not. Unless you can oversee all mails, you can better check out the other mails first. **There is one exception though,** If you can immediately see that the mail is for someone else, forward it as soon as possible.

A quick glance at the rest of the mails show one mail for someone else, so you forward it immediately (if only every mail was **this** easy ☺), and two mails that mean more work.

Creating tasks for messages

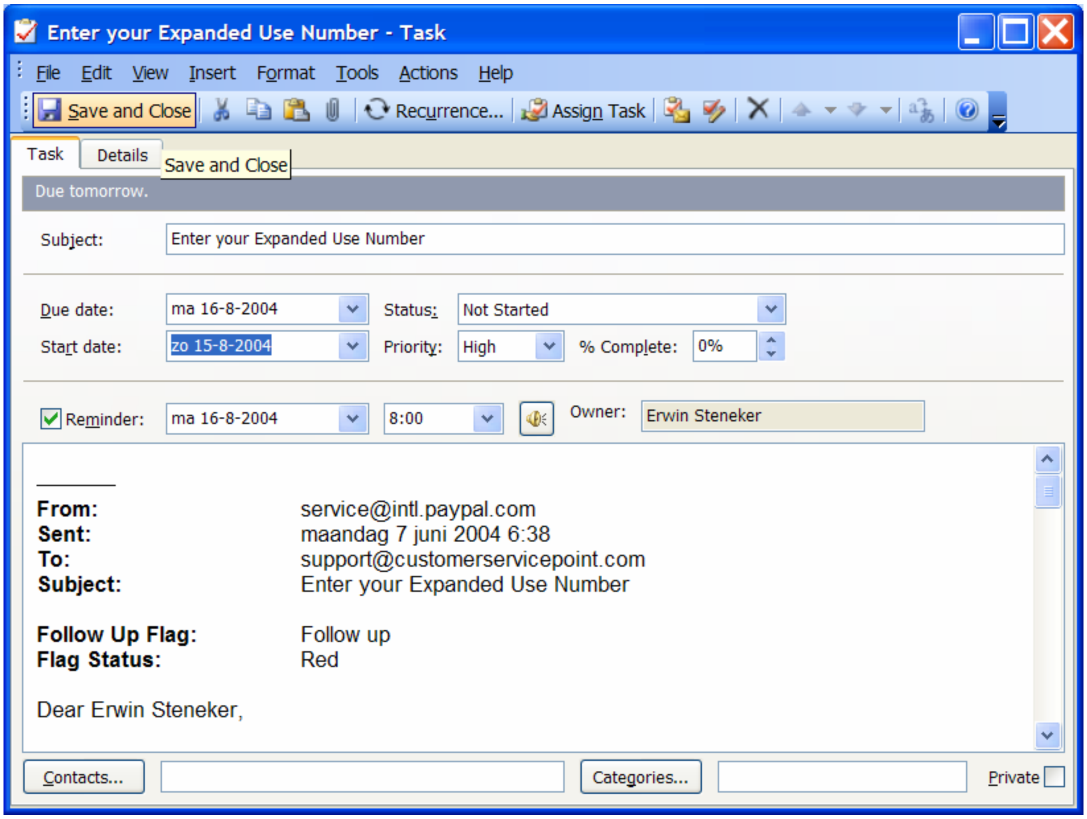
So, for these two mails, you have to do some more work. But you have other tasks as well, which you keep in the **Tasks** area of Outlook™. To track both your support tasks and your other tasks, you'll have to add a task for each message.

Similarly as with Contacts, it is very easy to add a task for an e-mail.



Just **drag** the message to the **Tasks** bar, and drop it. A **Task** is created with the same subject as the message. The body of the message is copied in the task for easy reference.

The only thing you have to do is to put the **Due date** in and other task oriented data. See the following example:



***Important note:** As you can see above the contact is not automatically filled. This is also true when the contact exists. If you want this task to show up for the contact, you'll have to click on the **Contacts...** button, and select the appropriate customer.*

After you have adjusted the contact as needed, you only have to click on **Save and Close** to finalize it. **Easy as pie!**

Now you have planned these larger activities, start replying on the others.
You can do this with more confidence now, knowing that these larger tasks are safely planned.

Nothing needs to fall through the cracks this way!

Tracking Your Work

Almost there. Take a deep breath as we go through the last stretch.

You've done a lot of work already to plan, track and follow up on customers and messages. Now you know **what** you must do. But wouldn't it be great if you could keep track of **when** you have done it and other activities?

This is what the **Journal** is all about!

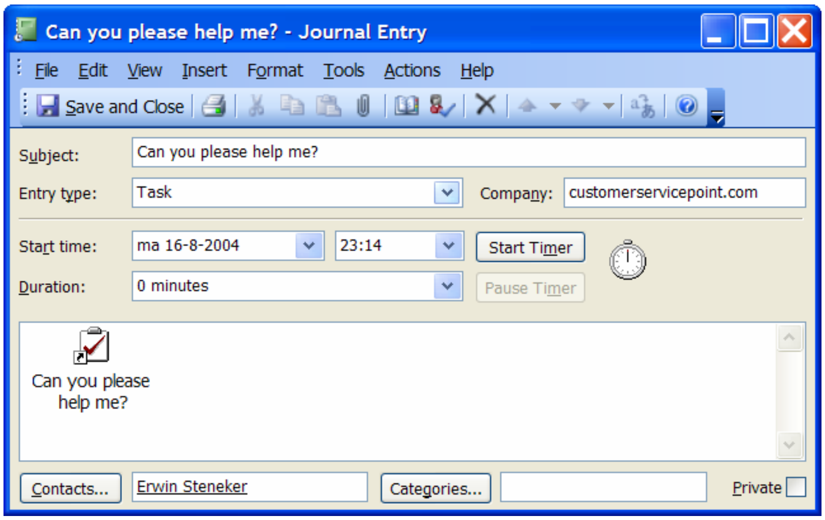
Creating a Journal Item

You can create **Journal items** to keep track of when you have done activities, and link it to certain activities. If this doesn't make sense to you, take a look at this example:

Remember the task you created in the previous chapter? Well, it's now half past 3, and you're going to start to work on it. To make a journal of the task, you drag the task and drop it on the ***Journal*** *bar.*

OK, you probably guessed that. That's great! This means that you are getting the hang of this dragging and dropping thing. Your work with Outlook™ is already getting more efficient…

As soon as you drop the task, a **Journal Entry** window appears. The **Subject** is taken from the task, and the **Entry type** is also filled in by default. Also, you see that system date is put in the **Start time** (actually start **date** and time). Below that is a link to the task at hand.



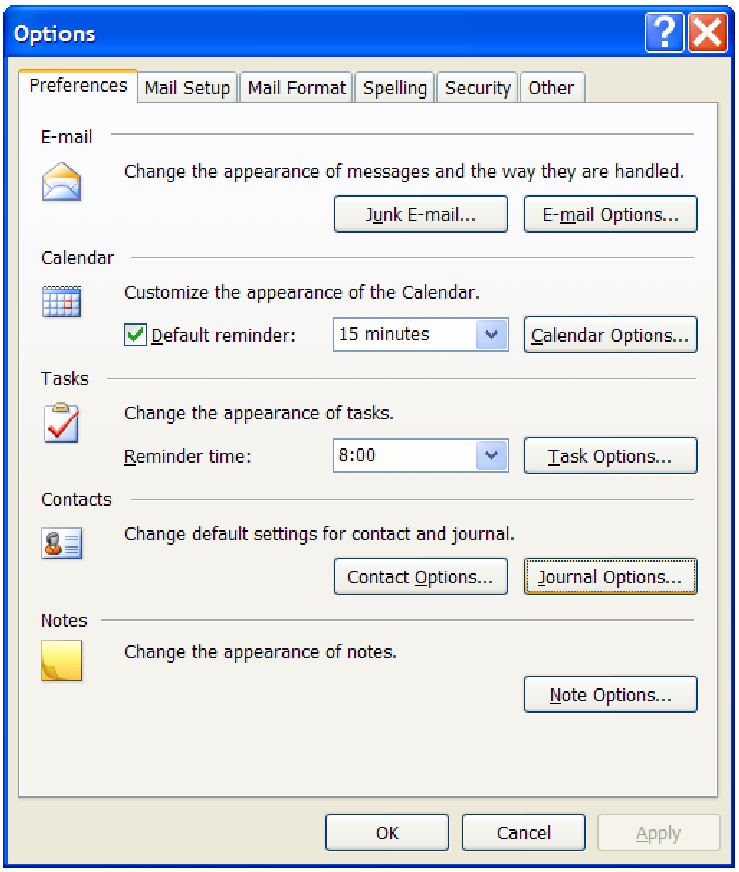
Now, click on **Start Timer** and start to work on the activity. Outlook™ will keep a timer going on this Journal item, until you **Pause Timer** or click on **Save and Close** to finalize the entry.

There are many more activities you can track through the Journal. Drag and drop a contact, and the Journal entry type will be **Phone call** by default. Drag and drop a Meeting from your calendar, and it will read **Meeting**. Drag and drop an e-mail message, and it will read… **E-mail message**!

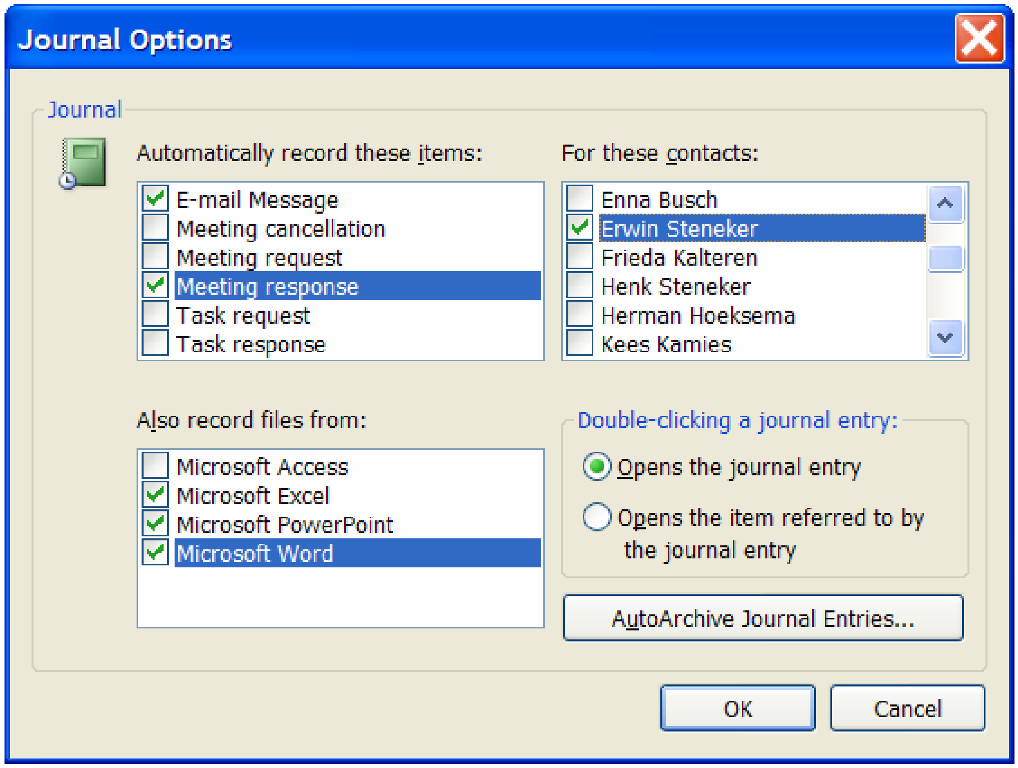
Oh well, Outlook™ really doesn't hold much secrets for you anymore, does it?

Automatic Journal creation

You can even have Outlook™ automatically record Journal items for specified activities and specified contacts. You set this up through the **Options** dialog. To get there, choose the **Tools** menu, and then the **Options...** menu item. It looks like this:



Then, choose the button **Journal options**. This will show the dialog box with the same name.



Select the journal item types and contacts for which you want to record through this mechanism. Outlook™ will then **automatically** track through journal entries when you work on these types of activities.

As you can see, Outlook™ also integrates nicely with the rest of Microsoft™ Office™. Check a file type, and a journal item will be automatically created for today if you save a document of that type.

Describing the ins and outs of automatic journal creation goes beyond the scope of this book, but experiment with it to see if it helps you in your tracking needs.

Keep Out of the Customers Junk Mailbox

I have one more important issue for you. Let me ask a couple of questions:

- If a customer sends a support request by e-mail to your company, does he want to get an answer?
- If you, in return, e-mail your customer, do you expect that your e-mail is delivered to the customer?

Chances are you answered "YES" on both questions. After all, the customer asks for an answer, so it's normal to expect that when you send an e-mail in return, that the customer receives it.

Unfortunately, this is no longer the case.

It is highly important that you get this point, so let me rephrase that: If you send an e-mail to a customer that the customer wants and expects, it may be that she never receives it!

Why is your mail not getting through?

The cause of this is the filtering of e-mail by the ISP of the customer, to prevent unwanted SPAM (unsolicited e-mail) to make its way into their mailbox. But not only genuine SPAM is filtered out. Even e-mail that the customer wants (and often expects) to receive, may be caught up in this filter. It's happening so often, there's even a term for it: **"false positives"**.

Sometimes this stays unnoticed, because the customer doesn't get a mail telling her that it was filtered out. Or you don't get a reply from the ISP/filter that your mail didn't pass. **Your "dolphin" support e-mail can essentially be caught in SPAM filter "tuna nets".**

This can impact businesses on many levels:

- Potential customers do not convert into real customers, because “you never responded”.
- Unhappy customers as they "never get an answer on their support requests".
- Unhappy Customers that don't get the info / product they paid for (download instructions for digital products are often delivered by e-mail)

When this happens, the customer usually points the finger to the business...

...YOUR business was not responsive;

...YOUR business didn't resolve the customer's issues;

...YOUR business did not deliver!

But, of course, **you** are not to blame. You responded! You resolved! You delivered! It's the customer's **ISP** that didn't deliver. An e-mail your customer **wanted**, and **expected**.

Mistakes do happen. But sometimes, ISP's and mail service businesses have no interest in righting what went wrong. And since they are not blamed, they get away with doing nothing.

What can an ISP or mail service do?

They can give their customers the possibility to "white-list". A "white-list" is a list of e-mail addresses or domains from which the customer allows mail to continue, even when the filter thinks it's "junk".

One option that's not an option is to ask customers to switch off the filter. SPAM is just too big a problem for this.

But in the mean time, this is hurting your business. And it won't change if not by your action. So...

What can YOU do?

It's time to point customers in the right direction. If more and more customers know where to complain if they do not get the e-mail they wanted, chances are that the ISP and/or mail service are forced into action.

So you have to **educate** and **activate** customers when they contact you:

- Ask them to white-list you. If you want to see an example, check out
- If they submit a form on your site, show a confirmation page telling your customer what to do if they don't get your automated response mail within a given time span, say 30 minutes (more on this below).
- If your mail is bounced because of spam, or the reason is vague, try mailing the customer through a Yahoo mail account.

There's a lot more to this than I can explain here, but **luckily, help is on the way…**

Additional helpful information

There is another company that has taken the heat for filtered mail: SiteSell. They were blamed for not delivering as promised, because their e-mail was filtered out. And they hit a wall of unresponsiveness when they tried to right this. Or was it that their requests were filtered out? ☺

As they understood how this is hurting their business, and many other businesses around the globe, they decided to take action, and point customers in the right direction when wanted e-mail doesn't make it into their mailboxes. So they created the "Deliver my mail!" initiative, which I fully support.

I invite you to join them and me. Read more about "Deliver my Mail!" on:
http://deliver-my-mail.sitesell.com/

Apply the advice they are giving, make use of the free downloadable package, and keep your mail from getting filtered…

Your business may depend on it!

Stay in touch...

After reading the book, you may have been left with a few questions. Or you'd like to stay informed on good customer service. Here's the information you need!

If you have a question!

Well, this is a simple one.

Just ask!

Simply go to the **contact information** page at Customer Service Point at this address:

http://www.customerservicepoint.com/contact-info.html

Enter your information, and I'll get back to you as soon as possible. Don't be shy!

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At your service,

Erwin Steneker

About the Author

Hi, my name is Erwin Steneker, author of this little book you're now reading, and owner of the customerservicepoint.com website.

I have over 13 years of experience in support. Currently, I'm working as a senior consultant at Capgemini Netherlands. Before this, I worked in IT support at Sara Lee/Douwe Egberts.
I started my career in support on the consumer sales department at Grolsch, a quality beer brewer in the Netherlands.

At the time of writing I'm 37 years old. I live in the Netherlands with my wife and three children.

About Customer Service Point

I started **Customer Service Point** in August 2003, because I felt that customer service as a profession and as a marketing tool was highly underrated.

Why is **good customer service** becoming so important these days? It's simply because customers, who are not getting quality support, are turning their backs to the sites that do not deliver it.

Read more at www.customerservicepoint.com, your resource on good customer service.

It's been quite a roller coaster ride since I started the web site. To be honest, I didn't expect this level of success... I've come into contact with folks around the globe, and the number of visitors is continually rising. My Alexa rating puts my site in the top 1% of the web.

The site has been built using Site Build It! This web site building, hosting and marketing tool and method has really made the difference.

Highly recommended!

Notes

Notes