Enabling Super-Service with
VisNetic MailFlow

Email and web-based communications are growing faster than any other means of customer interaction. Used correctly, email has the capacity to help you deliver quality online service, establish lasting customer relationships, improve customer loyalty and satisfaction, and even reduce service costs.

Channeling customer email through traditional email clients like Microsoft Outlook however, can impede your level of service and prevent you from reaching sales and service goals. Using a desktop email client, email communications are dispersed and isolated, and opportunities to manage, facilitate, and standardize customer interactions are practically non-existent. For example:
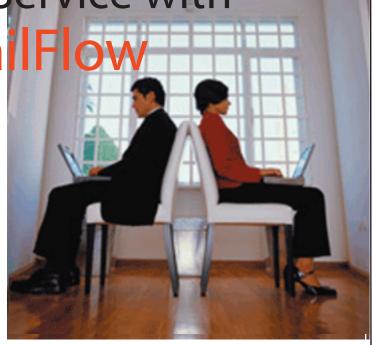
· When customer email inquiries are delivered to an agent's desktop email client, managers are unable to monitor response time or response quality.
· Without the ability to monitor customer email inquiries, managers are unable to balance workload as the volume of inquiries grows.
· Agents are unable to draw from a library of standard responses to common questions and instead, must compose a response for every customer email inquiry.
· Without standardized responses or the ability to monitor agent response, organizations risk inaccurate, inconsistent responses to customer inquiries as well as overall response times that fall outside company service directives.
· Finally, customer email inquiries dispersed among agent desktops cannot be aggregated to provide a cohesive history of contact.

VisNetic MailFlow-powerful, affordable email management software-offers a comprehensive solution to these challenges of modern email-based customer interaction. It allows organizations to:

· Answer customer inquiries quickly and efficiently, despite potentially high volumes of email
· Answer customer inquiries accurately, with information relevant to the customer's needs
· Meet established customer service goals, and inform continuous improvement efforts with business intelligence gathered from customer/agent dialogue
· Build and sustain lasting relationships with your customers by putting a complete contact history at your agents' fingertips

VisNetic MailFlow accomplishes all of this via an intuitive, easy-to-use, web-based interface. It combines affordability with fast, simply deployment capability and extremely low management burden. VisNetic MailFlow offers an incredibly compelling value to small-to-medium sized businesses whose customer email management needs have outgrown Microsoft Outlook.

To demonstrate how VisNetic MailFlow can empower your organization, this paper provides a brief, technical overview of how

VisNetic MailFlow receives, routes and tracks customer email correspondence. Included in the document is a description of VisNetic MailFlow's features and how each can be employed to improve customer service levels in your organization.

Getting Email Into VisNetic MailFlow

VisNetic MailFlow software operates independently of, and integrates with, your existing email service. Companies may use their own established mail server to send and receive customer email or leverage the email services provided by their ISP. In either case, VisNetic MailFlow will interoperate seamlessly with nearly any email server that supports POP3.

The VisNetic MailFlow service engine incorporates a high-capacity mail conduit, which is capable of retrieving email from (and sending email via) any number of mail server accounts. Email messages are stored in the VisNetic MailFlow database, and subsequently processed by the routing engine (more on this below).

VisNetic MailFlow offers tremendous flexibility in its interaction with mail servers, including:

· The ability to define any number of email message sources and destinations
· Robust support for attachments of nearly any type (MIME, QP, Base64, Binhex, uuencode, etc.)
· The ability to simultaneously send & receive email via multiple accounts
· POP3 message retrieval authentication (APOP protocol)
· SMTP message delivery authentication (CRAM-MD5 and LOGIN protocols)
· Ability to leave copies of email messages on the server as they are retrieved
· Configurable send & receive intervals (as well as manual triggers)
· Configurable connection properties, such as port settings, connection timeouts, etc.

- Powerful outbound message spooler with automatic retries, delivery failure notifications, automated bounce processing, etc.
- Antivirus scanning via the VisNetic AntiVirus Plug-in
- Maximum inbound and outbound message sizes, enforced at the transport level

In short, VisNetic MailFlow is a suitable, easily implemented email response management system for any organization currently receiving customer inquiries via email.

Routing Email Messages in VisNetic MailFlow

When an email message enters the VisNetic MailFlow system (and is subsequently stored in the database), the message gains the attention of the VisNetic MailFlow routing engine.

The routing engine's responsibility is to:

- Associate email messages with existing or newly-created tickets
- Route tickets (and associated email messages) to the appropriate destination (ticketbox) and optionally assign ownership to an agent
- Apply automatic processing, such as auto-reply, copy forwarding, or deletion

Any number of routing rules can be defined within VisNetic MailFlow; they are applied to an inbound message, in order of definition, until a routing rule effectively processes the message. If no routing rule is capable of handling an email message, that message is sent to a pre-defined, "unassigned" ticketbox to be processed by an agent at a later time.

Routing rules also include powerful text-matching capabilities, which can route messages according to their "To" and "From" email addresses, as well as email content, such as the message body, subject, headers, or a combination thereof.

By design, VisNetic MailFlow provides centralized handling and management of all customer email correspondence—a dramatic improvement over the traditional desktop email client. It's flexible yet comprehensive routing engine extends its functionality to include automatic distribution to appropriate personnel—shortening overall response time and enabling managers to more nimbly balance workload.

Tickets and Email Messages

The concept of tickets within VisNetic MailFlow reflects the natural course of customer interactions, in which threads of email correspondence comprise the experience customers have with your organization.

Company representatives (or agents) must be able to track customer correspondence in order to provide customers the kind of service they expect and demand. This is especially true when a customer has the potential to communicate with multiple agents within your organization.

VisNetic MailFlow solves this problem by organizing messages into logical tickets. Each ticket contains one or messages concerning a specific incident or dialogue with a customer. At any point, a history of communications with any user is available to any agent.

Further, VisNetic MailFlow tickets have a range of other useful features and properties, such as:

- Ticket status, which indicates whether the ticket is open, closed, on hold, etc.
- Ticket priorities, adjustable by inbound message priorities or set by routing rules
- Instant access to critical contact information, as well as communications history
- Ticket notes for private, internal use
- Powerful, integrated ticket search technology
- Flexible sorting and filtering mechanisms
- An integrated "trash can", which acts as a safety net for deleted tickets
- Ticket escalation; agents can "escalate" a ticket to a designated supervisor as needed

In addition, the messages that tickets contain are, in and of themselves, a robust construct within VisNetic MailFlow, allowing for:

- Inbound and outbound message attachments, with an ability to process nearly any attachment protocol
- Robust usability, similar to today's popular email client software
- Excellent flexibility; messages can easily be moved from one ticket to another
- Integrated spell-checking, to help ensure quality communications

Handling Tickets in Ticketboxes

The VisNetic MailFlow ticketbox is a powerful construct, providing the basic storage mechanism for tickets and their associated messages. Your agents will have the task of handling the tickets contained within various ticketboxes.

Any number of public ticketboxes can be created to organize the flow of email into your organization. Examples of public ticketboxes include "sales", "info", "support", etc.

From within public ticketboxes, any agent with proper permissions can assume ownership of tickets or answer messages directly (without taking ownership). Agents can also be assigned ownership of tickets directly by routing rules. Tickets owned by a specific agent will be accessible via the agent's "My Tickets" shortcut.

Ticketboxes also have a number of other very useful features, such as:

- Headers and footers can be automatically added to outbound messages
- Ticketboxes can send alerts to designated agents when contained messages reach a certain age
- The ability to send auto-replies, either immediately or based upon ticket backlog
- Require that agents use the "get oldest" feature, which effectively forces agents to answer oldest tickets first
- Send low and high watermark alerts, which can notify key personnel to minimum and/or maximum open ticket conditions

Another way that VisNetic MailFlow improves agent ticket-handling accuracy and efficiency is through the powerful Standard Response Library. This feature allows your agents to develop a categorized collection of effective responses to user inquiries, which can be inserted into outbound messages at any time. Agents may browse, select and insert an appropriate standard response in just a few keystrokes. Additionally, each agent's most frequently used standard responses are tracked automatically.

Agents, Groups, and Security

VisNetic MailFlow uses the concept of "agents" and "groups" to define the individual representatives of your organization and any groups of which they are members. Typically, a unique agent is created for each organizational representative.

Each VisNetic MailFlow agent has a unique set of preferences that they can customize, including:

- The current display theme, which provides the "look and feel" of the user interface
- Default maximum number of rows to display during searching, reporting, etc.
- Whether email message replies should "quote" the original message (and what quote prefix character should be used)
- Creation of arbitrary number of agent signatures (used in email messages), and designation of a default signature

Agents are automatically assigned to the "everyone" group when created, which provides them with a basic set of access rights within the system. Additional groups can be created, to which agents are assigned as members. Access rights can then be applied to entire groups, rather than specific agents, to ease administrative overhead.

Access rights can be customized to provide specific users and groups with a specific level of access to various system elements, such as ticketboxes.

A built-in group, called "Administrators", provides member agents with full access to administrative functions within the VisNetic MailFlow system. Administrators can create and delete users & groups, routing rules, etc.

Other VisNetic MailFlow security-related features include:

- IP address access restrictions, which can prevent agents from logging into the system from unauthorized locations
- Use of HTTPS (secure HTTP protocol) can be enforced, providing an extra level of security at the protocol level
- Session locking, which prevents an agent from logging in from more than one IP address

- Active session listing, which allows administrators to view agents with active connections (and their IP addresses)

Through administrative settings, an agent can also be required to use the "get oldest" button in any public ticketbox (this feature can also be engaged on a per-ticketbox basis). This helps to ensure that agents aren't selectively picking tickets from public ticketboxes based upon their contents.

LOWRANCE

Lowrance Electronics, Inc. has been a world leader in the design, manufacture and marketing of high-quality sport fishing SONAR and Global Positioning System (GPS) mapping instruments for almost 46 years. The company has established a global distribution network, encompassing over 1,500 domestic dealers, distributors, mass merchants and original equipment manufacturers in the U.S., as well as sales distribution outlets in 53 foreign countries. Additionally, the company maintains its own sales force in the United States, Canada, Europe and Australia, with product distribution centers located in the U.S., Canada and Australia.

Before implementation of VisNetic MailFlow, Lowrance executives did not have the ability to monitor sales inquiry volume or the level of customer service its staff provided in response to customer inquiries received via email. "We had multiple, public-facing email addresses and a dispersed staff assigned the task of sorting and responding to email inquiries," said Ken Anderson of Lowrance Electronics, Inc. "VisNetic MailFlow gave us the means to distribute email to appropriate departments, measure the volume of inquiries received, and track response quality and time."

Before VisNetic MailFlow, Lowrance customer service representatives accessed customer inquiries to various email addresses (e.g. sales@lowrance. com) using Microsoft Outlook. "Not only was this inefficient, it limited access to critical customer correspondence

to a few representatives," explained Anderson. "Furthermore, when reps were moved or reassigned, it became impossible to ensure adequate monitoring and response to email."

"From a technical viewpoint, we liked the fact that we could add a solid email management piece to our existing infrastructure, without having to replace our Exchange server," said Anderson. "That VisNetic MailFlow is web-based was also important to us. At Lowrance, we move our people around and, with VisNetic MailFlow, all they need is a username and password to get back up and running. The fact that our users immediately liked the web-based interface and functionality also helped smooth deployment."

For Lowrance, deploying VisNetic MailFlow to collect and route email eliminated inefficiencies and increased visibility of customer email correspondence, a critical first step to improving customer service levels. "Simply put, we needed statistics," stated Anderson. "Within hours of deployment, supervisors had enough information to adjust agent assignments, matching expertise to customer inquiries and balancing workload, and begin compiling a library of responses to more efficiently handle common inquiries."

"VisNetic MailFlow gave us the stats we needed and was the 'best bang for the buck'," continued Anderson. "We saw cost-savings before close of business the first day."

VisNetic MailFlow

Agents, groups, and security features combine to provide a flexible and secure working environment within VisNetic Mail-Flow, without sacrificing ease-of-use.

The Power of Contact Management

Each email message that's received by VisNetic MailFlow is associated with a contact; if a message cannot be correlated to an existing contact, a new contact record will be automatically created. This results in a centralized and highly integrated store of contact information within the system.

Contact records in VisNetic MailFlow are representative of your customers, each with their own unique characteristics. Each contact record in VisNetic MailFlow is defined by a combination of default and custom data fields (including private notes) that can be updated or merged at any time.

Contact records can also be "owned" by a specific agent, in which case all correspondence relating to the contact is (optionally) routed automatically to the owning agent.

VisNetic MailFlow also allows for powerful contact searching via a flexible range of criteria, helping you locate specific customer records whenever you may need them. Contacts can also be easily located during email message composition.

Reporting, Logging, and Alerting

VisNetic MailFlow strives to provide empowering information to agents, supervisors, and administrators through its robust reporting, logging, and alerting facilities. While managers seek to analyze the flow of business correspondence and increase accountability, system administrators require the means to expedite troubleshooting efforts and receive notification of important events.

VisNetic MailFlow supports a range of built-in reports that can provide valuable insight into the operational aspects of the system. Built-in report types include:

· Daily inbound and outbound email trend analysis
· Average number of messages per ticket, reported by day, week, month, or year
· History reports, which provide insights into the flow of email by ticketbox, agent, or contact

Reports can either be viewed directly on-screen, or exported for analysis within third-party applications such as Microsoft Excel.

VisNetic MailFlow also provides highly configurable and integrated logging facilities, allowing administrators the ability to fine-tune the type of information logged, as well as the level of detail.

Specific levels of log entry severity can be enabled for the various built-in log entry types. For example, system administrators can decide to log only warning, error, and critical-error event severities for all log entry types. The informational severity level could also be enabled for specific log entry types such as "outbound messaging" and "inbound messaging", which would provide more granular details about email server communications.

An integrated log viewer allows administrators to review captured log information, which can be filtered by log entry type and severity, as well as start time.

For system events that may require more immediate attention, VisNetic MailFlow provides powerful alerting functionality. System administrators can configure alerts to provide notification of important events, including:

· Low and high ticketbox watermarks
· Ticket age
· Product registration
· Low disk space
· Inbound and outbound message delivery
· General critical errors

Notifications can either be sent via internal means or to an external email address. Alert recipients can be designated as either agents or groups defined within the system. Internal alerts are made available via an "alerts" shortcut, where they can be viewed and eventually cleared.

Powerful Web-based Architecture

VisNetic MailFlow leverages the ubiquity of the Microsoft Internet Explorer web browser to provide a responsive, zero-footprint client interface to the system. Usability is advanced, yet intuitive and familiar, maximizing the productivity of new and experienced agents alike.

VisNetic MailFlow interoperates with Microsoft Internet Information Server (IIS).

This web server platform provides a stable and robust foundation upon which VisNetic MailFlow builds its powerful presentation layer.

Compatible database platforms include Microsoft SQL Server and MSDE (the Microsoft Data Engine). While the former provides a very scalable alternative and is in widespread use, the latter provides a free alternative for smaller organizations and can be easily upsized to SQL Server later if warranted.

Conclusion: Powerful Email Response

VisNetic MailFlow allows an organization to:

· Route, track, and process inbound email correspondence intelligently
· Reduce service and support costs through improved employee efficiency and productivity
· Super-service customers and maximize profit potential with enhanced email response quality and speed
· Gain important insights into the flow of communications throughout an organization
· Protect and secure critical business email correspondence with centralized storage and administration

When compared to traditional CRM solutions, organizations will find VisNetic MailFlow:

· Extremely affordable
· Incredibly easy to deploy and configure
· Very low management burden
· Extremely intuitive end-user interface (no training required in most cases)
· Free 30-day trial period makes it easy to "try before you buy"
· Provides an immediate and clear return on investment

VisNetic MailFlow is a one-time, license-based software solution. Pricing is based on number of users and is scaled to fit the financial needs of any organization. License sizes range from 3 users, at $540.00 US, to an unlimited number of users for $20,000.00 US. VisNetic Mail-Flow is developed by Deerfield.com and available for purchase from Deerfield.com or any Authorized Deerfield.com Reseller.