CALL VOLUME & HANDLING

Creating a phone plan: IVR/Voicemail Abandon

How many options are offered within the IVR?	More than 4	Less than 4
	❑ Reduce to 4 or less	No change
How long does it take before reaching a live person?	Longer than 30 seconds	Less than 30 seconds
	❑ Improve to less than 30 seconds	No change
Does the IVR include an option to speak to a live person?	No	Yes
	❑ Update to include option for operator or receptionist	No change
Do the IVR options direct customers to the correct departments?	No	Yes
	❑ Update routing as needed	No change
Are voicemail greetings short?	No	Yes
	❑ Include name and department, keep greeting concise	No change
Is the option to take a message offered vs transferring to voicemail?	No	Yes
	❑ Train staff to offer to take messages and collect relevant customer information to deliver good customer service upon call back	No change
Are voicemail boxes set up properly to receive messages? And are they monitored and maintained?	No	Yes
	❑ Work with staff to set up voicemail greetings ❑ Establish guidelines for maintaining voicemail boxes	No change

Marchex

(800) 840-1012 | contactus@marchex.com

CALL VOLUME & HANDLING

Creating a phone plan: Ring Transfer Abandon

	No	Yes
Are calls transferred using a warm transfer method?		
	❑ Warm transfer to available staff vs. ringing desks ❑ Ensure calls are connected to someone who can assist the customer	No change
Are calls transferred to the correct individuals or departments?	No	Yes
	❑ Make sure staff has a current list of employees, extensions, departments and hours ❑ Consider a reference sheet for staff who helps support the phones during busy times	No change
Does staff offer to take a message?	No	Yes
	❑ Consider offering to take messages instead of transferring or sending a call to voicemail.	No change
Do calls route back to the receptionist after three rings?	No	Yes
	❑ Set the phone system to route calls back to the receptionist if not answered after three rings ❑ Consider back up plan/call routing for busy times. Identify who else can help manage calls/take messages	No change

CALL VOLUME & HANDLING

Creating a phone plan: Unanswered Calls

Are customers reaching the correct destination?	No	Yes
	❑ Check numbers in the Campaign Listing for accurate routing. Check website, business listings and any advertising campaign numbers.	No change
Are the phone extensions set up and configured correctly?	No	Yes
	❑ Make changes to correct any issues and make sure routing is accurate	No change
Is the phone system able to handle several calls at once as well as peak call volumes?	No	Yes
	❑ Increase phone lines/capacity ❑ Check hours of day observations to see your dealerships busiest times	No change
Does the reception staff work times that align to program hours?	No	Yes
	❑ Adjust receptionist/or available staff to align with program hours ❑ Consider if Service is open before Sales, and if messages can be taken	No change
Is there proper staffing to mange inbound call volumes?	No	Yes
	❑ Review staffing for coverage during peak hours, lunch and breaks ❑ Check hours of day observations to see your dealerships busiest times	No change

CALL VOLUME & HANDLING

Creating a phone plan: Hold Time Abandon

Is the staff that takes calls knowledgeable about your products and services?	No	Yes

	❑ Work with staff to make sure they understand their area of specialty:
	  ❑ Sales: Current inventory, product knowledge; similar models, etc.
	  ❑ Service: Hours of service, transportation options, anticipated RO times, etc.
	❑ Match new team members with more senior staff for training and coaching
		No change

Does the staff offer to call customers back versus having them hold?	No	Yes
	❑ Offer to take the customers information and phone number for a return call, versus placing on hold	No change
Do you have guidelines regarding reasonable /expected wait times?	No	Yes
	❑ Route calls that have been waiting longer than a predetermined length of time back to the receptionist ❑ Offer to take a message ❑ Consider staffing during high traffic and busy times of the day	No change