

# Location Insights

QUICK AND EFFICIENT FIELD ENGAGEMENTS

## Geo-Assignment

In a world constantly on the move, how do you keep pace with customer demands?

It is a tough balancing act!

In one hand, customers are increasingly embracing digital means of communication ranging from text-based services, automated voice responses, self-service through internet and kiosks. At the same time, for important and urgent services we still prefer human interactions, and often insist on face-to-face meetings. With time becoming increasingly scarce and commuting time increasing, the customers are no longer willing to visit you to resolve this issues. Rather, they expect your organization to come to them.

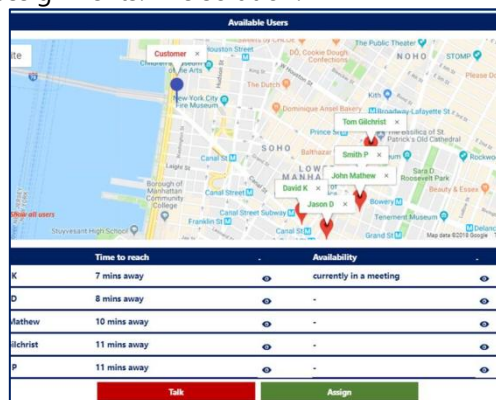
At times, the organization also acknowledges a personal meeting to be the best course of action. The chances closing a deal multiplies when you are the quickest to meet the customer, and the first to pitch your product. For urgent services, the quickness of response plays a very significant role for customer satisfaction.

### Fastest response with the best available resource?

The crucial requirement in effective interaction at the customer location is the ability to find the closest field resource with the best competence to handle the interaction. This is easier said than done!

C Centric's Location Insight helps you do just that. It enables you to identify the best qualified and available resource for the job and ensures immediate assignment. C Centric's location Insight solution integrates with your customer-management processes and streamlines location-based assignments. The solution:

- Shows all field force available for the job
- Recommends the resources based on the competence, skills or any other qualifying parameters
- Shows distance and time to reach the customer destination on a real-time basis
- Considers the current appointment while recommending availability.
- Allows you to call the field personnel, discuss the requirement and then assign.
- Sends assignment details to the to the field user immediately and tracks progress



| Available Users |               |                        |
|-----------------|---------------|------------------------|
|                 | Time to reach | Availability           |
| K               | 7 mins away   | currently in a meeting |
| D               | 8 mins away   |                        |
| Matthew         | 10 mins away  |                        |
| Christ          | 11 mins away  |                        |
| P               | 11 mins away  |                        |

Use our solution for

**Emergency services**

**Field Sales Mgmt.**

**Survey Mgmt.**

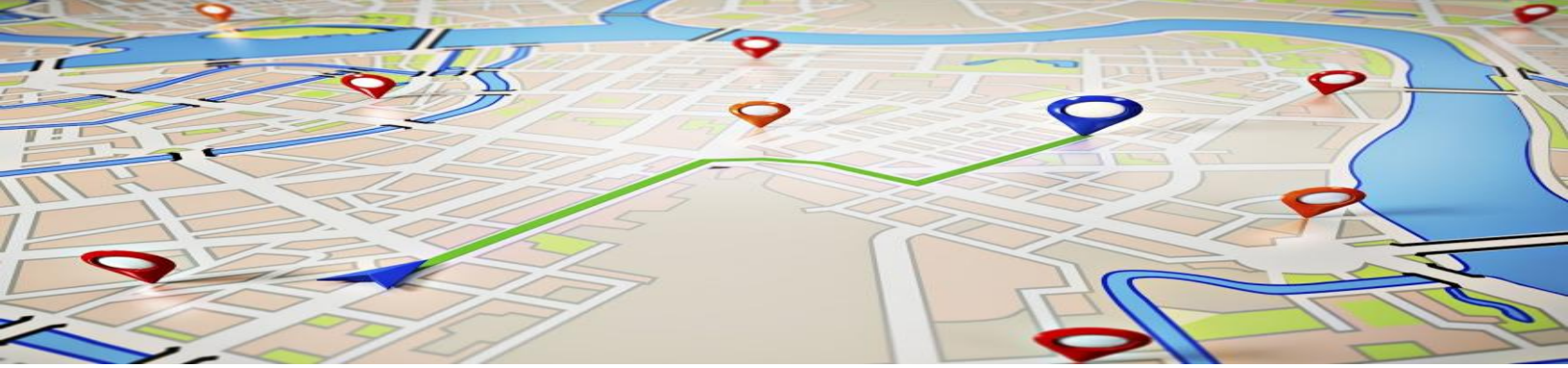
**Ad-hoc service requests**

**Break-down services**

**Collection Mgmt.**

## Advantages

- **Flexible and extensive rule set-up**– the rules to ascertain the best person for a field requirement can be very complex. Our system allows definition of complex multi-layered rules through a very simple interface.
- **Versatile and extensible** – the solution works on any entity & any business process. Can be configured for sales processes, service management, scheduling breakdown or emergency services, allocate to collection agents and surveyors etc.
- **Real time collaboration**– allows real-time communication between the field, the central team and the customer. The central team can initiate a conversation with the field user right from inside the app. The customer is also updated on a regular basis
- **Ready extension to our CRM solution**– this is a bolt-on to our CRM solutions built on Dynamics CRM 365, and PowerApps Platform from Microsoft.
- **Tested and certified** – Our solutions are certified at the highest level of quality certification for partner solutions of Microsoft.



# Route Planning

## REAL-TIME, FASTER & EFFECTIVE ROUTER PLANNER

As a sales representative or service provider, you have to attend multiple appointments or accomplish assigned tasks in a day. Without planning the route of your activity visits, it may result you spending more time in travelling rather than investing that time with the customer.

CCS Route planning helps to plan your route in more effective way. It plots the address of your customers on the map and provides multiple route plans and gives you privilege to select route based on your requirement.

- **Scheduled Sequence:** You can visit your appointments in the order of their schedule time
- **Optimized Sequence:** You can use optimized route plan of your appointments
- **Custom Sequence:** You can change the order of your appointment sequence

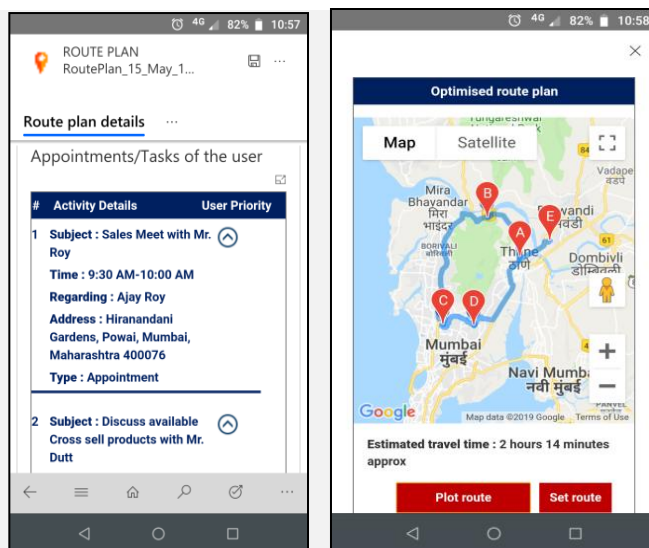
It helps you to choose shorter route and customize the sequence of your appointments. You can save multiple starting points of Home, Office and use any one as your start place for appointments visits. Unforeseen appointments can occur, you can change the appointment schedule on the go without wasting any time. It makes the life of field representative easier as it provides the route plan just by pressing a button on desired route plan, which helps him to achieve the best out of it.

In outside sales, service, and consulting, you would not want to stick to one fixed plan, as you may want to change your schedule if there occurs any unplanned circumstances. Even if there is change in the appointment schedule or your start place, you can override the existing route plan and create a new one with latest appointments/tasks being reflected in your route plan.

### Advantages

- **Overview of route** – It gives broad idea to field user about the route which he has to follow to complete his appointments for a day.
- **Reduced drive time** – Field user can choose the optimized route which reduces his drive time and can start from his home and follow the route and return to office after finishing all appointments.
- **Flexibility of defining route plan** – Even if there are changes in the appointment schedule, user can update the route plan.
- **Customer satisfaction & Better services** – When the user's route is planned, he shows at the location on time and finishes the meeting before time. He can extend meeting and try to engage him with newer services.
- **Dynamic route selection** – If user has opted for sequence appointment route plan, and due to some uncertain changes in schedule of some planned visits, he can switch to custom route plan.

- Creates route plan and fetches all appointments/tasks scheduled for the day
- Plots the route based on the locations of activities and enables to set the desired mode of route
- Shows the estimated travel time
- Shows the activity information on plotting
- Enables to change the route plan if there are any sudden changes in the schedule

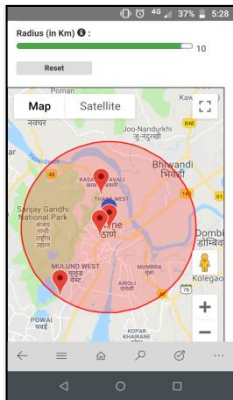




# Near To Me

While on the move, you may want to find the nearest customer whom you can pitch new products or you may want to look for customers around to provide service on completing the existing assignment early. It also works for custom entity and enables the user to locate nearest Branch or discover different vendors to purchase equipments/machines.

CCS Near-To-Me helps to locate the nearest leads, contacts, customers or any custom entity and plots them on the map. It considers the user's current location and enables you to look for Near-By opportunities/customers through which you can improve customer relationship and bring productivity for your organization.

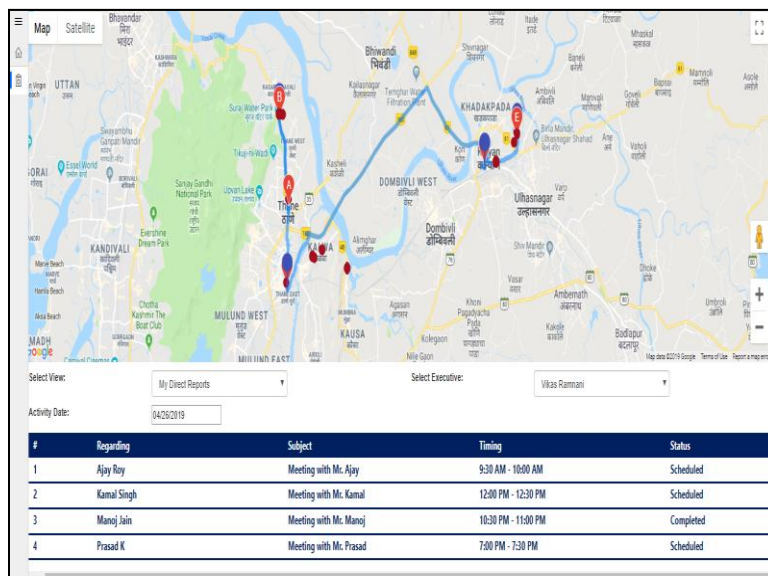


- Displays the list of entities for which Near-To-Me is enabled
- Plots the entity records on the map which are near to user (within the radius specified)
- Shows the entity record name, phone, etc. details on plotting
- Using phone number, it can redirect to the phone dialer and create a phone activity in application

# Route Monitoring

CCS Route Monitoring helps you track the whereabouts of your field representatives, anytime, anywhere. It helps you get real-time location information on your field executives. You can not only track the route but also see the scheduled activities.

It provides the information about the appointment purpose, time, status. Along with this, executives' Check-In time can also be tracked.



## Advantages

- **Quick View** – Can easily view the nearest opportunities from current location
- **Improve Productivity** - Engage new customers and cross products to existing clients
- **Real-time tracking** of executives helps increase accountability and productivity
- **Movement history** of executives helps assess their performance
- **Ready extension to our CRM solution**– this is a bolt-on to our CRM solutions built on Dynamics CRM 365, and PowerApps Platform from Microsoft.

- Shows the current location of the executives on the map
- Displays the executives reporting to the user
- Lists the appointments/task available for particular date
- Route plan made by the executive is shown on the map
- Information about the appointment, status are plotted on the map
- Executives' check-in details are captured and shown along with appointment details
- Shows the executives' location tracking which helps the user to identify route followed by the executive