Query Management System

Training Manual

March 2011
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Section 1

Introduction & Objective
Introduction & Objective

• Customers are increasingly demanding in today’s world and have high expectations when it comes to service delivery.

• Enhanced service delivery requires constant monitoring and effective management of overall queries received in our companies.

• Presently we do not have any particular application which can track all queries and issues received across teams, via different sources.

• These issues are tracked manually and the TAT for query resolution is dependent on manual measures which is difficult to monitor.

• Therefore it is imperative to have an application which
  • Records Queries
  • Measures delivery of response
  • Auto escalates unresolved complaints
  • Generates proper reports and MIS
Introduction & Objective

• Query Management System is a solution designed, which would allow fast and easy tracking of all queries & issues.

• It is an interactive query submission system which provides quick, easy and secure method of raising queries and getting appropriate solutions.

• Few highlights of the Application
  – User friendly interface
  – Multiple queries from all sources can be mapped in the application
  – Can be used by Internal & External Customers
  – Query routed directly to the relevant team responsible for resolution.
  – Auto escalation of queries
  – TAT can be monitored and constantly improved
  – Separate Reports and Analysis available
Section 2

Modes of Receipt of Queries
Modes of Receipt of Queries

• On evaluation, it was found that currently queries are raised by different sources by either of the following modes i.e.:
  – Emails
  – Calls
  – Chats

• Query Management System would be a centralised platform for receiving queries raised by different sources

• Franchisees, Branches & Head Office Representatives would be able to raise queries for existing customers as well as new prospective clients.

• Additionally, our registered Customers and IFA’s would be able to raise queries from our website using this application.
Section 3

Query SLA
What is an SLA

• SLA is known as Service Level Agreement. It necessitates standardization of query resolution where every team member involved in the query needs to adhere to a given TAT.

• End client always expects a resolution of his query in a given time
  – Eg: When you raise a change of tariff with your mobile service provider
  – Delivery of your pizza from Dominoes

• A SLA essentially captures:
  – Nature of Query
  – Time for resolution
  – Parties for resolution
  – Escalation mechanism
  – Closure obligation
Section 4

Login & Request Form
Login-Branches

- Branch users need to access url: [http://qms.jmfonline.in/](http://qms.jmfonline.in/) to login to Query Management Application.

- The login user name and password of branch executives would mailed by the CSD Training team *(As requested by the respective branches)*

- Incase a branch user forgets the login user id and password, you could drop a mail to Rahul from CSD Training Team on [rahul.sawant@jmfinancial.in](mailto:rahul.sawant@jmfinancial.in), who would assist with the same.
Login-Franchisees

- Franchisee users can access the application by clicking ‘Post Your Query’ link in single sign login through url [http://signon.jmfonline.in](http://signon.jmfonline.in).

**Login Screen**

![Login Screen](image1)

**Post Your Query Link**

![Post Your Query Link](image2)
Request Form-Branches/Franchisees (Form 2)

Note: In the above form in email id field, you could mention either the clients or your own email id, to which you want the query raised & closure confirmation mail to get triggered.
Section 5

Login links
Customers/IFA/Branch/Franchisee Links

- **Submit Ticket**
  - A new query/request can be raised through the link.

- **Status of Request**
  - All requests which have been raised would reflect under this link
  - Branches & Franchisees would be able to view separate ticket details in the listing view for multiple ticket numbers generated through the same request form
  - The multiple client codes for which the query has been raised will reflect in the listing view for easy identification of the client.

Note: Under ‘Status of Request’ link, branch users will be able to view only queries/requests which have been raised from their respective logins.
Customers/IFA/Branch/Franchisee Links

• Status of Request-------->Ticket Details
  – On clicking any particular ticket number from the listing view, the user can view complete details of the query raised, along with the updated responses received.
Section 6

Query Flow Process
Note: In the above workflow once a query is raised, the remaining activities can only be performed by a support representative at HO
Section 7

Escalations
Escalations – At HO

- Each query is mapped to a group at HO and has a resolution time (TAT) within which the query has to be replied and marked closed.
- Incase the query is not resolved within the TAT defined in the escalation SLA, the query would be escalated.
- Generally there are 3 escalation levels set for each query with Escalation Authorities and TAT mapped.
Section 8

Emails & Reports/MIS
On raising a request mail is triggered to the email id filled in the request form.

Branches and Franchisees should ensure that they mention the correct Client email while raising a request.

The time highlighted in the mail would reflect the Resolution time defined for the query within which the query should be resolved.

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Dear Anita Naidu,

Thank you for raising a request. The details of your query is as follows:

Support Request Details

Ticket No: 4

UCOR Code: 10310675

Problem Summary: Sec Market-Funds - Late Payment Charges - Request for Late Payment Statement

Problem Description: Please mail me the statement

Priority: High

Attached Files

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We will revert to you within 1 hour. In case your query requires further investigation and takes a longer time, we will keep you informed.

Alternatively you could login to our website and check the status of the query at your convenience.

At your service always,

Regards,

Customer Support Desk,

JM Financial Services

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This is an auto-generated email. Please do not reply directly to this email.
On query closure, a trigger is sent to the email ID filled in the request form confirming the client/franchisee the closure status.
So ....

Are you ready to start