B▪LDCHAT® by LogMe**In**®

Case Study

Using Email Management
to Streamline Workflow

EXAMPLES: SalesNexus & SendThisFile

Two Mini-Case Studies of Email Management

Introduction

Managing email inquiries is a problem many companies simply don't realize they have. An inability to manage inbound emails causes organizations to miss sales opportunities and deliver poor service to existing customers.

BoldChat customers effectively utilizing Email Management are able to simply and effectively route emails into the correct workflow. This document illustrates two typical case studies of customers who use Email Management in their daily operations.

About SendThisFile.com

SendThisFile allows its customers to send and receive files too large for email, to and from anyone, anywhere in just a few simple steps. The company launched in October 2003 and today has over a million users with over 36 million files sent.

The Problem:

The company, with an email volume that often reaches 500 incoming messages per day, had difficulty managing the volume of inbound emails. SendThisFile decided to outsource the first level of support, general inbound inquiries from customers. BoldChat provided a solution to manage these emails.
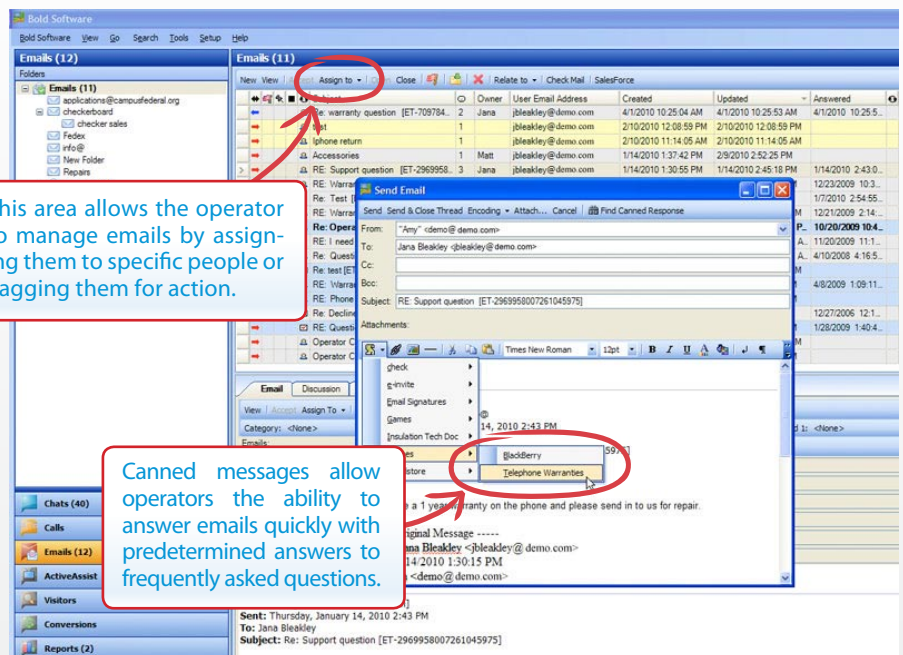
The Solution:

Using BoldChat's email management tool, agents can quickly and efficiently respond to messages thanks to canned messages and automatic message threading. Says SendThisFile's CFO, Michael Freeman, "[Automated threading] is a godsend."

For inquiries that require level two support, agents assign them accordingly and the support team at SendThisFile is able to quickly take ownership of the requests.

The Results:

• Emails sent to SendThisFile are responded to within the same business day. "Customers tell us they're surprised how quickly they hear back from us," says Freeman.

This area allows the operator to manage emails by assigning them to specific people or flagging them for action.

Canned messages allow operators the ability to answer emails quickly with predetermined answers to frequently asked questions.

About SalesNexus:

SalesNexus is a web based contact management software solution designed for sales people, sales management, and marketing professionals. The company, founded in 2002 by Craig Klein, a seasoned sales executive, is built on the premise that businesses win when their sales staffs implement best practices through efficient contact management.

The Problem:

SalesNexus, with over 3,000 customers, used to forward support inquiries to five different agents. Without clear ownership of each message, agents were never sure if an email had already been replied to, often translating to multiple replies or, even worse, no reply at all.

The Solution:

SalesNexus now relies on BoldChat's Email Management tool to manage inbound emails to their support team. "The fact that we can track an email chain is huge for us," says Bill Treat, SalesNexus's Support Manager. "In the past, I would end up forwarding emails to another tech. With BoldChat, they can see the whole email chain and it's so easy to use."

SalesNexus also utilizes BoldChat's email canned messages feature. "We get a lot of repeat questions from new users. If I had to type out every email response for a

very basic question, that would eat up a lot of my time. Canned responses allow us to give clear answers to common questions without wasting time," Treat said. But the biggest improvement SalesNexus has seen since implementing BoldChat is the lack of missed emails. "Now we know for a fact when something has been responded to. Our response time has gone up, but the biggest improvement is we no longer miss emails."

The Results:

• Through BoldChat reporting, SalesNexus is able to display their impressive customer response and resolutions times via Voicemail, Email and Chat.

• The sales team is given a clear stream of communication from beginning to end with each email thread and is encouraged to compare their results with the results of team members.

BOLDCHAT

BoldChat is a market-leading live chat solution enabling businesses to quickly and effectively engage visitors on their websites. BoldChat is offered in different editions and includes other integrated communications technologies like click-to-call, co-browsing, email management, SMS management, and Twitter management. Organizations of all sizes – from small proprietorships to large ecommerce enterprises – can drive more conversions and higher customer satisfaction by using BoldChat.
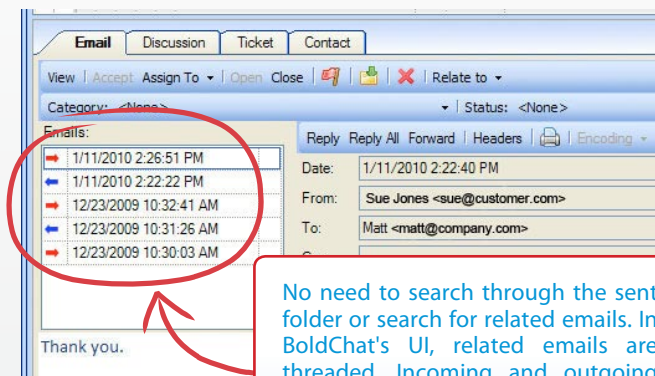
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Chat with us, start a trial or download more resources like this one at: **www.BoldChat.com**

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No need to search through the sent folder or search for related emails. In BoldChat's UI, related emails are threaded. Incoming and outgoing emails are color-coded and the agent can quickly click each individual item to view a part of the email thread.