Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Inside Sales

Sales Staff Extension · /staff/use-cases/inside-sales

How inside sales teams use the Staff extension to efficiently process phone and email orders.

Scenario

Company: Office Supplies Wholesaler
Sales Team: 8 inside sales representatives
Location: Centralized call center
Customers: 1,200+ B2B customers
Daily Orders: 50-80 orders
Average Order: $800

Challenge

Inside sales reps need to:

- Handle high volume of phone orders
- Process orders quickly and accurately
- Access any customer account
- Apply discounts and special pricing
- Track commission per order
- Meet daily sales targets

Solution

Staff Setup

Staff Group: Inside Sales

Staff Configuration:

- Access All Customers: Yes
- Can Edit Item Price: Yes
- Can Create Customer: Yes
- Commission: 4%
- Session Lifetime: 7200 seconds (2 hours)

Workstation Setup

Equipment:

- Dual monitors
- Headset
- High-speed internet
- CRM integration

Browser Bookmarks:

- Staff login

- Customer search
- Product catalog
- Order history

Typical Workflow

Incoming Call

Step 1: Answer Call

```
"Thank you for calling [Company], this is [Name], how may I help you?"
```

Step 2: Identify Customer

- Ask for company name or customer ID
- Search in staff dashboard
- Verify customer details

Step 3: Start Customer Context

- Use the customer login action (tooltip: "Login to this account")
- Access customer account
- View order history

Order Processing

Step 4: Take Order

- Customer reads product codes
- Search and add products to cart
- Verify quantities
- Check inventory availability

Step 5: Apply Pricing

- Check customer's pricing tier
- Apply volume discounts
- Edit prices if needed
- Apply coupon codes

Step 6: Review Order

- Read back order summary
- Confirm shipping address
- Verify payment method
- Calculate total

Step 7: Complete Order

- Proceed to checkout
- Place order
- Note order number
- Confirm commission

Step 8: Confirmation

```
"Your order #[NUMBER] has been placed.
Total: $[AMOUNT]
Expected delivery: [DATE]
You'll receive a confirmation email shortly."
```

Step 9: Exit Customer Context

- Click "Logout from current customer"
- Ready for next call

Email Orders

Process:

1. Read customer email
2. Search customer
3. Login as customer
4. Add products from email
5. Apply pricing
6. Place order
7. Reply with confirmation

Metrics (What You Can Measure)

Typical metrics you can track from staff-linked orders and commission data:

- orders placed per staff member
- sales volume per staff member / team
- commission totals (if enabled)
- average order value

Benefits

For Sales Reps

Efficiency:

- Quick customer access
- Fast order entry
- Real-time inventory
- Instant confirmation
- No paperwork

Productivity:

- More orders per day
- Shorter call times
- Fewer errors
- Better accuracy
- Higher satisfaction

Earnings:

- Clear commission tracking
- Daily earnings visible
- Performance comparison
- Goal achievement

For Management

Monitoring:

- Real-time dashboard
- Individual performance
- Team performance
- Orders placed
- Sales value and average order value

Quality Control:

- Order accuracy
- Pricing compliance
- Customer satisfaction
- Response times
- Error rates

Reporting:

- Daily sales reports
- Commission reports
- Performance rankings
- Trend analysis
- Forecasting

For Customers

Speed:

- Fast order processing
- Immediate confirmation
- Quick turnaround
- Efficient service

Accuracy:

- Correct orders
- Accurate pricing
- Proper shipping
- Clear communication

Key Features Used

1. **Access All Customers**: Handle any customer call
2. **Customer Impersonation**: Quick order placement
3. **Price Editing**: Apply discounts and special pricing

4. **Commission Tracking**: Monitor daily earnings
5. **Order History**: View previous orders
6. **Quick Search**: Find customers fast

Tools & Technology

CRM Integration

Connected Systems:

- Customer database
- Call history
- Email integration
- Notes and comments

Benefits:

- Complete customer view
- Interaction history
- Follow-up reminders
- Performance tracking

Phone System

Features:

- Caller ID integration
- Automatic customer lookup
- Call recording
- Queue management

Knowledge Base

Quick Access:

- Product information
- Pricing rules
- Shipping policies
- Return procedures
- FAQ

Training Program

New Hire Training

Week 1: System Training

- Staff login and navigation
- Customer search
- Product catalog
- Order placement
- Price editing

Week 2: Process Training

- Call handling
- Order processing
- Problem resolution
- Quality standards
- Performance metrics

Week 3: Shadowing

- Listen to experienced reps
- Practice orders
- Receive feedback
- Build confidence

Week 4: Live Calls

- Handle real calls
- Supervisor monitoring
- Performance review
- Ongoing coaching

Ongoing Training

Monthly:

- New product training
- System updates
- Best practices
- Performance review

Quarterly:

- Advanced techniques
- Sales skills
- Customer service
- Goal setting

Best Practices

Call Handling

Professional:

- Friendly greeting
- Active listening
- Clear communication
- Accurate information
- Courteous closing

Efficient:

- Quick customer lookup
- Fast product search

- Accurate data entry
- Smooth checkout
- Brief confirmation

Order Accuracy

Verify:

- Product codes
- Quantities
- Prices
- Shipping address
- Payment method

Double-Check:

- Order total
- Delivery date
- Special instructions
- Customer confirmation

Time Management

Prioritize:

- Answer calls promptly
- Process orders efficiently
- Minimize hold time
- Handle emails between calls
- Take scheduled breaks

Next Steps

- Field Sales Teams →
- Customer Service →
- Reports →