PROKEEP

Supporting Prokeep and Best Practices

Effectively Introducing a New Team Member to Prokeep

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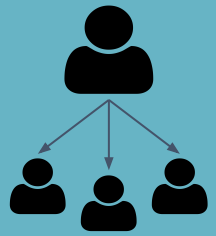
Show Value in Prokeep

Less Time On Phone

Accountability

Multitasking



Save Time

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Encourage Proper Use and Understanding

- ❑ Setup their account and make sure they have access
- ❑ Share information like the Prokeep Knowledge Base
- ❑ Making sure they know who they can go to with questions (Support or a team member with heavy usage)
- ❑ Share a webinar recap with them

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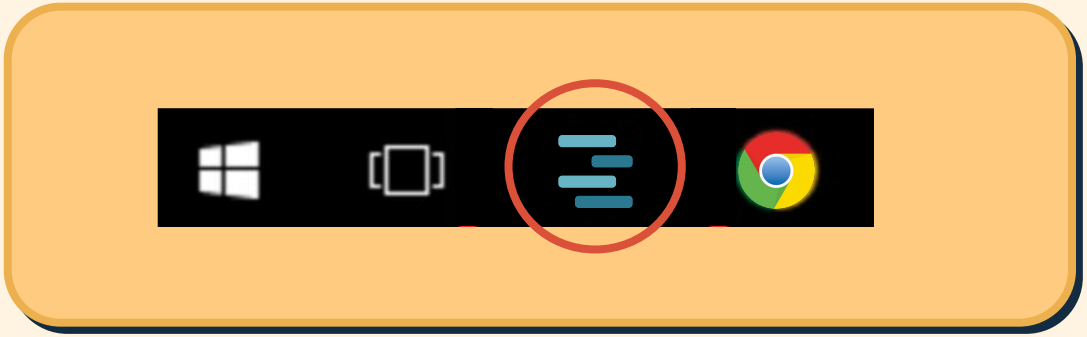
Drive Efficiency with Daily Use of Prokeep

Ensure Users Login Each Morning

- They will receive notifications each time a customer sends you a message. You must be logged in to receive notifications.

- To make this easier, you can save Prokeep as a desktop icon for them so they can easily access the platform every morning.



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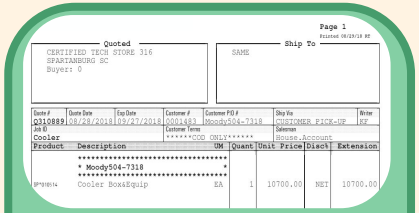
Teach What Works Better Over Text

- Make sure they understand what would work better as a text rather than a phone call

PO #555 is ready for pickup!

Here's the warranty info!


Page 1
Printed 08/29/18 RT

Quoted
CERTIFIED TECH STORE 316
SPARTANBURG SC
Buyer: 0

Ship To
SAME

Quote #	Quote Date	Exp Date	Customer #	Customer P.O #	Ship Via	Writer
Q310889	08/28/2018	09/27/2018	0001483	Moody504-7318	CUSTOMER PICK-UP	KF

Job ID	Customer Terms	Salesman
Cooler	******COD ONLY******	House.Account

Product	Description	UM	Quant	Unit Price	Disc%	Extension
	********** * Moody504-7318 * **********					
BP*0108514	Cooler Box&Equip	EA	1	10700.00	NET	10700.00

Your order #367 is confirmed and will be delivered tomorrow.

Your order just arrived!

Here's that part I want ID'd

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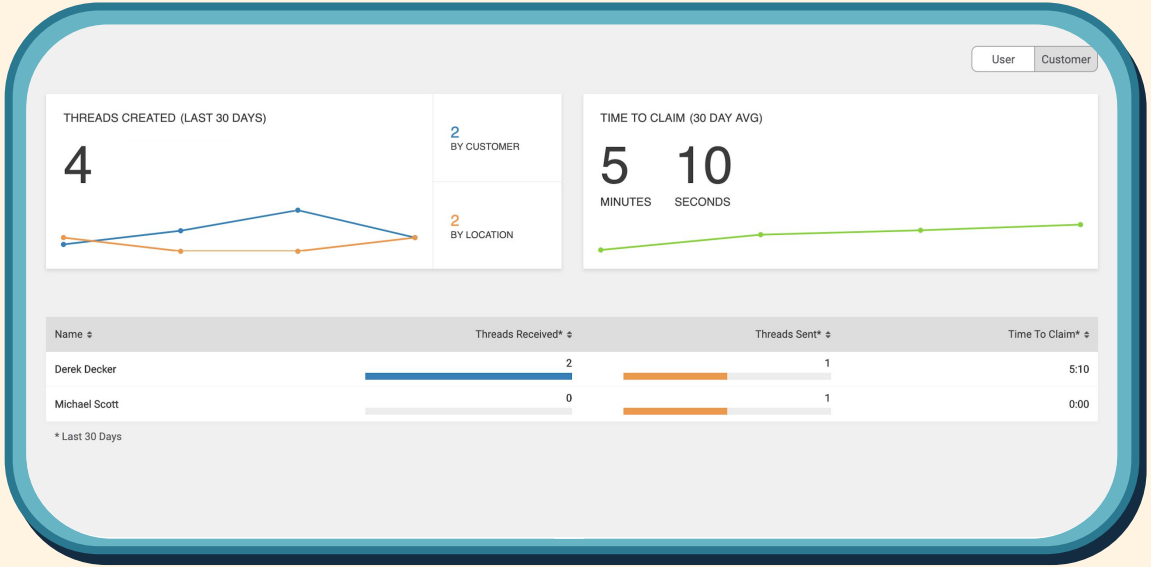
Monitor Progress Via Reports

- The reports section tracks many stats including a breakdown per staff member. Leverage this to track progress.



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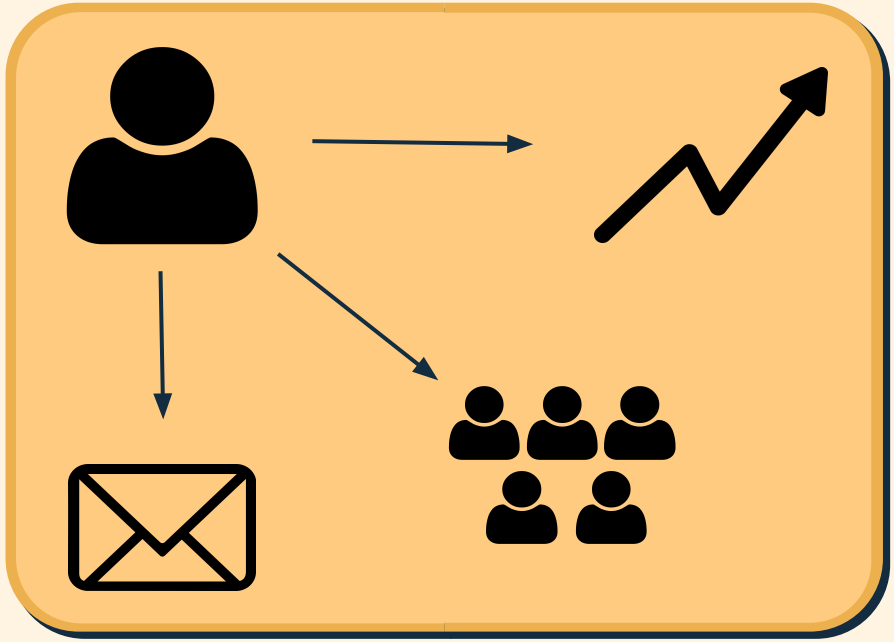
Assign a Team Member to Manage Prokeep

- Having a team member monitor Prokeep for Best Practices makes the experience of using Prokeep better for the whole Team.



Customer Awareness

- There are various ways you can make your customers aware that they can now text your landline!

Proactive Texting

Welcome Message

Flyers & Posters

Personal Text Via ProKeep

Changing Hold Message

User Best Practices - Daily Processes

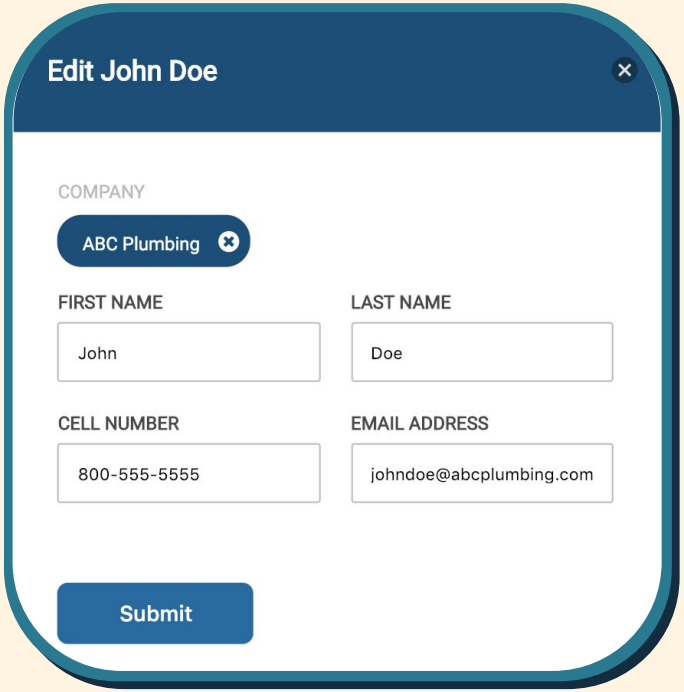
Users Are Responsible for Their Threads

- Users are responsible for completing each thread they claim or start.
- Thread ownership ensures each customer is serviced in a timely manner.

Enter Contact Info for Every Customer

- Once you add contact information to unknown phone numbers, everyone at your company will know which customer is sending you the order.

- This allows you to send your customer order updates or delivery updates through Prokeep later on.



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Send Updates Via Text

- You will save time by sending customers updates via text instead of using the phone.

Distributor

John Smith: PO #333 is ready for pickup

Great, I will be there later today for pickup, thanks!

John Smith: See you then!

Contractor

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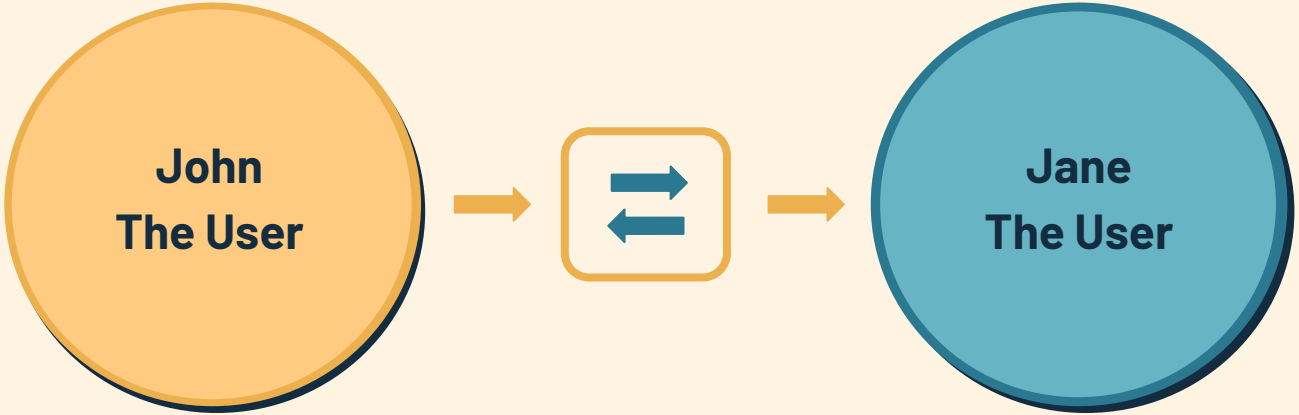
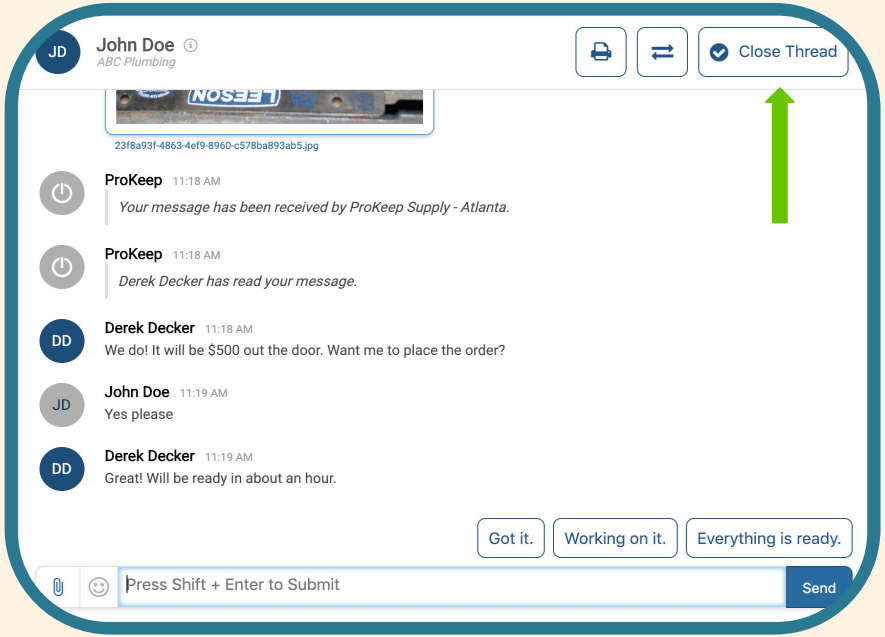
Transfer a Thread

- If you are not the best person to answer a message, transfer the message to another user better suited to help the customers.



Close Threads in a Timely Manner

- Closing a thread once the conversation is over will ensure everyone is notified the next time the customer needs help.



PROKEEP

Supported Browsers

Google Chrome

Mozilla Firefox

Microsoft Edge

Internet Explorer

PROKEEP

Menu:	Administrator	Manager	Member
Inbox	✓	✓	✓
Threads	✓	✓	✓
Contacts	✓	✓	✓
Reports	✓	✓	x
Search	✓	✓	✓
Settings:	**Administrator**	**Manager**	**Member**
My Account	✓	✓	✓
Preferences	✓	✓	✓
After Hours Message	✓	✓	x
Sharing Settings	✓	x	x
Users	✓	✓	x
Customer Import	✓	✓	x
Blocked Numbers	✓	x	x
Support & Feedback	✓	✓	✓

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Support and Feedback

Phone: (504) 226-7756
Email: support@prokeep.com