

09. Sample Request Management

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**Managing Customer
Needs**

Added Value

Why managing **Sample Requests** in CRM brings value?

- Common process & tool for sample requests
- Automated workflow that will reduce the number of “touch-points” for fulfilling a sample request
- Continuous improvement from an internal perspective
- Keep sample requests visible – can not get lost in email or systems that are not accessed routinely
- Provide a transparent process, anyone can see at any time where a request is.
- Provide the right information at the right time to the right person.
- Last but not least....a lean, easy to use tool

What you need to know to start...

The **4 main reasons identified to create a Sample Request** are:

- Quality
- Customer request
- Distribution
- Other Business purpose.

Once identified, **all sample requests will be created in the CRM.**

Depending on the reason it can be created from the Account (“Sold to” and “Sold to & ship to”), the prospect, the opportunity.

Sample management process is divided in 5 main steps:

- Creation
- Approval
- Processing
- Follow up
- Closure

These steps are reflected in the tool with the following image



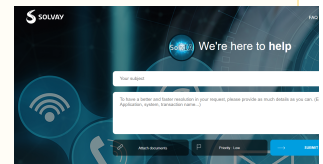
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Need Help?

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you can copy users with email address, default priority is Low, then Submit. We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example