



The Customer Satisfaction Index (“CSI”) module allows your shop to measure its performance with regards to customer feedback.

What is CSI? Customer satisfaction, a term frequently used in marketing, is a measure of how products and services supplied by a company meet or surpass customer expectation. Customer satisfaction is defined as "the number of customers or percentage of total customers, whose reported experience with a firm, its products, or its services (ratings) exceeds specified satisfaction goals.

In the competitive automotive glass repair and replacement marketplace where shops compete for customers, customer satisfaction is seen as a key differentiator and increasingly has become a key element of business strategy especially with networks and their insurance company partners. Within shops, customer satisfaction ratings can have powerful effects. They focus employees and technicians on the importance of fulfilling customers’ expectations. Furthermore, when these ratings dip, they warn of problems that can affect sales and profitability. These metrics quantify an important dynamic. When a shop has loyal customers, it gains positive word-of-mouth marketing, which is both free and highly effective. Therefore, it is essential for shops to effectively manage customer satisfaction. To be able to do this, shops need reliable and representative measures of satisfaction and that is what the CSI module in eDirectGlass delivers.

Adding CSI Questions

To setup your CSI questions, go to Administration->System Admin and select the Customer Satisfaction button at the bottom of the left sub-menu:

When you click on the Customer Satisfaction button, you can search for questions you have already entered to either edit the question or enable/disable it. To add a question, click on the Add Question button.

The screenshot shows the eDirectGlass software interface. On the right is a vertical menu titled "Administration" with a yellow "System Admin" header. Below it are buttons for "User Mgmt", "Parts Admin", "WO Codes", "Invoice Codes", "Reports", "QuickBooks Setup", "Bulk Invoice Notes", "Contact Export", "View Tax-ID", "Add Tax-ID", "Custom Logo", and "Customer Satisfaction" (highlighted in orange). The main area is divided into two sections. The top section, "Find CSI Question", has a text input field labeled "Question" and three buttons: "Find Question", "Add Question", and "Reset". The bottom section, "CSI Questions (New Record)", has an "Active" checkbox checked, a text input field containing "Would you use our company again for your windshield repair needs?", and two buttons: "Save" and "Quit Without Saving". A green "modified" status indicator is visible at the bottom right of this section.

Select whether the question will be “Active” or not and then add the question. Click the Save button to save the question.

When you are in a Work Order or Invoice, you can click on the “Customer Satisfaction” button in the sub-menu to fill in the answers, if delivered on a ticket/work order, or to review answers already provide previously. Remember to click on the Save button if you make any additions or changes.

YourFeedBackCounts - Customer Satisfaction Survey

	Yes	No
Did the technician show up on time?	☒	☐
Did the technician explain the service being performed?	☒	☐
Are you completely satisfied with the service and products we provided?	☒	☐
Are you likely to recommend our company to your family and friends?	☒	☐

Comments:

None

Save

Recoding CSI in Mobile Sales Center

If you are using the Mobile Sales Center or Technician Mobile Only Edition, your mobile employees have the ability to electronically record the CSI answers with the customer, at the time of the repair or replacement. When the technician or salesperson has completed the job and the customer has signed the order, the system will then display the CSI questions as the last step of the job.

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New Sales Order Complete

REMINDER:

Please send your inspection images:
1) To the following email address - 3740@edirectglass.com
2) Using [3178639](#) in the subject of the message.

YourFeedBackCounts - Customer Satisfaction Survey

	Yes	No
Did the technician show up on time?	☐	☐
Did the technician explain the service being performed?	☐	☐
Are you completely satisfied with the service and products we provided?	☐	☐
Are you likely to recommend our company to your family and friends?	☐	☐

Comments:

Save Survey

Create Another Sales Order

Simply have the customer answer “yes” or “no”, add any comments, and then click on the ‘Save Survey’ button.

Work Order Survey Reminder

You can have a survey reminder printed on the bottom of your work order. This reminder to take your survey contains a website link and survey code that the customer can use to complete your survey at any time. To enable this feature, go to Administration->System Admin. Check the 'Yes' box next to the line that reads 'Print CSI Link on WO?' and then click on the 'Save' button at the bottom.

When you print a work order now, the following will appear to the left of the 'Signature' area:

Please Take a Moment to Tell Us How We Did
Today at www.YourFeedBackCounts.com

Use Survey Code: 3193491

Signature



Date: 03/19/2013

You can also call and remind your customers to take the survey by simply telling them to go to www.yourfeedbackcounts.com and enter the work order number as the survey code.