

Customer Technical Support Process

Process for Welch Allyn Customer Care Center

The onsite site service model has been implemented for units whose PM Due Dates are on or after Jan 7th 2019. In all scenarios ship back to customer, never to service center.

Scenario 1 – Outside of Service Call

1. If the customer needs an accessory repair outside of when the PM is being performed, the customer would contact WA at 866-422-2220, select option 2 for technical support and then option 2 for devices
2. **Customer repair or accessory request** = Process as PIC repair or accessory replacement, direct with facility
3. **Offer loaner** if appropriate

Scenario 2 – During PM Service call

1. **Accessories** – FST order from HRC Direct per the updated Matrix
2. **Repair/RMA** – have FST call into 315-685-4414 option 2
3. **Offer Loaner** if available as we are NOT doing exchanges in the field for this contract

Scenario 3 – Customer Calling about PM Service

- Collect these 3 pieces of information (See [Appendix A](#) for how to search in the JDE Spreadsheet)
 - o Serial Number (Note: if <200704 this is a version 1 that is not on Smart Care)
 - o PM Due Date
 - o Customer Location
- Possible Customer Actions
 - o Serial Number Overdue: RMA to PIC
 - o Serial Number Not Overdue: Get their name/number and tell them SOM will reach out in 24-48hrs
- Every time you are going to email the AA and SOM what has happened and let them know if the PM Date provided by the customer – (email Template [Appendix B](#))
 - o SN Overdue: Email AA/SOM informing them that action was taken and they should revise their plan.
 - o SN Not Overdue: Email AA/SOM asking them to follow up with customer on when they can expect Service

Contact Designated Person for handoff of data update process

- If Serial Number is NEW
 - o AND location already exists – DCF to Add Process – See [Appendix C](#)
 - o AND Location is new – Add New Location Process – See [Appendix D](#)
- If Location is incorrect
 - o AND location already exists – Update Customer location Process – See [Appendix E](#)
 - o AND Location is new – Add New Location Process – See [Appendix D](#)

Appendix A

JDE Spreadsheet Overview

The screenshot shows the Hill-Rom spreadsheet with the Serial Number column selected. A red box highlights the filter search field, and a blue circle with the number 1 points to the down arrow next to the Serial Number header. Another blue circle with the number 2 points to the search field. A third blue circle with the number 3 points to the OK button in the dialog box.

Dialog Box Content:

- 200705474
- ☒ (Select All Search Results)
- ☐ Add current selection to filter
- ☒ 200705474
- OK
- Cancel

1. Collect the Serial Number from the customer first. Click the down arrow to active the filter search field for the Serial Number column.
2. Type the serial number in the search field to find that serial number.
3. Click OK

Hill-Rom

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Grifols Customer Contract Serial Numbers, PM Dates and Contact

Feb 1, 2019

8:00:04 AM

5

Names

6

8

7

Depot Indicator	Serial Number	Next PM Due Date	JDE Prod Model	Contract Number	Customer Account Number	Customer Name	Address Line 1	Address Line 2	City	State	Zip Code	Field Service Area	Area Admin	Area Vice President (AVP)	Field Service Territory	Field Service Operation Manager (SOM)	Field Service Center	Contract/Sales Area
GRIFOLS	200705474	09/12/2019	SPOT	463438	8527487	TALECRIS PLASMA RESOURCES GLENDALE	5048 W NORTHERN AVE STE 101		GLENDALE	AZ	85301	WESTERN AREA	Rache Reddis	LAMELLE, ROBERT A	PHOENIX TERRITORY	HANCOCK, DANIEL J	PHOENIX AZ HILL ROM SERVICE CENTER	AZ/KS/NM/LAS VEGAS

4. Compare the PM date provided by the customer to the date we have in JDE
5. Compare the Location provided by the customer to the location we have in JDE
6. Area Admin column tells you who to email the resolution
7. Field Service SOM tells you which SOM to email the resolution
8. If needed for escalations, include Area Vice President in email

COLUMN HEADER	DESCRIPTION
DEPOT INDICATOR	Indicates Grifols in JDE
SERIAL NUMBER	Serial Number
NEXT PM DUE DATE	Next PM Due Date
JDE PROD MODEL	Product Model in JDE
CONTRACT NUMBER	Contract Number, unique to each customer location
CUSTOMER ACCOUNT NUMBER	Account Number, unique to each customer location
CUSTOMER NAME	Customer Name
ADDRESS LINE 1	Customer Address Line 1
ADDRESS LINE 2	Customer Address Line 2
CITY	Customer City
STATE	Customer State
ZIP CODE	Customer Zip Code
FIELD SERVICE AREA	Field Service Area
AREA ADMIN	Area Admin to contact with updates
AREA VICE PRESIDENT (AVP)	AVP Name, responsible for whole Field Service Area
FIELD SERVICE TERRITORY	Field Service Territory, there are many territories in each Area
FIELD SERVICE OPERATION MANAGER (SOM)	SOM Name is aligned at the Territory Level, they are responsible for all Service Centers in their Territory
FIELD SERVICE CENTER	Field Service Center, there are many Service Centers in each Territory
CONTRACT/SALES AREA	Contract Area, Contract updates are aligned to this Sales Area

Appendix B

Email Templates

SN Overdue Email Template

To: SOM and Area Admin

Subject: Grifols Customer Acct # - Overdue Sent to PIC

Grifols Customer Account # XXXXXXXX located in XYZ location contacted the Customer Care Center today regarding <insert notes about what the customer asked for and any information you obtained regarding the PM Due Date>. Since the following Serial Numbers are overdue for service I have submitted to have loaners provided to the customer and will have them ship in their units to the Welch Allyn Depot for service.

Serial Number	Next PM Due Date
XXXXXXXXXX	Next PM Date
XXXXXXXXXX	Next PM Date

Please update your test kit schedule to account for these 2 units.

Thank you

<your name>

SN Not Overdue Inquiry Email Template - Mark with High Importance

To: SOM and Area Admin

Cc: AVP If second attempt

Subject: Grifols Customer Acct # - ACTION REQUIRED: Customer needs update

Grifols Customer Account # XXXXXXXX located in XYZ location contacted the Customer Care Center today regarding < insert notes about what the customer asked for and any information you obtained regarding the PM Due Date>. The customer is concerned regarding the following Serial Numbers coming due for PM service. Please reach out to the customer <name and contact number> as soon as possible to provide them an update on when they can expect service.

Serial Number	Next PM Due Date
XXXXXXXXXX	Next PM Date
XXXXXXXXXX	Next PM Date

Please see Grifols Process Documents on the Grifols SharePoint folder for a reminder of expectations.

Thank you

<your name>

Appendix C

How to use the Service Contract Data Collection Form (DCF)

Header

SERVICE CONTRACT DATA COLLECTION FORM (DCF)				
Contract # _____		Submitted Date: _____		
Account Number: _____		Contract Annual End date: _____		
Account Name: _____				
Service Manager: _____				
Model number	Serial number	Action	Reason	1st Search Date:

- Contract # - On Spreadsheet for known customers
- Account # - Customer Number On Spreadsheet for known customers
- Account Name – On spreadsheet for known customers
- Service Manager – **SOM**, on spreadsheet for known customers
- Submitted Date – Today's Date
- Contract Annual End Date – 8/31
- Model Number – Use what your system says is right for this SN not what is on the spreadsheet
- Serial Number – Provided by customer
- Action - Add
- Reason – Leave Blank
- 1st Search Date –Mark Last PM date xx/xx/xxxx

Footer

Date:	_____
Customer Name:	_____
Customer Signature:	_____
Title:	_____
Phone number:	_____
SOM Signature:	_____

- Date – Today's Date
- Customer Name – Provide your name
- Customer Signature – N/A if submitting electronically
- Title – WA Call Center Agent
- Phone Number – N/A
- SOM Signature – N/A

Submit to Contract Admin based on the Contract/Sales Area alignment, last column in spreadsheet

Contract Admin Contact Names

Territory Org Cd Desc (ch cl sc st ct cd)	Contract Admin
AZ/KS/NM/LAS VEGAS	Lance Levi
BIRMINGHAM	Trevor Drockelman
CHICAGO/WISCONSIN	Anne Nobbe
CO/OK/N TX	Peggy Clapp
GREAT LAKES	Anne Nobbe
IN/MI	Peggy Clapp
MIDSOUTH	Trevor Drockelman
MIDWEST	Shelia Lacy
NASHVILLE/ATL	Shelia Lacy
NONSERVING NE	Angel Pruitt
NONSERVING WEST	Angel Pruitt
NORTHWEST	Lance Levi
PHILADELPHIA/NY	Lucy Starost-Mayer
SO TEXAS	Angel Pruitt
SOUTHERN FL	Trevor Drockelman

Appendix D

Add new location

Review other locations on the spreadsheet to confirm the location does not exist. Note sometimes the city names can be different than the customer states, e.g., Whitehall, OH and Columbus, OH. Please check all parts of the address to ensure it does not already exist. If it does see Appendix E for updating address.

Contact Shelia Lacy and provide the following information

- Full Street Address
- All Serial Numbers at this location
- Last PM Date
- Customer Name
- Customer Phone Number

Appendix E

Update customer location

Contact Melissa Brewsaugh to update the last PM Due Date

- Providing the old customer location/ account number (if known)
- Providing the new customer location/ account number (if known)
- Serial Number to be updated