

Excellence in customer service: efficient customer rating & feedback loop

Aurore LESAGE • Functional Consultant & Customer Engagement



Introduction



The Odoo Style



Feature's possibilities



Demo



Conclusion











Introduction



The Odoo Style

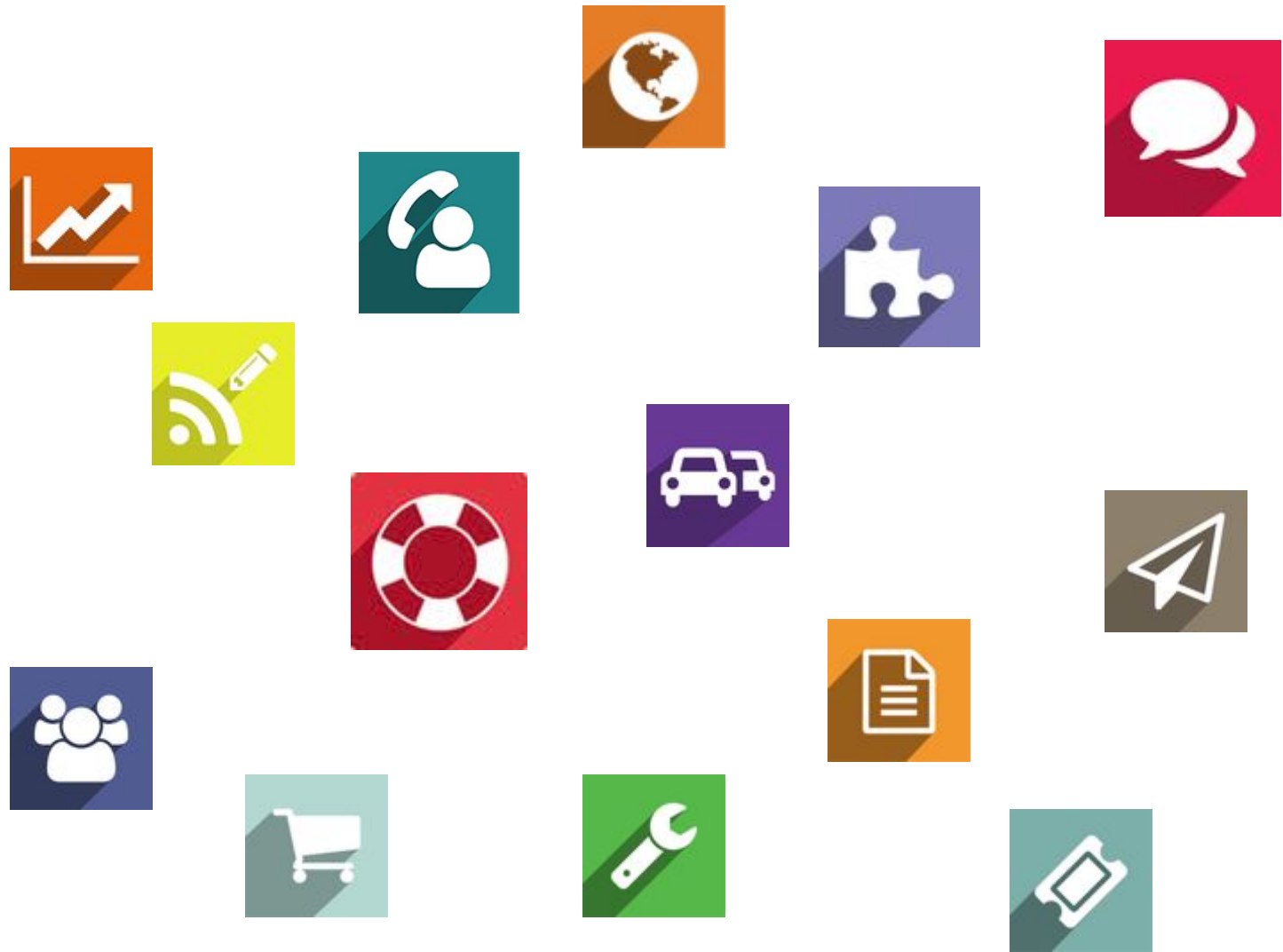
Customer Ratings

Rated User Search... Filters Group By Favorites

YourCompany, Administrator	YourCompany, Demo User
 YourCompany, Administrator by for Dataflow Design on 10/03/2016 21:33:16	 YourCompany, Demo User by YourCompany, Demo User for New portal system on 10/02/2016 21:35:04
 YourCompany, Administrator by YourCompany, Demo Portal User for Budget Planning on 10/02/2016 21:35:04	 YourCompany, Demo User by YourCompany, Demo User for Output incorrect on 10/02/2016 21:37:09
 YourCompany, Administrator by YourCompany, Administrator for Deploy and review on live system on 10/02/2016 21:35:04	 YourCompany, Demo User by Camptocamp for Add menus to the module on 10/02/2016 21:37:09
 YourCompany, Administrator by Delta PC for Modifications asked by the customer on 10/02/2016 21:35:04	
 YourCompany, Administrator by YourCompany, Administrator for User Interface design	

ADD NEW COLUMN

Easily analyzed thanks to the group by option.



Integrated everywhere

Templates / Task: Rating Request

EDIT CREATE

Attachment(s) Action

```
% set access_token = object.rating_get_access_token()
```



Satisfaction Survey

Hello,

Please take a moment to rate our services related to the task "**\${object.name}**" assigned to **\${object.rating_get_rated_partner_id().name}**.

We appreciate your feedback. It helps us to improve continuously.

Tell us how you feel about our service:

(click on one of these smileys)



\${object.user_id.signature or "| safe}

```
% if object.project_id.rating_status == 'stage':
```

Smooth communication thanks to emails

E-Learning Integration

Unpublished

Customer Satisfaction of Tasks

Last 7 days



Last 30 days



Last 3 months



Latest Feedbacks



Customer Satisfaction of Issues

Last 7 days



Last 30 days



Last 3 months



Latest Feedbacks



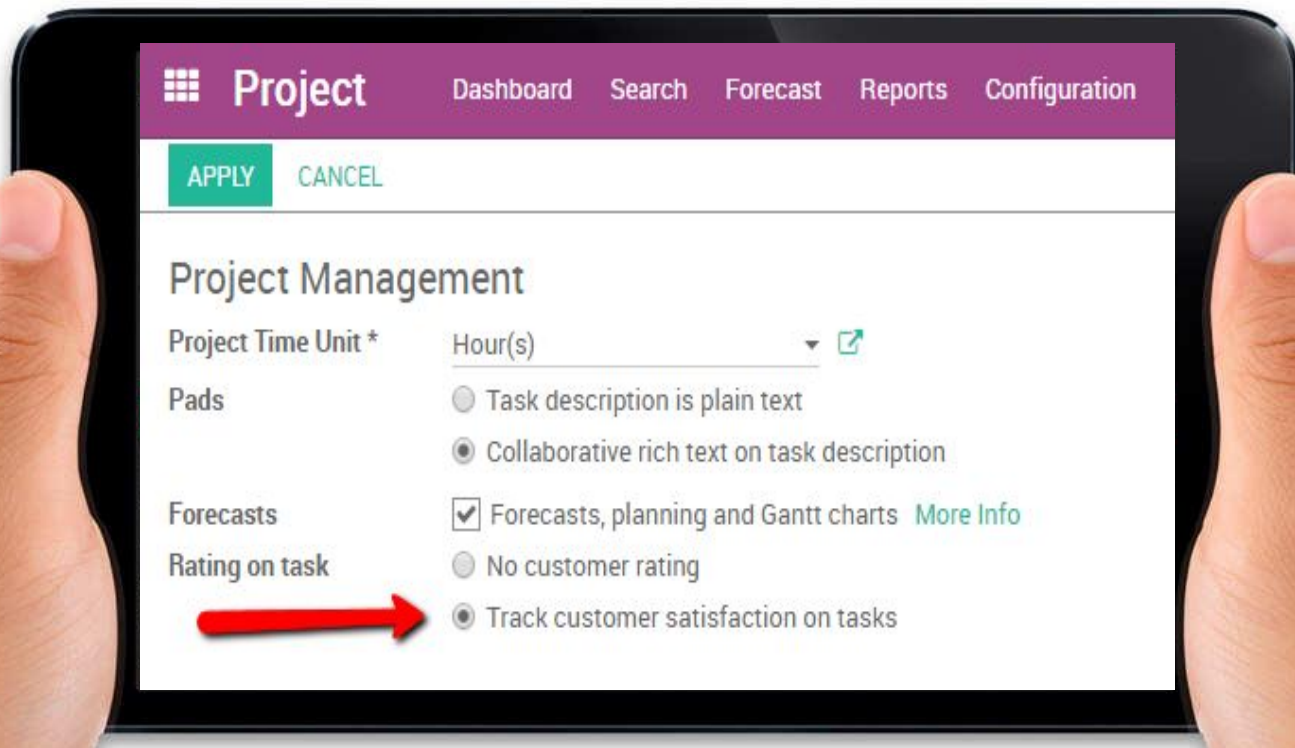
Clean public pages thanks to CMS



Feature's possibilities

Activate the Rating option

You can activate the option under your project's settings.
Rating on task - Rating on issue - or both - or none



E-Learning Integration

Tasks as Trainings

Issues as Feedbacks

Allow timesheets

Allow forecast

SETTINGS

Project Manager Demo User

Sub-task Project

Privacy

On invitation only

Visible by all employees

Visible by following customers

Customer

Customer(s) Ratings

Rating when changing stage

Periodical Rating

No rating

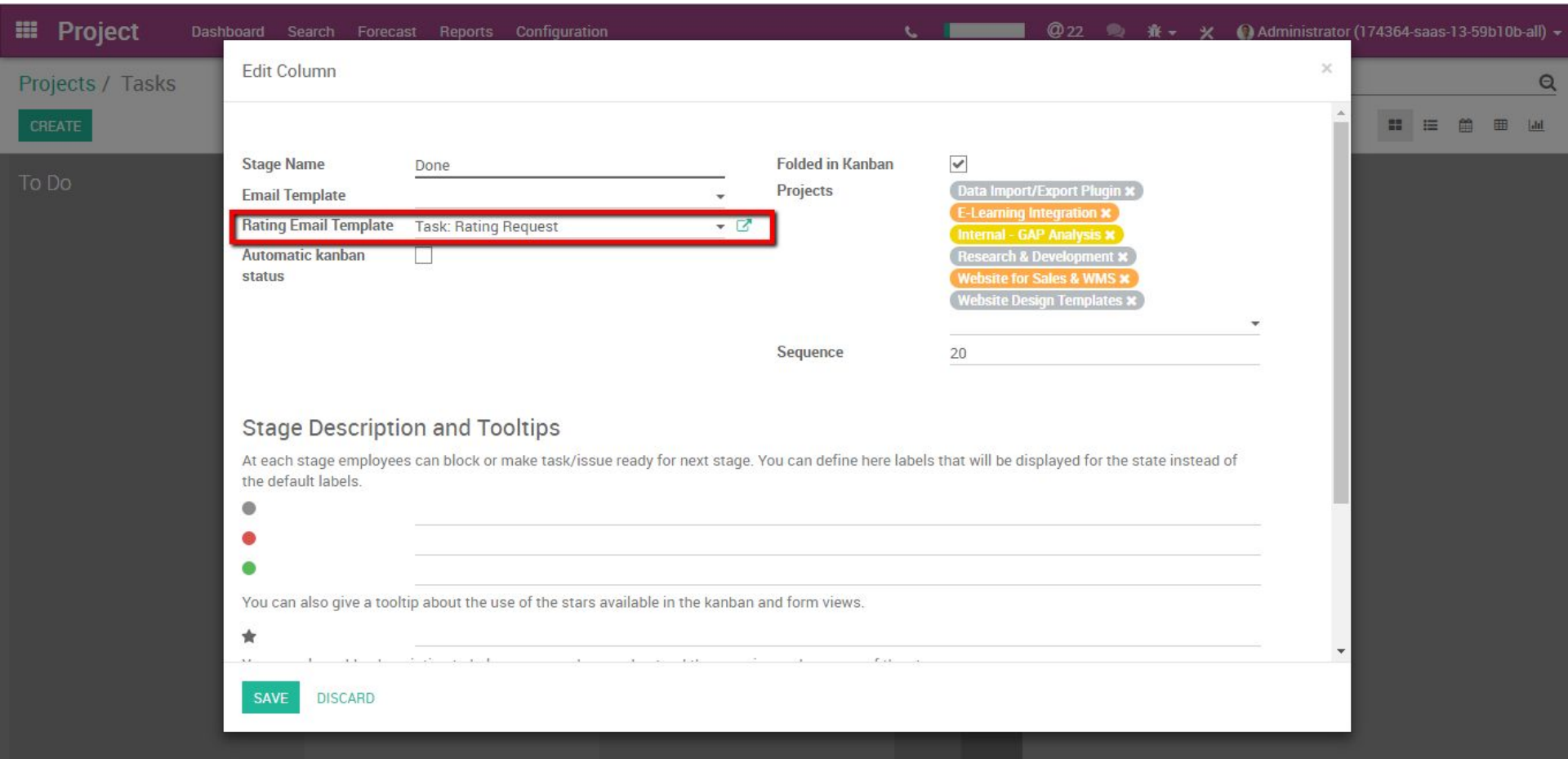
Edit project's stages and set an email template on the stages on which you want to activate the rating.

Rating Frequency

_____ ▾

Choose your rating option on your project's settings:

- Rating when changing stage
- Periodical rating (daily, weekly, twice a month,...)
- No rating



Associate feedback email to your stage



Demo



Conclusion

Customer satisfaction rating

Without Odoo

1. Close your ticket
2. Export customers' email
3. Send the survey
4. Collect the answers
5. Link the answers to the right ticket
6. Analyze information
7. Update the customer satisfaction webpage
8. Done!

With Odoo

1. Close your ticket
2. Analyze the answers
3. Done!

Thank you.



#odooexperience