



FAQ's

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General Information

1. What is OPEN-LINE?

OPEN-LINE is a unique SaaS (software-as-a-service) offering from IBRC, Inc. It's a simple-to-implement and simple-to-use online tool that proactively solicits feedback from your customers (or members, constituents, etc.) via email and the web and lets you monitor, oversee, and improve every customer's individual "state of experience."

2. How does OPEN-LINE work?

On a periodic basis, according to a schedule you define, OPEN-LINE sends email "check-ins" to your customers asking one simple question: "Are you experiencing any problems?" If yes, the customer clicks on the personalized link provided in the email and registers his or her issue quickly and easily online. If the customer has a compliment, comment, or suggestion to make, those may be entered, as well. If the customer is "ok" and has nothing to say, they ignore or delete the email. OPEN-LINE assumes they are satisfied at that point in time.

Once a customer enters a communication, OPEN-LINE establishes feedback loops between you and your customers so your customers' issues are never "lost" and never closed without the customer's ultimate approval. OPEN-LINE makes communications by and between you and your customers transparent and targeted.

OPEN-LINE lets you customize and brand the "check-ins" you send to your customers, providing an effective venue to promote a positive brand image as well as an "open-line" of communication with your customers. OPEN-LINE also provides robust online reporting functionality so you can track activity and improvement on demand, in real time and full color.

3. What's the difference between OPEN-LINE and online customer satisfaction surveys?

OPEN-LINE is NOT a survey. OPEN-LINE does not ask customers to rate their satisfaction levels according to a scale or to answer the questions you think are important. OPEN-LINE does not "measure and report," giving you a metric and no clue about how to raise your score (as if that really means anything). Rather, OPEN-LINE is a pro-active polling tool that "senses and responds" to customer requirements. OPEN-



LINE searches for specific, actual customer needs and provides the tools to manage them efficiently and effectively.

4. How does OPEN-LINE relate to and coexist with problem-resolution, marketing, or communication systems you may already use?

OPEN-LINE does not necessarily replace the service and support, marketing, and customer communication systems currently in place for your customers. OPEN-LINE acts as a safety net to ensure that these other systems are, in fact, working well. It catches customers who may be falling through the cracks in those systems, giving you the opportunity to bring these customers back “just in time” and demonstrating where the cracks are so you can continuously improve all of your support systems. Beyond that, OPEN-LINE reaches customers in a fresh, new, cost-effective way. With OPEN-LINE, you may be hearing from customers you’ve never been able to connect with before.

5. Is OPEN-LINE limited to certain types of business organizations?

Absolutely not! OPEN-LINE is very flexible in how it can be deployed and has been designed to work in just about any type of organization. OPEN-LINE is currently used by organizations as diverse as commercial printers, wineries, fitness clubs, non-profit organizations (Little Leagues and Ombudsman groups), and private schools.

6. What has OPEN-LINE’s track record been?

OPEN-LINE is based on a licensed and patented concept from Xerox Corporation (Sentinel Customer Satisfaction Assurance System™ Xerox Corporation, US Patent 7698162). IBRC has been running Xerox’s proprietary program since 2004, exclusively using IBRC software and services ... the same ones behind OPEN-LINE.

- 25 countries
- 12 languages
- Over 100,000 customer end users
- Over 40,000 email check-ins per month
- Over five years of experience
- 99.6% up-time rating 24/7/365
- Proven processes and proven functionality

7. What is IBRC?

IBRC, Inc. is the company that brings you OPEN-LINE. Incorporated in 1997 (and doing business successfully since the mid-1980s), IBRC (the International Business Research Center) is a privately-held business specializing in customer satisfaction and online communications systems. Headquartered in El Segundo, CA, IBRC’s goal with every project and service it offers is to help its clients make well-informed decisions and take timely and effective action in our global world of ever



increasing competition and complexity. OPEN-LINE is just one of the many services IBRC offers. To learn more, visit us at <http://www.ibrc.com>

8. Why might you want OPEN-LINE?

- To demonstrate a proactive commitment to improving your customers' or constituents' experiences with your organization
- To actually improve your customers' or constituents' experiences by finding and solving their problems and soliciting and using their comments and suggestions, building satisfaction and loyalty in the process
- To uncover problems your customers or constituents are having that you might otherwise never hear about (except, maybe, as a complaint on any number of social networking sites) and "rescue" your customers before they go away angry
- To locate the "cracks" in your support and communication systems and have the chance to "fill in the cracks" for improved customer/constituent experiences as well as improved system efficiencies
- To open an effective channel of communication with your customers or constituents
- To deepen and extend your brand presence and awareness

9. Why might you not want OPEN-LINE?

- You might say you already do online surveys:
OPEN-LINE perfectly complements surveys (and probably lets you reduce the number of surveys you conduct), but it is NOT a survey. In fact, it's sort of the "anti" survey. It asks just one, open-ended question. If the customer has nothing to say, they ignore or delete the check-in. If the customer chooses to post a response, it takes only a few minutes of the customer's time to complete. And, the customer's response doesn't get lost in the black hole of aggregated data – you're given the tools to track, respond to, and resolve each and every customer issue.
But, you say you need aggregated data? That's provided, too -- online, real-time, with full-color graphics and a simple-to-use interface.
- You might say you already use something like OPEN-LINE:
OPEN-LINE is unique. With a US Patent Pending, OPEN-LINE is a sophisticated, yet simple, tool dedicated to improving the customer experience.
- You might say you are going through a re-organization [or lay-off or budget reduction or system overhaul, etc. ... fill in the blank] and you don't want to start anything like this now:
OPEN-LINE can be especially valuable during times of upheaval, making sure that customer service and the customer experience don't degrade during the confusion. And, because OPEN-LINE is so easy to implement, there is little, if any, downside. Don't abandon your customers just when they need you the most!



- You might say it's too expensive:
No way! OPEN-LINE comes in three plans, geared to organizations of all sizes and requirements. Prices start as low as \$75 per month. Let us give you a quote: stewart.morse@ibrc.com .

10. How much does OPEN-LINE cost?

OPEN-LINE is offered in three plan options:

- OPEN-LINE Connect!™ for smaller businesses and organizations with limited budgets
- OPEN-LINE Essential™ for larger implementations that require built-in service and support
- OPEN-LINE Professional™ for enterprise-level engagements where more sophisticated administrative functionality is a requirement

Prices start as low as:

- \$75 per month for OPEN-LINE Connect!™
- \$250 per month for OPEN-LINE Essential™
- \$1,550 per month for OPEN-LINE Professional™

11. How do you find out more about OPEN-LINE?

Several presentations and online demos are available on the www.ibrc.com/Openline.html website. If you want more information, contact stewart.morse@ibrc.com for a free, no-obligation consultation.

12. How do you get on OPEN-LINE?

Contact stewart.morse@ibrc.com to get started.

Implementation

13. What does it take to implement OPEN-LINE?

OPEN-LINE was designed to be easy to implement and easy to use. The basic steps to implementation are:

- a) Decide which customers you want to put on OPEN-LINE, how you want to group them, and when you want to poll them.
- b) Send us your logo, choose your color scheme and data-entry fields, and approve the check-in text.
- c) Send us your customer email list (first name, last name, email address) in Excel format.



- d) Have your Console Users attend a 45-minute training session or review the training guides.
- e) Send out an Invitation/Introduction Letter (or email) to your customers just prior to the first check-ins going out so you get the most PR value from the launch and so your customers know what to expect.
- f) Launch!

Don't worry. We have lots of experience doing this and we'll be with you every step of the way.

14. How long can I expect the implementation process to take?

The length of the implementation process depends on how quickly you can provide items a) through e), above. Some organizations can do this quickly (in a week). For others (especially larger, more complex businesses that require buy-in and approvals from various internal groups), this process can take several months. Upon receipt of the required information, it takes no more than 5 business days for the OPEN-LINE Team to setup, QC, and launch a typical implementation.

15. What is a customer group?

A customer group is the smallest administrative and reporting unit in OPEN-LINE for which distinct information may be gathered. For instance, three separate customer groups may be set up corresponding to your Eastern Sales Region, Central Sales Region, and Western Sales Region. This would allow you to get separate OPEN-LINE reports for each of these regions as well as reports combining all three or any two of the three regions

16. Can OPEN-LINE be customized?

OPEN-LINE is highly customizable – color and icon themes, data-entry fields, drop-down categories, check-in and thank-you text, and check-in delivery schedules are all customizable at no extra cost. Customization beyond those items, including integrations with pre-existing systems, may be possible, but require a price quote. Please discuss any special account needs directly with the OPEN-LINE Team.

17. How do you get your customer emails into OPEN-LINE?

OPEN-LINE uses a simple Excel form to import your customer email addresses (along with customer first and last names as well as phone numbers and company names, if you'd like). We'll provide you with a form to use when the implementation process kicks off.

18. What's the difference between scheduled and event-driven check-in delivery?

With scheduled check-in delivery, OPEN-LINE automatically sends e-mail check-ins on a regular, usually monthly, basis to your customers. In this case, OPEN-LINE is searching for wide-ranging problems and feedback.



With event-driven check-in delivery, check-ins are sent to your customers based on some trigger event occurring. For instance, OPEN-LINE check-ins might be sent following delivery of an order or attendance at an event. In this case, OPEN-LINE is searching for feedback related to the particular event.

19. Can you put a link to OPEN-LINE on your website to collect customer feedback from there?

Absolutely! We can set up a link to OPEN-LINE that may be placed anywhere on your current website. The link recognizes customers already in OPEN-LINE and allows customers not yet in OPEN-LINE to add themselves. Both types of customers, then, can conveniently post feedback and open a line of communication with you right from the website they already frequent.

20. Can your customers enter feedback to OPEN-LINE from their mobile devices (Blackberries, iPhones, etc.)?

Yes, your customers can receive OPEN-LINE check-ins and access the OPEN-LINE website directly from their web-enabled hand-held devices, such as Blackberries and iPhones. OPEN-LINE's customer-facing web pages have been formatted to work well and look sharp on most such devices

21. Can your customers access their personalized OPEN-LINE links anytime or only when the check-ins are sent?

Using the links provided in their check-in emails (or a link provided on your website, see above) your customers can access their personal OPEN-LINE websites at any time (24/7/365, with occasional down-time for maintenance). Typical check-in text explains this to your customers. They may save the URL to their browser "favorites" or simply save the email with the link to reference on demand.

22. What if particular customers don't like OPEN-LINE? Can they opt out?

Yes, your customers are always given the option of opting out of OPEN-LINE. The process is straight-forward and simple (like everything about OPEN-LINE).

23. What kinds of reports will you have access to?

OPEN-LINE has a library of on-demand, real-time, online reports to use to administer tickets, monitor Console User performance, and gauge the experience levels of your customers. You can also choose to design your own reports using our Ad Hoc reporting tool, and save those reports to create your own personal library. Most reports have drill-down functionality, so you can see the details behind the aggregated numbers. Most, also, are presented in both table and chart layouts, and may be either printed or exported to a variety of formats.



About Console Users

24. What is a Console User?

The Console User is the person (or persons) you designate to manage the customer feedback that comes into OPEN-LINE. Ideally, this person is a part of your account management or customer support organization and is already in place to service customers.

25. What will the Console User need to do?

Console Users login and access OPEN-LINE to view and respond to customer feedback. They are alerted by automatic OPEN-LINE e-mails when customers submit or reopen tickets and when OPEN-LINE escalates a ticket because of inactivity. Console Users open and read each issue submitted. They solve problems, either handling the issues themselves or referring the problems to others within your organization who have the expertise needed to resolve issues. Console Users are responsible for monitoring and recording progress toward resolutions, whether they solve the problems themselves or forward them on to others.

26. How long does it take to get trained?

The average Console User can be fully trained to use the OPEN-LINE Console in one hour or less. The OPEN-LINE console is designed to be easy to use and intuitive. Self-help guides are available on the console, if needed.

27. How do you make sure your Console User is solving all the problems that come in, and in a timely manner?

OPEN-LINE will keep you informed in several ways. First, problems that are not opened within 24 hours of submission and problems that are not updated within 48 hours of submission are escalated. This means that OPEN-LINE will send both you and your Console User an automatic e-mail notice that the ticket has been escalated and will automatically change the ticket status to "escalated". Second, you will be able to run reports at will to search for unsolved and escalated problems and to determine average "time to solve" statistics.

28. What happens if a problem can't be solved?

From time to time, a customer's problem will not be solvable to the customer's satisfaction. For example, perhaps resolution of a problem requires a new service or product that is not and will never be offered. In these rare cases, the Console User should fully explain the situation to the customer and document (in OPEN-LINE) the various issues concerned. The final ticket status would then be set to "Not Solvable," thereby closing the ticket without claiming that it was fully "solved" and without triggering an automatic confirmation email to the customer.



29. Can you -- as well as your Console User -- be notified when OPEN-LINE submissions come in?

Yes, this can be arranged either by adding you as another Console User (which may incur additional Console-User subscription fees) or through your Console User's Outlook setting. The Console User would go to the Rules Wizard (under Tools on the Navigation bar) and follow directions to set up a new rule to have the OPEN-LINE e-mails copied to you.

30. Your Console User sometimes travels; can he/she access OPEN-LINE while on the road?

Yes, the OPEN-LINE console can be accessed from any computer web browser and OPEN-LINE e-mail notifications can be sent to and recovered from various mobile devices, such as Blackberries, in addition to standard computers.

31. What happens when your Console User goes on vacation?

Whoever normally backs up your Console User when he/she is out of the office would simply use the Console User's user id and password to access the OPEN-LINE Console. Your Console User would be responsible for training his/her substitute. Passwords may be reset upon the Console User's return, if desired, through the Preferences tab.

32. How many problems can your Console User expect? How many comments and suggestions?

The average "steady-state" OPEN-LINE account can expect less than 2% of e-mail check-ins as problems, and less than 10% as comments and suggestions. So, for an account with a thousand check-ins per month, that comes out to less than 20 problems and 100 comments/suggestions per month.

33. Can you have more than one Console User? How would that work?

Yes, you can assign more than one Console User. This can be accomplished in several ways. For instance, you can set up a number of different customer groups for your customers and assign distinct Console Users to each customer group. Or, you can establish a pool of Console Users, designating one as the Administrator with the authority and tools to distribute in-coming tickets to the pool members as desired/required. Alternatively, you can have tickets routed to different Console Users depending on information provided by the customer through data input fields. For instance, you might customize OPEN-LINE with a Location field and have tickets routed to different Console Users based on the location your customer selects. (Please note that routing on drop-down fields often incurs additional set-up fees.)



Technical Requirements

34. What are the technical requirements for OPEN-LINE?

They are simple and few:

- (1) Your customers must have access to the Internet and have the ability to receive emails with embedded links, whether on a computer or a mobile device. (Simple, right?)
- (2) You and your Console Users require access to the Internet via a computer web browser and the ability to receive emails on either a computer or mobile device. (Still simple, right?)

OPEN-LINE supports most modern Internet browsers, including IE 6.5, 7, and 8; Safari 3.0 to 3.2 and 4.0; Chrome 3.x; and, Firefox 3.0 to 3.5. Customer-facing web pages are also supported by the Blackberry and iPhone browsers.

35. What do you do if you have an older Internet browser?

OPEN-LINE is configured to work with most modern Internet browsers (see above), but it may not work perfectly with older browsers. It's usually easy to update your browser. For example, to get the latest IE browser, click on <http://windowsupdate.microsoft.com/?IE> and follow the directions provided by Microsoft.

36. How complicated is OPEN-LINE to run?

OPEN-LINE is easy. Console Users can be fully trained in less than one hour. The console, including the reporting tool, is straightforward and intuitive. Customers require no training and it typically takes less than four minutes of the customer's time per transaction to use OPEN-LINE.

37. Will you need to talk to your IT department in order to implement OPEN-LINE?

In general, you will NOT. OPEN-LINE is a totally web-based system operated on OPEN-LINE's own secure servers. There's no software to download; no programs to purchase. From time to time, IT departments will want to confirm this fact with you. Also, from time to time, you will need to get their assistance for proxy-server access issues.

38. What do you do if your or your customer's proxy server won't allow access to the OPEN-LINE web-site?

Contact the relevant IT department and ask them to allow access to OPEN-LINE. The OPEN-LINE Team will provide the port address. This is a rare requirement and a simple process, if needed.



Security and Confidentiality

39. Will your customer email addresses and communications be safe and secure?

Yes.

- OPEN-LINE will never use, sell, or forward your customer email addresses for personal gain. It will never disclose your customer email addresses, unless required by law, as stated in the OPEN-LINE Privacy Policy (see below).
- Personalized OPEN-LINE links are obfuscated for confidentiality and security.
- The OPEN-LINE website runs on a Secure Socket Layer ("https"), providing the same level of online privacy and security used by banks and other financial institutions on their websites.
- OPEN-LINE's data-base, application, and web servers are both physically protected (locked, key-card-only access, hardware firewalls) and logically protected (software firewalls, encrypted passwords, multiple password layers changed frequently with strict need-to-know-only access, strict permission-based access).

40. Who owns your data on OPEN-LINE?

You do. You always have the ability to download your data anytime through Reporting. And, if you choose to "turn off" OPEN-LINE, simply download your data and take it with you.

41. What kind of data base does OPEN-LINE run on?

OPEN-LINE runs on an Oracle 10g data base, for premium functionality and security.

42. What are OPEN-LINE's Privacy Policy and Terms & Conditions of Use?

Read them right here:

- [Privacy Policy](#)
- [Terms & Conditions of Use](#)