

Televerde Data Standards

Basic System Note Rules

All system notes contain an electronic footprint of the date, time, and TSR name. Therefore, always type notes with accuracy as it reflects your professional skills.

In system notes:

- **Do not** use acronyms or contractions
- **Do not** abbreviate words or turn words into symbols
Incorrect: # of emp is 500 Correct: Number of employees is 500
- **Do not** add unnecessary comments such as *left voicemail*
- Use **compound words** properly. A compound word contains two parts and is connected with a hyphen. Each word is dependent on the other to create the meaning. Ex: They need a solution for real-time reporting.
 - decision-maker, full-time, part-time, non-profit, short-term, mid-year, cost-effective, back-up, real-time, as-needed, end-user, one-half
- The general **appointment format** for notes is: *Thursday, June 7th at 8:00am PST*
 - There is no need to include the year
 - The am/pm indication should not contain periods or spaces
 - Always confirm time zone – PST, MST, CST, EST
- The phrase **looking at** is sometimes used incorrectly. There are more accurate and professional expressions that will work better.
 - Inaccurate:
 - They are looking at virtualization for server consolidation.
 - They are looking at purchasing in June.
 - They are looking at EMC and Network Appliance.
 - Accurate:
 - They are *considering* virtualization for server consolidation.
 - They are *planning* to purchase in June.
 - They are *evaluating* EMC and Network Appliance.
- When using **numbers**:
 - Consider how the reader might interpret the information
Incorrect: The client needs 2 2850 dual processor units.
Correct: The client needs two 2850 dual processor units.
 - Single numbers as words – one, two, three
 - Larger numbers as numerals – 100, 200, 300
 - Large precise numbers in combination – 1 million
 - Percentages as numerals – 10 percent
 - Time and years as numerals – 10:00am or 2007
- **Informal notes** are used before a record becomes a lead. The notes on the record are kept for reference purposes, such as an internal scratch-pad. It should only contain information that will be useful to the next person touching the record. Informal notes are brief, generally

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recap a conversation, and are used as direction (like an electronic trail) for the next person opening the record. Only place relevant and important information in notes.

- Samples of Informal Notes
 - 4/18/2007 11:21:11 AM by: TSR
Operator stated Nick Chapman will be out of town for 2 months on a special project. He should be back in the office in July.
 - 4/18/2007 8:39:25 AM by: TSR
Spoke with Susan Parker. She is the correct person for storage. She requested a call back in two weeks.
 - 4/17/2007 8:32:35 AM by: TSR
Spoke with John Smith. He does not handle back-up and storage. Referred me to Susan Parker.
 - 4/16/2007 10:22:45 AM by: TSR
Operator referred to John Smith and Nick Chapman.
- Formal notes are used at the point the record becomes a lead. Notes of the conversation with the prospect should read like a business memo. The formal format is important as these notes are posted to the Extranet for the client.

System Notes Template:

MM/DD/YYYY 00:00:00 AM/PM by: TSR Name

Spoke with, <Contact Name>, <Title>.

<Campaign specific – add Caller ID>

<Include prospect's information regarding . . .

- Product(s) being evaluated/considering to change
- Solutions/data sources used
- Pains, challenges, problems they are experiencing
- Expectations they are taking to solve their issue(s)
- Key features or functionality they require
- Role in decision-making process*
- Budget cycle/status*
- Purchase timeframe*
- Call to action (appointment date or timeframe)*
- Special instructions to client>

**Dependent on campaign, these may be an IDG answer

09/31/2008 10:11:12 AM by: TSR Name

Spoke with Sam Yosemite, Director of Technical Services. Their current environment consists of 3TB. They just implemented a small IBM SAN FC as part of a project. He stated that they will most likely add more disk space using IBM when they go live in the 1stQ of 09. They are not using virtualization; they have however, discussed this but have no set plans at this time. Sam is interested in learning more about what Insight Compellent has to offer with the focus on virtualization. Sam is expecting a call from an Insight Compellent Representative on Friday, October 10th at 9:00am PST. Please send confirmation email.

Capture Accurate Account Information

Capture the following account information on all deliverables

- Company Name, Physical Address, Mailing Address
- City, State, Zip Code, Country
- Prefix (Mr., Ms., Dr.), Contact Name, Suffix (Jr., Sr.)

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- Telephone Number, Direct Line or Extension
- Title, Department, e-mail address
- URL (Client/Campaign Specific)
- Industry Type and SIC Code (manufacturing, healthcare, banking, etc.)

Company/Contact Name

- Read back name and spelling using phonetics
- Company name must be organizations legal name or as stated on their business letterhead
- Ask if has last word abbreviation such as Incorporated (Inc), Company (Co), Limited (Ltd)
- When complete name does not fit in field, abbreviate appropriate words using US Postal Service Abbreviations

Address, City, State, Zip Code, Country

- Populate mailing address on the mailing address tab
- If physical and mailing addresses are the same, ensure they match
- Actual street names should never be abbreviated.
 - 125 West Ofc Rd (incorrect)
 - 125 West Office Rd (correct)
- Abbreviate directional of address (i.e. North, West, Southwest) and the type of road (i.e. Road, Street, Avenue, etc.) can be
- Use US Postal Service Abbreviations as applicable

URL (Web site Address)

This information is not required unless it is campaign specific. If the company does not have a URL populate this information in the notes.

e-mail address

E-mail is one of the most critical pieces of information to capture. Clients depend on the prospects email address to make contact with the prospect.

- Read back email address using phonetics with any letters that can be confused
- Ensure mailbox name matches prospects first and last name
- Ensure domain name matches company name and/or website address
- When e-mail does not match, verify e-mail address is correct and enter note on deliverable that email address is now correct

Parts of e-mail Address

An e-mail address is like a phone number – every part must be correct for the call to be completed. If one character of an e-mail address is incorrect, we will not be able to communicate with that person using e-mail. Future efforts to collect that information are lost.

There are roughly three parts to every e-mail address:

1. Mailbox Name **Fname.Lname@televerde.com**
2. @ Symbol **Fname.Lname@televerde.com**
3. Domain Name **Fname.Lname@televerde.com**

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1. **Mailbox Name:** The mailbox name is the personal and unique name or identifier. This will generally match the prospects name (i.e. first initial and last name, last name and first initial, first name, dot (.), last name, etc.). After you capture the mailbox name, make sure it matches with prospects name. The mailbox name can be any combination of upper/lower case letters, numbers, and symbols. They may run in a constant stream of letters or numbers, in any order, or separated by an underscore (_) or a period (.).
Examples: *Bugsbunny12, BugsB, BBunny, Bugs_Bunny, bugs.bunny*
2. **@ Symbol:** Pronounced *at sign* or simply as *at*, this symbol is used in e-mail addressing to separate the user's name from the user's domain name, both of which are necessary in order to transmit e-mails. For example, the e-mail address *Jane.Smith@televerde.com* indicates that the user named *Jane.Smith* receives e-mail *at* or *@* the *televerde.com* domain.
3. **Domain Name:** Within the Internet, domains are defined by the IP address. All devices sharing a common part of the IP address are said to be in the same domain. The domain name has three parts separated by a "dot" or period (.). The first part is usually the company name, hosting Internet service provider, or e-mail service provider followed with (.) and finishes with the organization type (see below). Once you capture the domain name look at the company name to ensure it matches. If they do not match ask why.

.com	- commercial organizations
.gov	- government organizations
.org	- not-for profit/non-profit organizations
.net	- technology organization s
.edu	- educational organizations
.mil	- military organizations
.biz	- businesses
.name	- individuals
.pro	- professionals
.museum	- museums
.coop	- for business cooperatives
.aero	- for the aviation industry

The letters *B, C, D, E, F, G, H, M, N, P, S, T, V, Z*, can be mistaken for other letters. Recite phonetically and record the correct letters and case. To recite the e-mail address above you would say, "*Upper case J lowercase a n e at televerde dot com.*"

Additional Data Standards

The following information should be entered in the CRM script.

- **PROJECT BUDGET:** All project budget amounts must be in numeric form with no punctuation.

Correct: 150000 Incorrect: 150K or 150,000 or \$150000

- **TIMEFRAME:** All date questions must follow mm/yy format.

Correct: 10/02 Incorrect: Oct. 1, 2002, 10/01/02, Within 6 months, Next quarter, or 24 months

United States Postal Service Abbreviations

A

Alley	Aly
Annex	Anx
Arcade	Arc
Avenue	Ave

B

Bayou	Byu
Beach	Bch
Bend	Bnd
Bluff	Blf
Bluffs	Blfs
Bottom	Btm
Boulevard	Bldv
Branch	Br
Bridge	Brg
Brook	Brk
Brooks	Brks
Burg	Bg
Burges	Bgs
Bypass	Byp

C

Camp	Cp
Canyon	Cyn
Cape	Cpe
Causeway	Cswy
Center	Ctr
Centers	Ctrs
Circle	Cir
Circles	Cirs
Cliff	Clf
Cliffs	Clfs
Club	Clb
Common	Cmn
Corner	Cor
Corners	Cors
Course	Crse
Court	Ct
Courts	Cts
Cove	Cv
Coves	Cvs
Creek	Crk
Crescent	Cres
Crest	Crst
Crossing	Xing
Crossroad	Xrd
Curve	Curv

D

Dale	DI
Dam	Dm
Divide	Dv
Drive	Dr
Drives	Drs

E

Estate	Est
Estates	Ests
Expressway	Expy
Extension	Ext
Extensions	Exts

F

Fall	Fall
Falls	Fls
Ferry	Fry
Field	Fld
Fields	Flds
Flat	Flt
Flats	Flts
Ford	Frd
Fords	Frds
Forest	Frst
Forge	Frg
Forges	Frgs
Fork	Frk
Forks	Frks
Fort	Ft
Freeway	Fwy

G

Garden	Gdn
Gardens	Gdns
Gateway	Gtwy
Glen	Gln
Green	Grn
Greens	Grns
Grove	Grv
Groves	Grvs

H

Harbor	Hbr
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Harbors	Hbrs
Haven	Hvn
Heights	Hts
Highway	Hwy
Hill	HI
Hills	Hls
Hollow	Holw

I

Inlet	Inlt
Island	Is
Islands	Iss
Isle	Isle

J

Junction	Jct
Junctions	Jcts

K

Key	Ky
Keys	Kys
Knoll	KnI
Knolls	Knls

L

Lake	Lk
Lakes	Lks
Land	Land
Landing	Lnds
Lane	Ln
Light	Lgt
Lights	Lgts
Loaf	Lf
Lock	Lck
Locks	Lcks
Lodge	Ldg
Loop	Loop

M

Mall	Mall
Manor	Mnr
Manors	Mnrs
Meadow	Mdw
Meadows	Mdws
Mill	MI
Mills	Mls

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Mission	Msn
Motorway	Mtwy
Mount	Mt
Mountain	Mtn
Mountains	Mtns

N - O

Neck	Nck
Orchard	Orch
Oval	Oval
Overpass	Opas

P

Park	Park
Parks	Park
Parkway	Pkwy
Parkways	Pkwy
Pass	Pass
Passage	Psge
Path	Path
Pike	Pike
Pine	Pne
Pines	Pnes
Place	Pl
Plain	Pln
Plains	Plns
Plaza	Plz
Point	Pt
Points	Pts
Port	Prt
Ports	Prts
Prairie	Pr

R

Radial	Radl
Ramp	Ramp
Ranch	Rnch
Rapid	Rpd
Rapids	Rpds
Rest	Rst
Ridge	Rdg
Ridges	Rdgs
River	Riv
Road	Rd
Roads	Rds
Route	Rte
Row	Row
Rue	Rue
Run	Run

S

Shoal	Shl
Shoals	Shls
Shore	Shr
Shores	Shrs
Skyway	Skwy
Spring	Spg
Springs	Sprgs
Spur	Spur
Spurs	Spur
Square	Sq
Squares	Sqs
Station	Sta
Stravenue	Stra
Stream	Strm
Street	St
Streets	Sts
Summit	Smt

T

Terrace	Ter
Throughway	Trwy
Trace	Trce
Track	Trak
Trafficway	Trfy
Trail	Trl
Tunnel	Tunl
Turnpike	Tpke

U

Underpass	Upas
Union	Un
Unions	Uns

V

Valley	Vly
Valleys	Vlys
Viaduct	Via
View	Vw
Views	Vws
Village	Vlg
Villages	Vlgs
Ville	VI
Vista	Vis

W

Walk	Walk
Wall	Wall
Way	Way
Ways	Ways
Well	WI

Wells	Wls
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Secondary Unit Designator

*Does not require number to follow

Apartment	Apt
Basement*	Bsmt
Building	Bldg
Department	Dept
Floor	Fl
Front*	Frnt
Hanger	Hngr
Lobby*	Lbby
Lot	Lot
Lower*	Lowr
Office*	Ofc
Penthouse*	Ph
Pier	Pier
Rear*	Rear
Room	Rm
Side*	Side
Slip	Slip
Space	Spc
Stop	Stop
Suite	Ste
Trailer	Trlr
Unit	Unit
Upper*	Uppr

Last Word Abbreviations

Administration	Admn
Agency	Agcy
Branch	Br
Center	Ctr
Company	Co
Corporation	Corp
Division	Div
Enterprise	Enterprs
Government	Govt
Group	Grp
Headquarters	Hdqtrs
Incorporated	Inc
Laboratory	Lab
Limited	Ltd
Management	Mgmt
Manufacturer	Mfr
Manufacturing	Mfg
Municipal	Mncpl
National	Natl
Partnership	Prtnrshp

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Directional

North	N
South	S
East	E
West	W
Northeast	NE
Southeast	SE
Northwest	NW
Southwest	SW

Standard Business Abbreviations

Academy	Acdmy
Account	Acct
Accountant	Acct
Accounting	Acctg
Administrative	Adm
Administrator	Admin
Advertising	Advtg
Aerospace	Arspc
Analysis	Anlys
Analyst	Anlyst
Application	App
Appraiser	Apprser
Approved	Appd
Appointment	Appmt
Approximate	Approx
Architect	Archit
Architecture	Archit
Assembly	Assy
Assistant	Asst
Associate	Assoc
Associated	Assocd
Attention	Attn
Auditor	Aud
Automotive	Auto

B

Bank	Bk
Banker	Bkr
Banking	Bkg
Benefit	Bnft
Billing	Blg
Block	Blk
Bookkeeper	Bkpr
Bookkeeping	Bkpg
Borough	Boro
Boutique	Btq
Broadcast	Brdcst
Broadway	Brdwy

Broker	Brkr
Brokerage	Brkrge
Budget	Bdgt
Bureau	Bu
Business	Bus
Buyer	Byr

C

Campus	Cmps
Canal	Cnl
Capital	Cptl
Casualty	Csly
Catalog	Ctlg
Catering	Ctrg
Cellular	Cell
Central	Ctrl
Certification	Certfn
Certified	Cert
Chairman	Chmn
Chancellor	Chanc
Charter	Chrtr
Chemical	Chem
Classification	Class
Clerk	Clk
College	Col
Commerce	Comm
Commercial	Cml
Commissioner	Comr
Committee	Comte
Communication	Commtn
Compensation	Cmpnstn
Comptroller	Comptlr
Computer	Cmptr
Computerized	Cmptrzd
Computing	Cmptg
Consolidated	Consol
Construction	Constr
Consultant	Conslnt
Consulting	Consltg
Consumer	Cnsmr
Contractor	Cntr
Controller	Contr
Coordinator	Coordntr
Credit	Crdt
Customer	Cstmr

D

Database	Db
Defense	Def
Department	Dept
Design	Dsgn
Designer	Dsgnr
Developer	Devpr

Development	Dev
Director	Dir
Distributing	Distrng
Distribution	Distrb
Distributor	Distr
Documentation	Dcmntn
Domestic	Dom
Drafting	Drftg

E

Ecology	Ecol
Economic	Econ
Economist	Econst
Editor	Edit
Education	Educ
Electric	Electr
Electrical	Elecl
Electronic	Elect
Elementary	Elem
Emergency	Emer
Employment	Emplmnt
Engineer	Engr
Engineering	Engrg
Entertainment	Entrtn
Environment	Environ
Equipment	Equip
Equity	Eqty
Evaluation	Eval
Examiner	Exmnr
Executive	Exec

F

Fabrication	Fbrcn
Facility	Faclty
Factory	Fctry
Federal	Fed
Fidelity	Fidly
Finance	Fin
Financial	Fincl
Financing	Fing
Forecasting	Frctsg
Foreman	Frmn
Forestry	Frsty

G - H

Global	Glbl
Group	Grp
Hardware	Hdwr
Holding	Hldg
Horticulture	Hort
Hospitality	Hospty
Hours	Hrs

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I

Implementation	Implntn
Independent	Indpdnt
Industrial	Industl
Industry	Indus
Information	Info
Institute	Inst
Integrated	Intgrtd
Intelligence	Int
International	Intnl
Interstate	Intrst
Inventory	Invty
Investment	Invstmnt

J

Journal	Jour
Junior	Jr

L

Language	Lang
Lawyer	Lwyr
Leader	Ldr
Legal	Lgl
Liability	Lblty
Limited	Ltd
Local	Lcl

M

Machinery	Mchry
Machinist	Machst
Maintenance	Maint
Manager	Mgr
Manufacturer	Mfgr
Marketing	Mktg
Mechanical	Mech
Medical	Med
Membership	mbrshp
Merchandising	Mdsg
Micro	Mcr
Microcomputer	Mcrmptr
Midway	Mdwy
Midwest	Mdwst
Mortgage	Mrtg

N - O

Nationwide	Ntnwd
Network	Ntwrk
Networking	Ntwrkg
Office	Ofc
Officer	Ofcr

Operation	Opn
Odering	Ordg
Organization	Org
Organizational	Orgl

P

Packaging	Pkkg
Partner	Ptrnr
Payable	Pybl
Payment	Pymt
Pharmaceutical	Pharml
Phone	Ph
Physicist	Physt
Planner	Plnr
Planning	Plng
Plant	Plnt
Plastic	Plas
Policy	Plcy
President	Pres
Principal	Prin
Processing	Prcsg
Procurement	Prcmnt
Product	Prdt
Production	Prdn
Program	Prgm
Programmer	Prgmr
Programming	Prgmg
Project	Proj
Property	Prop
Publishing	Pblshg
Purchasing	Prchg

Q - R

Quantity	Qty
Radiology	Rdgy
Realtor	Rltr
Receivable	Rcvbl
Receiving	Rcvg
Recruiter	Rcrtr
Regional	Regl
Representative	Rep
Requirement	Rqrmnt
Research	Rsrch
Resource	Resrc
Retail	Rtl
Rural	Rur

S

Sales	Sls
Salesman	Slsmn
Satellite	Sat
Satisfaction	Stsfctn
Savings	Svgs

Scientific	Scntfc
Secretary	Secy
Section	Sect
Security	Secty
Senior	Sr
Service	Svc
Shipping	Shpg
Shoppe	Shp
Software	Sftwr
Solution	Sltn
Specialist	Spclst
Standard	Std
Strategic	Strtgc
Subsidiary	Suby
Superintendent	Supt
Supervisor	Supvsr
Supply	Supl
System	Syst

T

Technical	Techl
Technician	Techn
Technology	Techlgy
Telecommunication	Telecom
Telemarketing	Telmktg
Telephone	Tel
Textile	Txtl
Training	Trng
Transportation	Trnsprt
Treasurer	Tres
Treasury	Trsry

U

Underwriter	Underwtr
United	Untd
University	Univ

V

Vending	Vndg
Visual	Vis
Vocational	Vocnl
Volume	Vol
Volunteer	Volntr

W

Warehouse	Wrhse
Warehousing	Whsg
Wholesale	Whsl
Wholesaler	Whslr
Worldwide	Wrldw

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