



CUSTOMER FEEDBACK CAN TAKE YOUR BUSINESS TO THE NEXT LEVEL

WHITEPAPER

In any business, loyal customers must first be satisfied customers. That in itself is a competitive advantage. Part of providing excellent customer service is listening to and acting upon what your customers are telling you. This involves managing their feedback and quite critically, their complaints.

This is usually easier said than done, however. You assume you are “in touch” with your customer – understanding what they want and need – but they may surprise you by telling you that somewhere things went off track – and often it is too late. It is important to have a complete understanding of exactly where your customers stand in order to incorporate their needs into your organization’s strategy and build upon it, ensuring you keep your loyal customers satisfied and coming back for more.

Part of building a better customer relationship strategy is investing in a case and complaint management solution. Different from Customer Relationship Management (CRM), case and complaint management uses customer feedback to expose possible issues in your business and provides insights you can use to drive product, service and process improvements, which in turn drives future loyalty. Aptean has created a step-by-step guide to help you choose a solution best suited for your organization. Hitting these touch points will guide you in the right direction to confidently make the best choice.

6 STEPS TO SELECTING A CASE AND COMPLAINT MANAGEMENT SOLUTION

1. Know your industry regulations

It is important to know which regulatory bodies govern your particular business type. Among other things, regulatory bodies like the Consumer Financial Protection Bureau (CFPB) (US) and Financial Conduct Authority (FCA) (UK) look to ensure that you are monitoring and proactively addressing customer complaints in an efficient, compliant and fair manner. Failing to meet compliance standards has resulted in substantial fines for many firms.

According to the U.S. Dodd-Frank Wall Street Reform and Consumer Protection Act, the CFPB for example can seek to impose civil penalties of up to:

- \$5,000 per day for the violation of a CFPB rule
- \$25,000 per day for the reckless violation of a federal consumer protection law
- \$1,000,000 per day for knowing violation of a federal consumer financial law

It is also imperative that not only you know your regulations, but that your case and complaints management vendor provides needed partnership and expertise. Your vendor should be knowledgeable of the regulatory bodies that govern each industry and which regulation guidelines you are expected to meet.

2. Identify your customer feedback channels and ensure that your solution can support them

With more customers leaving complaints digitally via Twitter, Facebook, online chat, mobile platforms, etc., it's important that you monitor that feedback and give it the same amount of attention as you would a phone call or a face-to-face engagement. A 2011 study done by Maritz Research said that 70% of customer complaints on Twitter were being ignored by companies. [source]. Making this worse is how easily customers can retweet and share these complaints across social media, damaging your brand reputation.

Channels can and will change. Having a solution that is continually updated to include the latest trends and patterns in customer behavior is important.

Having a strategy that is inclusive of all channels will help characterize your brand image to customers and potential customers alike. A good vendor will work with you to establish clear, concise workflows and paths for all of the individual channels you wish to open. It is a careful balance that has to be made between opening the flood-gates and maintaining that consistently high customer experience across all channels.

3. Determine the value of a case and complaint management solution

When beginning your search, develop a framework that outlines the goals you want to achieve. Match those to the values derived from the solutions you evaluate. Examples include:

- Increased customer loyalty and retention rates
- Improved communication between your employees and your customers
- Automated management of customer complaints allows you to spend less effort doing repetitive work
- Clear understanding of mistake identification and the steps required to fix them
- Long term problem resolution to improve products and services
- Compliance with industry regulations

Putting a value to these areas will help make your vendor selection more accurate and help your evaluation process. Using tools such as ComplaintCalculator.com will help put a number around the value of good customer service and customer satisfaction.

4. Involve the right decision makers

You may think only your customer service team needs to be involved in choosing the right case and complaint management solution. However, it's important to involve others within the organization such as sales, marketing, compliance and risk services. Just like software should be communicating across all platforms, the right employees should have clear visibility to customer interactions, the current state of the customer, and customer feedback to make impactful decisions.

Every area of your organization will have differing requirements and consulting with them early will help ensure a good all-round solution is found to address every concern. A strong project sponsor empowered to make executive decisions around direction is equally important – this person should be tasked with matching the organization’s mission statement to the project deliverables.

5. **Involve the right partners**

As with any software, working with a trusted vendor to learn from, buy, and implement your case and complaint management solution will maximize your investment. Your vendor’s expertise will give you the confidence to use a solution for enhancing the overall customer experience.

A good vendor will do more than supply the solution, they will consult closely with your teams to ensure organization specific quirks are considered and addressed by the solution. No two organizations work in exactly the same way. It is imperative that the vendor understands this and is accommodating to the needs of the company.

6. **Create a checklist for a solution**

A checklist should define the overall goals for your case and complaint management solution. For example:

- ✓ To keep your customers and win new ones
- ✓ To comply with any industry regulations and avoid punishment
- ✓ To provide outstanding levels of customer service
- ✓ To enhance efficiency of people and teams to improve morale
- ✓ To establish root-cause analysis and learn from complaints
- ✓ To establish a process for turning feedback into action
- ✓ To provide good data to inform and guide key business decision makers

CASE AND COMPLAINT MANAGEMENT: THE CHOICE IS YOURS

Good case and complaint management is an integral part of quality customer service. It provides tangible benefits for your business, your staff and in particular, your customers’ experience. Handling complaints well demonstrates accountability to your customers – there is no hiding from a complaint and anything other than a world-class solution to help your employees improve the lives of your customers will fall short of doing that.

An effective case and complaints management solution streamlines the people, processes and information in your business – in turn giving you the tools you need to turn customer feedback from something that you simply have to ‘manage’ into something that improves the culture, profitability and success of your organization.

Interested in learning more about Aptean? Please contact us at 1.855.411.2793 or email us at info@aptean.com.



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