

CIVICA



10 reasons why customer support systems fail to meet complaints requirements

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Introduction

An effective complaints and feedback software solution can be a great tool for assisting customer relations experts to identify and resolve customer complaints as well as handle other feedback such as compliments and suggestions. These solutions can deliver a powerful range of tools to complaint handlers and managers - assisting in the resolution of customer dissatisfaction and preventing recurrence of emerging issues.

Complaints managers and customer relations managers often face internal pressures to join wider Customer Relationship Management (CRM) software implementation programs and will be asked to justify why a dedicated complaints and feedback software solution will provide a better solution than a CRM or a customer service and support application.

Research by [Michael Hill](#) of Civica Case Management has identified ten reasons why CRM systems or service and support tools often fail to deliver against an organization's complaints and feedback management requirements.

Those ten reasons are:

1. Escalation stages

Many complaint handling processes incorporate multi-stage escalation procedures - the customer being able to complain to frontline staff, escalate to management (or a centralized function) and, potentially, even escalate to an external body (such as an Ombudsman, consumer body, adjudication service or regulator) or the courts.

Civica Case Management is designed to support these processes and enable a case to be tracked at every stage (using a unique case reference number across all stages) so that the reasons for escalation can be clearly understood and unnecessary duplication of complaints is prevented.

CRM systems and customer service and support tools really struggle to deliver this requirement - and often require separate tickets to be created for each stage of the process, resulting in different reference numbers being allocated and adding to the complexity of using the system and analyzing the data.

2. Multi-dimensional classifications

Most CRM systems allow tickets to be created; that might be simple product information requests, service requests or support requests. They can be classified simply and easily using a single dropdown list of options. But a complaint will often be a multi-aspect issue - the customer expressing dissatisfaction with, for example, the time spent getting through to speak to someone in a contact center, the quality of the product delivered or the product return process.

Civica Case Management associates each case with other attributes, such as a product range and type/service department and business unit, customer demographics, third party involvement (such as a [www.civica.com Page 3](#) supplier or service provider), staff member involvement (whether the subject of a complaint or a compliment) or third-party representatives that may be acting on behalf of the customer.

Civica Case Management enables all attributes to be captured, addressed and analyzed; however, a CRM customer service or a support application is unlikely to deliver against this important requirement.

3. User licensing

Many complaint and feedback processes are collaborative - different departments are often asked to provide specialist assistance, advice or comments before, for example, a solution can be offered to

the customer. Therefore, back-office teams (such as accounts, legal, product development, compliance) might need to be tasked to complete an action, review a response and/or receive information/data from the system.

Unfortunately, the cost of providing access via a CRM or a customer support and service tool can be prohibitive and manual, paper or email-based solutions will often be implemented instead. However, Civica Case Management now offers 'free' licensing for these occasional users.

4. Correspondence management

CRM solutions usually support phone and email interactions with customers. Some are also starting to extend their support to social media channels. But escalated complaints and feedback also often require a letter to be sent (sometimes simply attached as a PDF in an email to the customer) because it is required by the regulations or consumer laws.

Civica Case Management delivers integration with common office-productivity applications, such as Microsoft Word or Google Docs, enabling templates to be implemented and used by case handlers - greatly assisting the productivity. Sophisticated template design tools allow letters and emails to be pre-populated with key case data (such as case summary, customer contact details, case handler contact details, escalation details, expected resolution date and so on), helping case handlers to personalize responses and increasing the potential for successful resolution of complaints

However, CRM and customer support and service tools are not designed to deliver against such requirements and often require additional investment for bespoke integration and specialized resource during the implementation phase.

5. Corrective actions

Civica Case Management highlights failures or areas that require improvement - and those that require the selection and initiation of one or more corrective actions. These actions might include giving guidance or training to a group of staff, reviewing an operational procedure or providing financial redress to a customer - and each may need to be completed by different departments within the organization.

A CRM system or a customer support and service application may allow ad hoc actions to be selected by a user and added to a ticket (case); however, Civica Case Management is able to easily guide a user through the process of selecting and assigning each corrective action and tracks completion of the action and its outcome. This allows the benefits to be evaluated.

6. Business structure

CRM and customer support and service applications may utilize a menu of products and/or services across the system. This allows a ticket to be created and assigned for any further action as required.

A complaints and feedback process tends to operate differently from standard customer contact process. The process for a customer phoning to make a payment differs from the process of a customer phoning to advise that payment has already been made and that they are unhappy because the service has now been terminated, creating a serious inconvenience.

Civica Case Management enables appropriate organizational and business structures, and associated business rules, to be implemented - without adversely affecting other areas of the organization. These structures also enable structured analysis and reporting to be conducted that is focused on the complaints and feedback requirements of the organization.

7. Management information (MI) and reporting

Many CRM systems and customer support and service tools provide support for dashboards to be displayed, showing key performance indicators, call volumes, sales volumes and so on, with more intensive analysis and reporting conducted through use of a business intelligence platform.

However, a primary requirement for the complaints manager is being able to gather and analyze the information about the cause of customer dissatisfaction and use of data to address emerging issues and identify the need for product or service improvements. Civica Case Management not only supports a wide range of reports that assess performance in handling customer feedback, but also highlights trends of emerging or known issues, resolution outcomes, offers of financial redress, corrective actions initiated and much more.

Compliance staff may also have specific MI requirements and may want also to use reporting tools to assess the quality of complaint handling.

The in-built MI and reporting features of Civica Case Management supports drill-down from a report to the underlying case data - allowing the reporting user to validate the data but also initiate appropriate actions arising from the reporting exercise. Unfortunately, this a key area that CRM or customer support and service applications are unlikely to address.

8. Ease of use

CRM systems and customer support and service tools are often designed to handle high volumes of customer contact data and/or the processing of pre- and post-sales activities. They can, of course, deliver an excellent solution for these activities - but the interface may not be the best solution for the handling of complaints and feedback, especially given that some users may only have an occasional involvement in the process.

Civica Case Management is focused on managing cases within specified timeframes, highlighting trending issues, allocating cases, examining escalation rates and other specific activities. It is designed to highlight or ease access to this information for users - something that's likely to be difficult to achieve within a CRM solution, a customer support and service application.

9. Competing product development requirements

CRM and customer support solutions often include some additional fields such as a customer support ticket case type, set SLAs and some simple task management. However, the complaints and feedback processes operated by many organizations are often more sophisticated, and implementing these processes within CRM or service and support tools may require significant bespoke development.

Quite simply, the CRM or support tool integrators focus and expertise is likely to be geared to delivering the core functionality of the application. Of course, at Civica Case Management we focus on delivering functionality that supports the handling of complaints and feedback, and 'future proofs' the solution.

10. Cost

If the complaints and feedback requirements of an organization go no further than requiring a few fields for data capture, key task generation and completion and ticket closure with some headline KPI monitoring, then implementing customer support through a specialized application or CRM may be an attractive and affordable solution.

However, if the organization's needs are more sophisticated, bespoke development of CRM or the customer support and service tool is likely to require the investment of more time and money on the project, or a decision taken to reduce the functionality and the toolset that is available to case handlers.

Summary

Civica Case Management is an affordable solution that delivers 'best of breed' features and functionality whilst also supporting appropriate interfaces between the CRM system, the support tool and the complaints and feedback solution.

Complaint handlers often need access to a customer's contact history and key account or product information when attempting to resolve case or whilst conducting an investigation.

A CRM system or a customer support and service application may well be able to deliver an integrated solution. However, Civica Case Management is a purpose built and affordable integrated solution.

Civica Case Management integrates with other key operational systems to really enhance the user experience and provide the tools that caseworkers need to resolve complaints effectively and efficiently. The system may need to interface with address-lookup solutions, other contact management software (such as email, SMS and telephony), financial systems (for processing refunds and goodwill payments), product knowledge bases, geo-maps (such as Google maps so that clusters of complaints and feedback can be visualized) and so on.

Some next actions

Be clear about what you want a complaints and feedback system to do for you - and consider how this will enhance the management of complaints and feedback across your organization.

Develop your own list of requirements, prioritize the list between functionality that is 'essential' and those it would be 'nice to have'. Benchmark each potential supplier against that list

Identify how widely available you want access to the system to be - both now and in the future? Do you only need access to centralized functionality, or do you require a hybrid approach where a centralized complaint handling function integrates, enabling collaboration with other business areas to resolve customer issues?,

Identify the systems that hold data that may assist in the resolution and/or analysis of complaints and clarify potential interface points. Obtain costs for integration with other systems and evaluate the cost against the savings in productivity that may be gained.

Consider all options but make sure you understand the hidden costs of bespoke development or modular add-ons to existing systems. Are you likely to need to invest in developing the solution in future and is this more than the cost of simply choosing Civica Case Management, a solution that can be integrated with your core system(s) straight away?

Author

[Michael Hill](#) is the Complaint Management Expert at Civica. Previously Michael ran his own complaint management consultancy, and is the author of two books, "Complaints management. Turning negatives into positives" and "Effective complaint management". Also chair of the British Standards committee that designed a new complaint handling standard for the UK (BS 8543). He also represents the UK at International Standards Organization (ISO) events that debate complaint handling standards.

About Civica Case Management

The Civica Case Management team enjoy the benefits of being part of the wider Civica group, giving us the freedom to help organisations of all types to better manage complaints and feedback, with the support and resources of a global company. Our business is the coming together of two key areas of expertise - software design and cloud architecture coupled with a deep understanding of complaint management, as both a process and the practice of consumer redress.

Our experience of system design and project management of enterprise level complaint, feedback and case management solutions in highly secure and regulated environments such as finance, local government, health and social care, central government departments and regulatory bodies stretches back over 25 years.

Our professional experience of complaint management goes back equally as long. Whether turning around customer service operations of public bodies by helping repair relationships with citizens, improve perceptions and re-build reputations; or providing the complaint management expertise to help finance operations in the UK, Europe, North America and APAC meet the demands of local and international regulatory frameworks.

Few understand how to apply technology to meet the complaint management objectives of today's regulated environments as well as us. Critical to this is uncovering the trends within complaint data and applying it for the purpose of Quality Management and Continual Improvement. Quite simply, we're better at Complaint Management because we love turning negatives into positives.

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