Managing Customer Complaints Effectively with Case Management Software

An eBook for Customer Support Teams

Case IQ

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WHY
Poor customer experiences could cost organizations around the world $3.7 trillion each year. (Qualtrics)

ROI
Case management software offers exceptional return on investment.

Case IQ

What is Case Management Software and How Will It Help to Manage Workplace Incidents?

Case management software makes it easy to track and manage customer complaints and analyze results for continuous improvement.

With all case information stored in a centralized database, case management software provides complete documentation of a complaint, creating a clear, searchable record. Using smart web forms, email-to-case or integration with existing hotlines, you will never miss a complaint. Complaint management software helps you respond quickly to every customer complaint and prioritize cases for follow-up.

Web-based case management software enables organizations to access case files from anywhere with an internet connection. If your complaint management software platform provides a mechanism to set up access roles, you can set restrictions so that each user can access only the case information they need. This keeps confidential information secure, private and compliant with information privacy regulations.

BACKGROUND

Managing customer complaints can be complex and time-consuming. A complaint management solution helps organizations respond quickly to keep customers satisfied and coming back.

ON THE FOLLOWING PAGE:
How Case Management Software Works:
- Multi-channel intake
- Case management
- Reporting
- Alerts/workflows
- Access/roles

How Case Management Software Works:

Customers

Intake

Create new cases quickly and easily, collecting all complaints and case-related information from any intake stream into one central file.

TELEPHONE HOTLINE
TEXT
INTERNAL WEB FORM
EXTERNAL WEB FORM
EMAIL-TO-CASE
2-WAY WEB PORTAL
24/7/365 AVAILABILITY
MULTI-LANGUAGE SERVICE
ANONYMOUS REPORTING OPTIONS

Customer Support, PR

Case Management

Manage investigations with workflow rules that create a logical, structured process and all case information stored in one place.

EMAILS
TO-DO'S
TASK ASSIGNMENTS
ADVANCED SEARCH
CASE LINKING
AI CASE SUMMARIES
CENTRALIZED DOCUMENTATION
WEB-BASED SYSTEM
MOBILE-FRIENDLY VERSION
CONFIGURABLE WORKFLOWS
SCALABLE PLATFORM

Managers, Executives

Reporting

Analyze investigation data using summary reports that provide in-depth information on trends and areas of risk.

DRAG-AND-DROP REPORTS
PERSONALIZED DASHBOARDS
BI TOOLS
REPORT DISTRIBUTION
REAL-TIME UPDATES
PERFORMANCE TRACKING
75+ GRAPH & CHART TYPES
AUTOMATED INSIGHTS

Why Do I Need Case Management Software?

A centralized case management platform that contains all case information in an organized, accessible format for key stakeholders helps customer support teams spot patterns and recurring complaints.
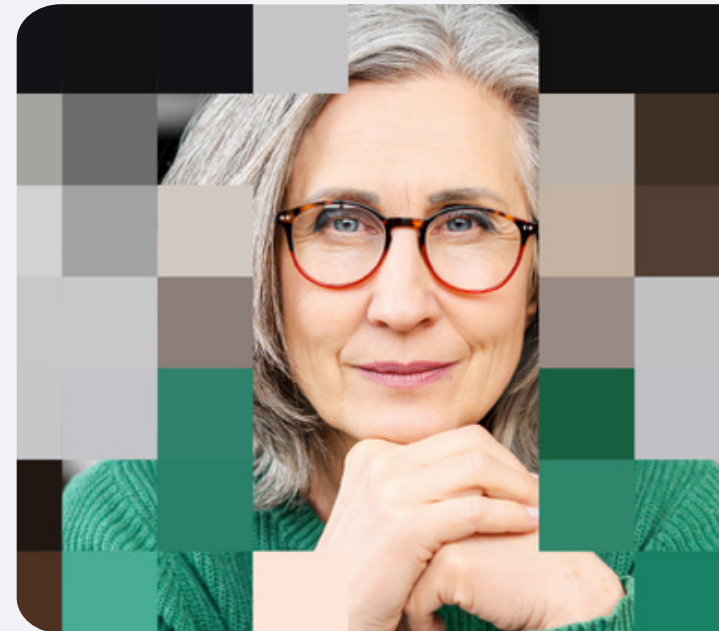
If your office is using spreadsheets or an outdated in-house system to manage complaints, you are at risk. Valuable information may be falling through the cracks and you may be missing opportunities to improve your customer experience.

Complaints that aren't tracked, investigated, and remedied can result in harm to members of the public, and in expensive legal and settlement costs.

Case management software uses task reminders to keep teams on track, reducing response times. For complaints that involve regulatory misconduct, case management software ensures that you record all the information you need for timely reporting.

STREAMLINED COMPLAINT MANAGEMENT SOLUTION

- Integration with existing systems
- Case prioritization
- Instant case assignment
- Task reminders
- Reporting capabilities
- Configurable forms and fields

Case Management Software Helps Organizations:

- Respond quickly to customer complaints
- Prioritize cases for follow up
- Instantly assign cases
- Manage tasks and due dates
- Generate insightful reports (graphs, charts, heat maps, tables)
- Identify opportunities for improvement

By Implementing Case Management Software, You Will:

- Capture every complaint
- Monitor case progress in real time
- Use alerts and notifications to enforce a consistent investigative process and provide early notice for cases that are off-track or high-risk
- Respond to complaints faster
- Create investigation reports in seconds using AI
- Conduct faster and easier root cause analysis
- Identify gaps, analyze trends, and reduce risk
- Work more efficiently
- Demonstrate responsive customer service

NEXT

Why Case Management Software Is Better Than the Alternative

Why Case Management Software Is Better Than Home-Grown and Spreadsheet Systems:

Spreadsheets:
- Can't collaborate
- Multiple files that are out of sync
- Hard to create the final investigation report
- Users manually track activity, date, and time, leaving the records open to mistakes and information gaps
- Users must cut and paste information into spreadsheets from other files resulting in high error rate
- No task assignment, alerts and deadlines
- No analytics

Home Grown:
- IT staff needed to maintain and fix
- In-house programmers required to update and fix problems
- Not purpose-built - may require work-arounds that deviate from best practices
- May not have task assignment, alerts and deadlines built-in
- May not have data analytics
- Information security and privacy may not be as strong as leading case management software
- May not be configured for roles and responsibilities associated with best practices

Case Management Software:
- No need for dedicated IT staff
- No hardware to buy
- No in-house expertise required for support and maintenance
- Best practices built into the system workflow
- Case activity is tracked with the date and time for accountability
- All information is in one centralized case file
- Strong information security and privacy built in
- Investigators, administrators and managers can set alerts and deadlines to keep cases on track
- Integration with employee databases allows information to be pulled into each field, instead of having to type or paste it in

5 GOOD REASONS TO IMPLEMENT CASE MANAGEMENT SOFTWARE:

1. Our caseload is increasing
2. Our teams are expanding
3. Our regulatory environment is changing
4. We want to work more efficiently
5. Competition is increasing in our market

The Best Time to Implement Case Management Software

There are several things to consider when deciding the timing for implementing case management software, but often it's changing circumstances that drive the need for a new system.

BE PROACTIVE
The best time to implement case management software is NOW. It's a lot easier to integrate a new incident management solution into your operations when processes are running smoothly, rather than waiting until you are scrambling to tackle a backlog of complaints.

Our Caseload is Increasing: Often, the need arises because of the addition of more customers. Implementing a new case management solution as early as possible will prevent complaints from falling through the cracks and will allow organizations to learn the system before their caseloads reach maximum capacity.

Competition is Increasing: To keep up with competition in their markets, organizations need to provide exceptional customer service. Case management software lets your respond to complaints faster, helping to build a reputation for superior customer service.

Our Regulatory Environment is Changing: Increased enforcement of federal and state reporting requirements puts heavy pressure on organizations to ensure their complaint resolutions are timely, thorough, and well documented.

We Need to Work More Efficiently: Complaint management can be complex and time-consuming. A case management solution with easy case creation, configurable workflows, and a multi-channel intake mechanisms ensures no complaints fall through the cracks, saving time and money.

Return on Investment

Case management software offers exceptional return on investment for customer relations teams.

- Cost avoidance – less money spent on IT and in-house programmers for upkeep.

- Cost savings – scalable platform makes it less expensive to upsize or downsize.

- Increased productivity – teams can get more done in less time.

- User adoption – people like using tools that make their jobs easier.

- Lower fines - proof of a timely, fair and complete response reduces your risk of non-compliance with regulatory requirements.

- Lower litigation costs - solid documentation of complaint responses lowers the cost of litigation and increases the chances that a lawsuit will be dropped.

- Reduced reporting time - use complaint data to report on trends and get results quickly

- Improved customer service - happy customers are more likely to give you repeat business.

Cost Comparison

The costs for building and maintaining a bespoke system are much higher than for implementing case management software.

Cost of Home-Grown

Software for managing workplace investigations can be complicated and in-house IT teams generally underestimate the costs to build and maintain a system.

- Building a system from the ground up requires conceptualizing and designing from scratch, which is time-consuming and labor-intensive.
- Cost and maintenance of servers in-house is often more expensive than hosting.
- Information privacy compliance mechanisms must be researched and incorporated.
- You'll have to purchase and maintain secure information backup systems and hardware.
- IT staff must be dedicated for the entire building phase, taking them away from other tasks.
- Continuity and maintenance can be an issue when the staff who built the system leave.
- Software upgrades and support require getting into the internal IT services queue and fighting to keep your priority.
- Penetration testing and security measures must be carried out at regular intervals, requiring IT staff time.

Cost of Case Management Software

Case management software can be a cost-effective solution for your organization. Total cost of implementing case management software includes:

- Time that would be spent researching companies, vetting proposals, and attending demonstrations.
- Built-in information privacy compliance, without the need to research and incorporate it.
- A one-time setup fee, which is lower than staffing costs to build a home-grown system from scratch.
- A few hours of IT staff input to ensure compliance with your company's security and process requirements.
- A couple of weeks of staff time for implementation, spread over the course of two months.
- On-site or remote training to ensure your team is comfortable using your new system
- Annual licensing fees, which include 24/7 support, so that your IT department doesn't need to be involved.

One-on-One Advice

Our team of experts has implemented Case IQ complaint management software around the world.

They are available - free of charge - to speak with you and share the best practices we've learned. No pushy salespeople, just a chance for you to learn from our experts.

With a single focus on investigative case management solutions and a 20-year track record of successful implementations, Case IQ is the global leader in configurable case management software for investigations. To get a demo please visit www.caseiq.com/request-a-demo

To book your one-on-one, please contact:

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