08. Complaint Management

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Click on this link for the full training material (PowerPoint)

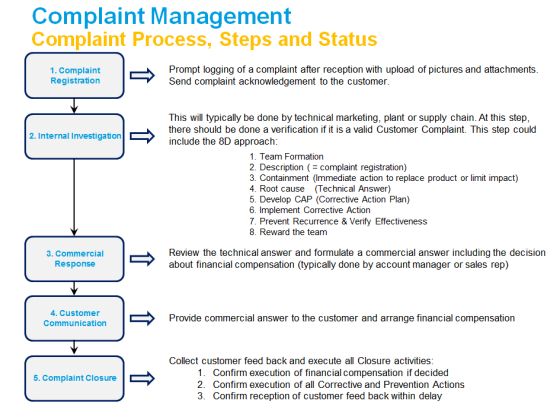
Managing Customer Needs

Added Value

By logging in the complaints in Salesforce.com, you will benefit from:

- An automated and harmonized process allowing to register, manage and follow up complaints in a single system
- Increased efficiency through sharing of information internally, and by providing a common platform for the involved teams
- Standard templates for investigation based on best practices in the complaints management process (e.g. 8D approach)
- An automated interface with SAP to quickly retrieve SAP data based on the document reference
- An ability to communicate to the customer with standard templates (e.g. acknowledgement email, confirmation of financial compensation, customer feedback, etc.)

What you need to know to start...



Status can be changed automatically or manually:

- **New** – Default status after creation of a Complaint
- **Acknowledgement Sent** – can be changed manually or by sending the Acknowledge Email
- **Under Investigation, Under Review, Communication Ongoing, Closed** – always manually changed
- **Waiting for Final Investigation, Completed** – always automatically changed by sending the Communication Email

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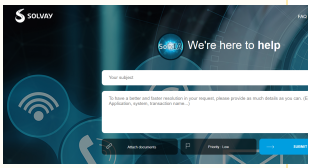
- Complaint: Create a complaint
- Complaint: Sending the Acknowledgement Email
- Complaint: Internal Investigation
- Complaint: Commercial Response
- Complaint: Customer Communication
- Complaint: Close a complaint
- Complaint: Related Lists
- Complaint: Reporting on Complaints

Need Help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example

Complaint Management
Complaint Process, Steps and Status

The 8 different Status are defined as following:

- **New –** as soon as the Complaint is created and registered in the System.
- **Acknowledgement Sent –** when the acknowledgement email has been sent to the main Contact of the Complaint.
- **Under Investigation –** when all the Complaint information is gather and Investigation can begin.
- **Under Review –** when the Investigation has been completed and the Review and the Commercial Response Proposal can be built.
- **Communication Ongoing –** when the Final Communication to the Customer is ready to be sent
- **Waiting for Final Investigation –** when a Communication is sent to the Customer but the agent is still waiting for more feedback
- **Completed –** when the Final Communication has been sent to the Customer
- **Closed –** when all the closure activities and tasks and the Complaint is closed

In Order to easily understand the Complaint Phases and Status, the Complaint Page Layout is organized in different sections:

- Case Information — Release R4.0
- Complaint Timeline Stream
- Complaint Description
- Customer Contact Information
- Order Information
- Containment/Immediate Action
- Investigation
- Root Cause
- Corrective Action Development and Implementation
- Recurrence Prevention & Effectiveness Verification
- Proposal Customer Response
- Closure — Release R4.0

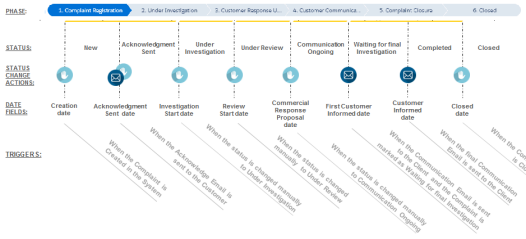
Complaint Management
Complaint Timeline

The **Complaint Timeline Stream** section in the Complaint Layout displays all the dates Stamps for each Phase/Status from the Complaint Management Process.

These fields can be filled in i) **manually** (M) by the User or ii) **automatically** (A) by the System

Complaint Management
Complaint Timeline

The fields that are automatically fill in by the System are always based on the **change of the Complaint Status**



Complaint Management
Complaint Assignment

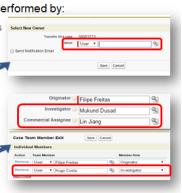
Assigning a Complaint to a User or a Group of User is to pass the responsibility to act on the Complaint on a particular phase of the process. On Salesforce, the Complaint Assignment is based on the field **Case Owner**.

Case Owner Filipe Freitas [Change]

A Case Owner can be i) a **User** (Solvay employee with a Salesforce license) or ii) a **Queue** (a group of Users that should be part of a team to handle Complaints with the same criteria).

Based on each GBU own process, the Complaint Assignment can be performed by:

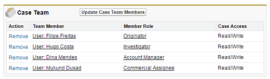
- **Manually changing the Owner –** at any time, a User with Access to a Complaint can click the button **Change** next to the current owner and select a new User/Queue to be the new Owner
- **Manually choosing the actors –** on the creation (from the fields Originator, Investigator* and Commercial Assignee*) or at any time (from the Case Team section) Users are able to select the future actors. The Owner will be changed manually based the change of the Status
- **Automatically selecting the actors –** the GBU has provided the rules, based on Complaint criteria, to automatically change the Ownership by the System of a Complaint to a specific User or a Queue



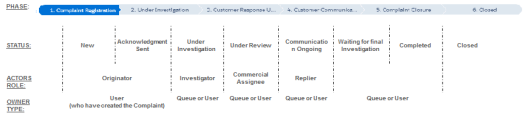
* The fields **Investigator** and **Commercial Assignee** are only available at the creation. If the Originator fill in those fields, those Users are added to the Case Team with the correct Role

Complaint Management
Complaint Assignment

The Complaint Actors are managed on the Case Team section on the Complaint Layout page. The Users are added to the Case Team i) **manually** by a User or ii) **automatically** by the System when they are the new Owners of a Complaint.



When the Users are added automatically to the Case Team, they are added with the correct Role based on the current Complaint Management Phase

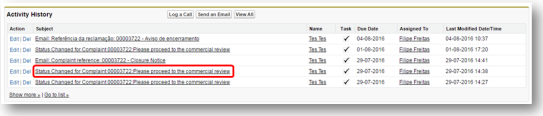


Example: For a Complaint for the GBU Novecare and the Complaint Region EMEA, a rule have been implemented to assign the Complaint to the User John Doe when the Status is changed to Under Review. When the Status is changed, Joh Doe is automatically the new Owner and also added to the Case Team with the Role Investigator

Complaint Management
Complaint Notification

Automatically Complaint Notification is a functionality triggered by the change of the Complaint Status.

Each status change have a group of Solvay Contacts (Salesforce or not Salesforce Users) that are receiving a notification email and this email is displayed in the **Activity History** section.



Complaint Management
Complaint Notification

There are four types of Addressers on the Complaint Notification Email when the Status is changed:

- **The new Owner –** if your GBU has implemented assignment rules and the owner is changed automatically to a specific User or to a Queue, the new Owners will received the Notification Email.
- **The previous Owner (if not a Queue) –** normally the previous owner is the User that changed the Status and triggered the notification. He/she will be also notified to ensure that the correct Owner has been assigned
- **The Case Team –** all Case Team Members, independent of their Role will receive the Notification Email
- **Solvay Contacts on Notification Rules –** group of users that are selected to be notified when the Status is changed.