

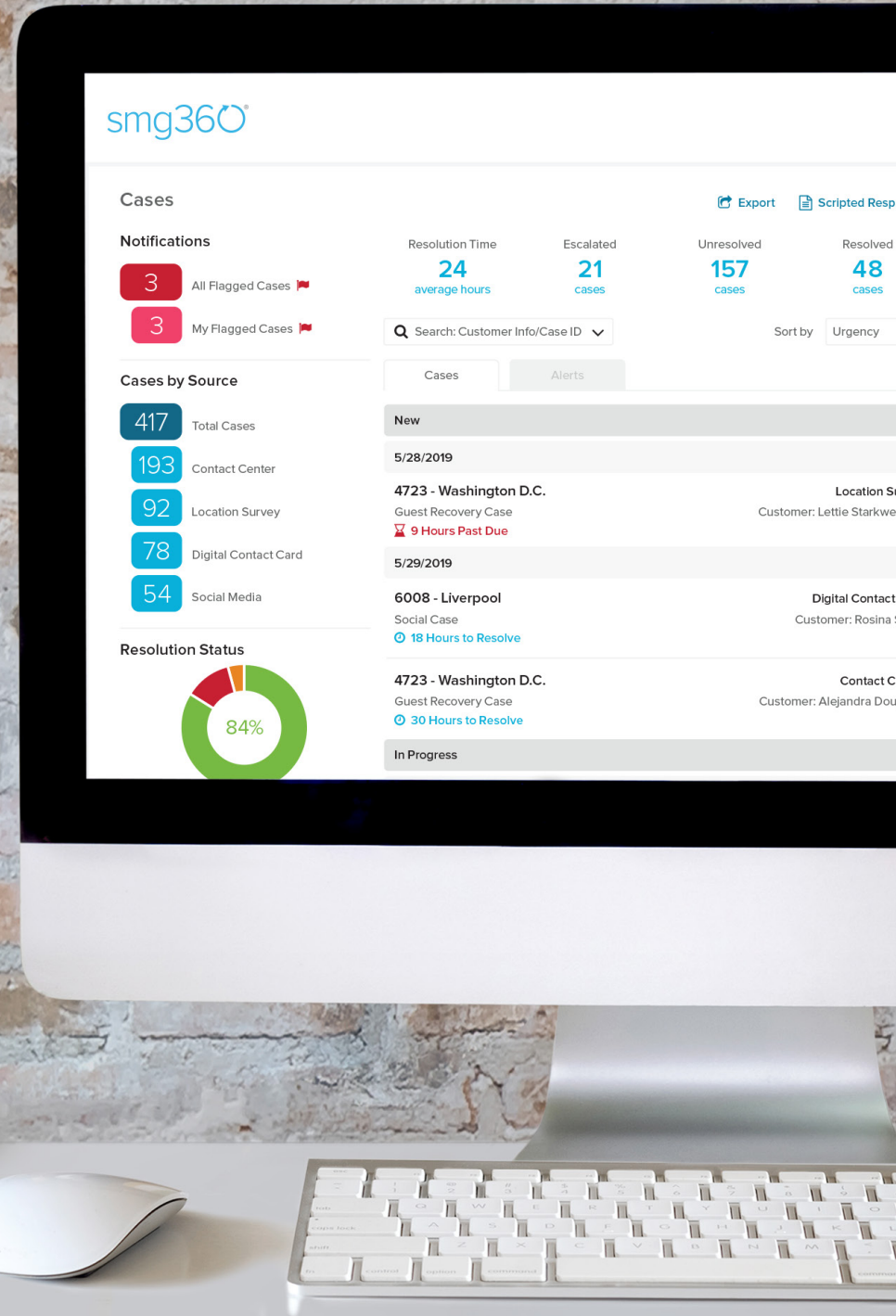
BEST PRACTICE GUIDE  
[case management]

# Close the loop

5 ways to resolve customer  
issues + drive loyalty



service  
management  
group®



smg360

Cases

Export Scripted Resp

Notifications

Resolution Time  
24  
average hours

Escalated  
21  
cases

Unresolved  
157  
cases

Resolved  
48  
cases

3 All Flagged Cases  
3 My Flagged Cases

Search: Customer Info/Case ID

Sort by Urgency

Cases by Source

417 Total Cases  
193 Contact Center  
92 Location Survey  
78 Digital Contact Card  
54 Social Media

Cases Alerts

New

5/28/2019

4723 - Washington D.C.  
Guest Recovery Case  
9 Hours Past Due

Location S  
Customer: Lettie Starkwe

5/29/2019

6008 - Liverpool  
Social Case  
18 Hours to Resolve

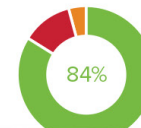
Digital Contact  
Customer: Rosina

4723 - Washington D.C.  
Guest Recovery Case  
30 Hours to Resolve

Contact C  
Customer: Alejandra Dou

In Progress

Resolution Status



# Don't ask if you don't intend to act

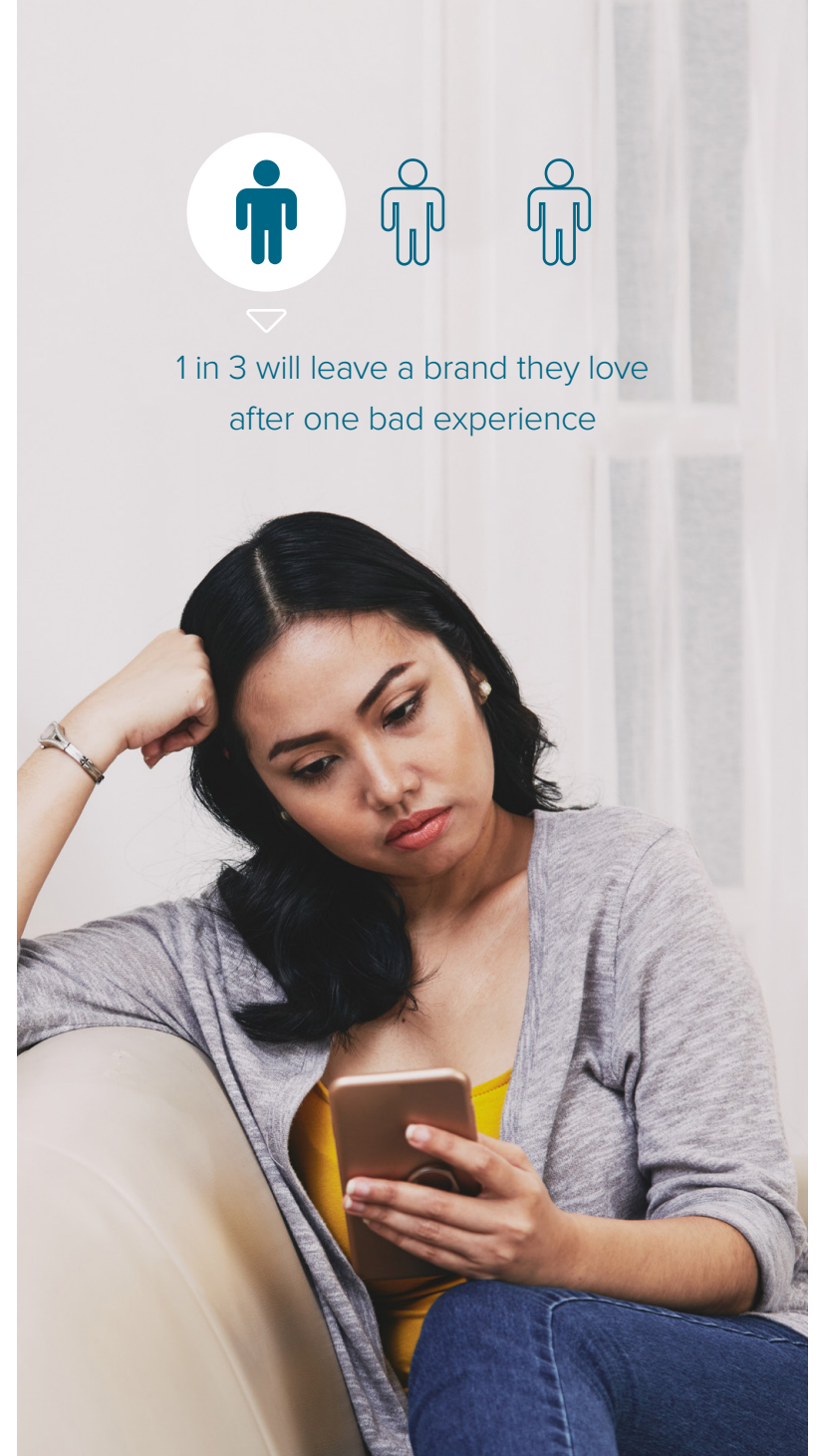
In order for your customer experience management (CEM) program to have any real impact, you have to be open to change. Brands with staying power are the ones that turn a customer's constructive criticism (or sometimes, just criticism) into an opportunity to learn and do better next time. And the most successful brands have a system in place to help them identify those problems faster, respond immediately, and provide a timely and painless resolution for their customers.

Why is this swift and seamless close-the-loop process so important? Because problem resolution can have a profound impact on a customer's likelihood to return and recommend — with **82% of customers reporting that having their issues responded to quickly is the number one factor of a great customer experience**,\* and 1 in 3 saying they'll leave a brand they love after one bad experience.\*\*

To survive the competitive landscape and reduce customer churn, brands need a process that allows them to resolve customer problems efficiently and effectively.

\* *Metrics for the Omnichannel Contact* | ICMI | 2016

\*\* *Experience is everything: Here's how to get it right* | PwC | 2018



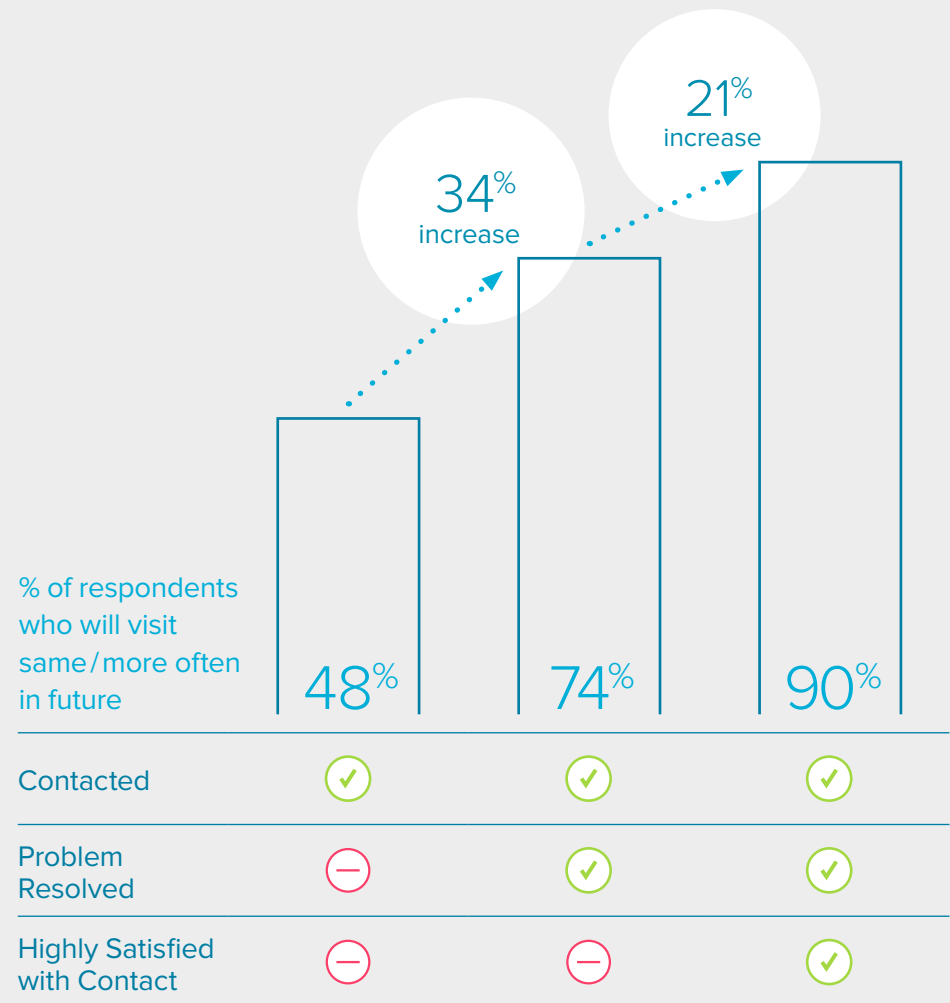
# You can't afford to ignore customer issues

Resolving customer issues has a big impact on your business, so when a customer provides feedback on a negative experience, you have to respond fast. Customer loyalty improves with each milestone—from being contacted, to having the problem resolved, to being highly satisfied with the resolution they received—so you have the opportunity to increase loyalty by providing a timely and thorough response to their problem.

## Bottom line

When it comes to customer issues, you have to act—now.

## Impacting loyalty through follow-up





# What's inside

An effective and efficient closed-loop process requires a committed effort by your organization. The good news is it's now easier than ever to empower your teams with tools to resolve customer issues and drive brand loyalty.

In this guide, we'll share how best-in-class case management technology helps you:

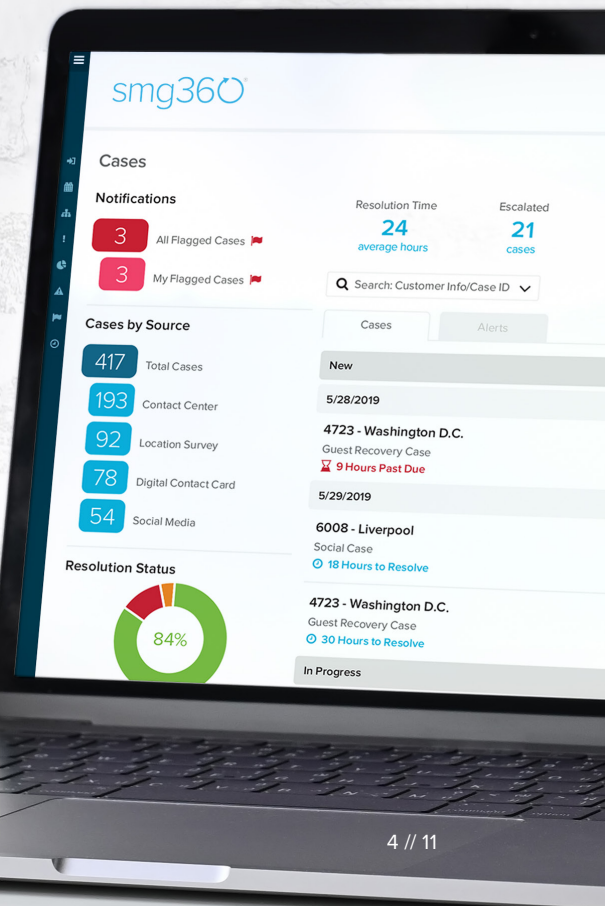
1 Listen to customers across all channels

2 Customize your program to fit the needs of your organization

3 Respond immediately to customers in-platform

4 Keep track of progress with goal-oriented resolution

5 Create front-line impact with customer recovery communication



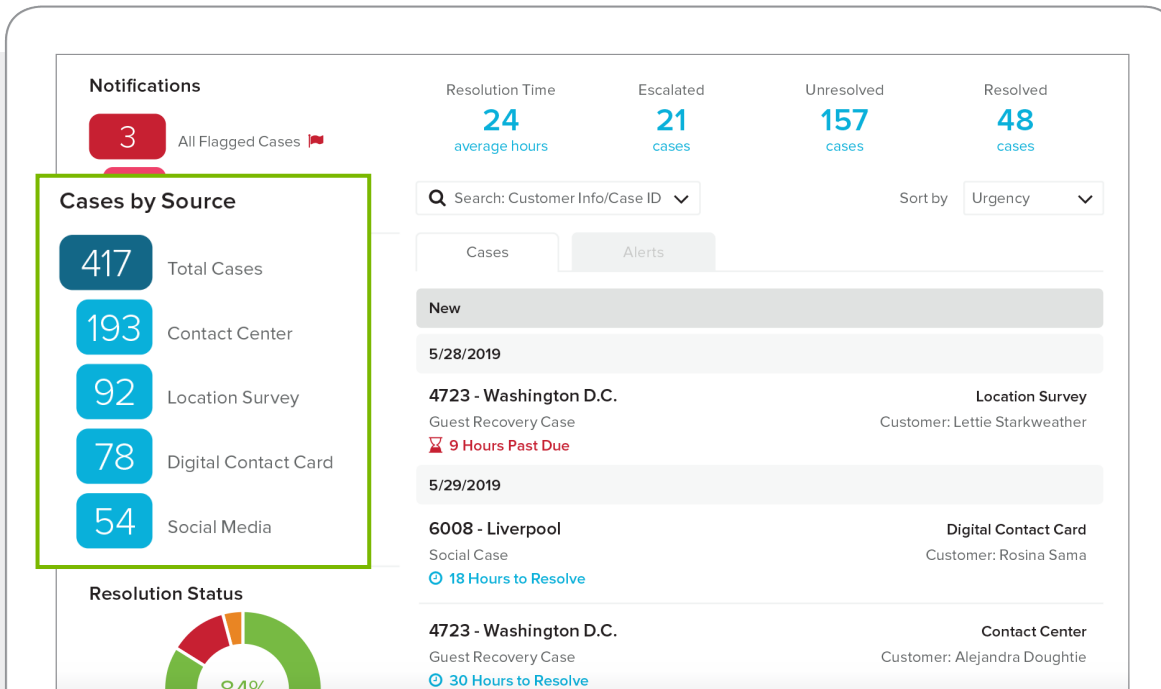
1

# Listen to customers across all channels



## Alerts

Sometimes a customer's comment doesn't require follow-up but is a good piece of information to share with your team. When a customer highlights exceptional service that you should celebrate or provides a non-urgent suggestion that doesn't merit contact, send these comments out as an FYI so your team can stay in the loop even if they don't need to take immediate action.



Customer issues aren't restricted to any one channel—and your ability to respond efficiently and effectively is critical no matter the source. Whether it's a comment on your website, complaints captured through your contact center,

or issues with online ordering—you need an all-inclusive, multi-sourced hub of customer feedback, so you can streamline issues and identify common themes across the business.

## Bottom line

Don't try to juggle customer complaints from multiple channels—streamline all the information you need into one centralized dashboard.

# 2 Customize your closed-loop program to fit the needs of your organization

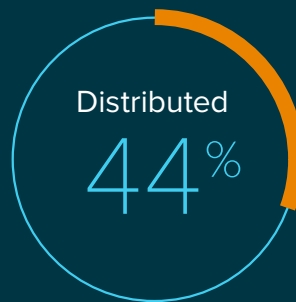
Here's how 128 brands have their systems set up:



Corporate owns all follow-up with customers regardless of channel

#### BENEFITS

- ▶ Unified brand voice
- ▶ Customer-centric
- ▶ Timely
- ▶ Validated



Field teams own all follow-up with customers who visited their locations + experienced a problem

#### BENEFITS

- ▶ Localized
- ▶ Personal touch
- ▶ Lower cost
- ▶ Empowers field teams



Ownership of customer follow-up dictated by request channel + feedback type

#### BENEFITS

- ▶ Blended approach

There is no one-size-fits-all when it comes to implementing a closed-loop system. The process looks different for companies of varying sizes and structure. That's why you need case management technology that offers flexibility and provides options.

Do you want a more controlled, centralized response system or a more flexible, distributed method? Or maybe a combination of both?

Don't get boxed into a cookie-cutter plan. Find what's right for you and makes the most sense for your business.

### Bottom line

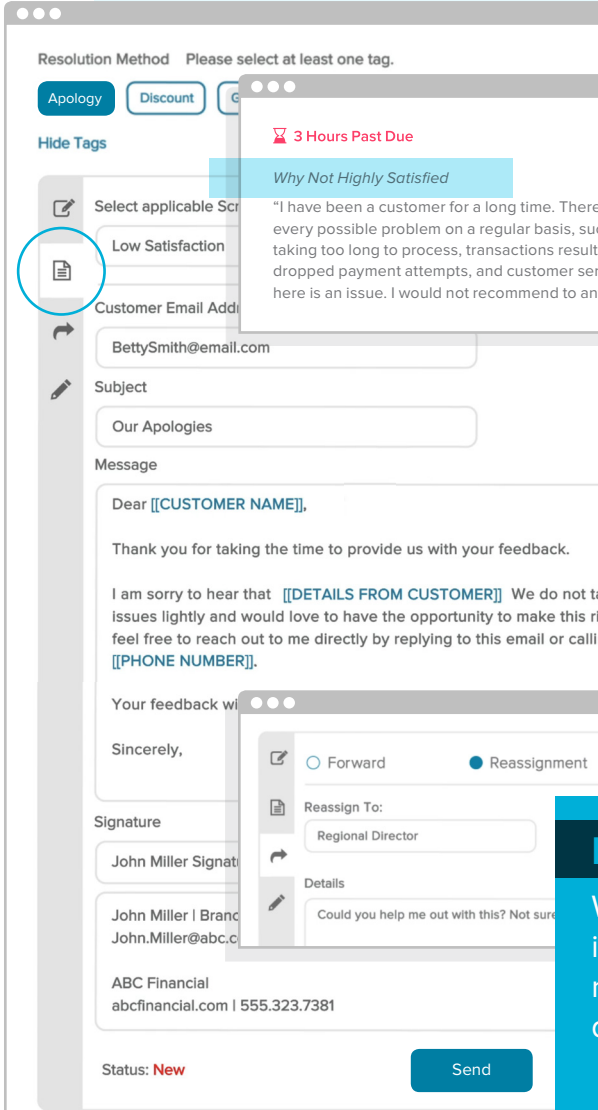
An effective close-the-loop process should be customized to your organization's needs and put you in control of how you're going to resolve customer issues.

# 3

## Respond immediately to customers in-platform

Case management provides you with in-platform capabilities, which is key to a seamless resolution process. Responding from one platform makes communication with your customer easier, so you aren't wasting precious time. Instead of opening new browsers, navigating multiple sites, logging in, and referencing company guideline standards before responding, you're just one click from contacting your customer and that much closer to resolving their issue.

Having a systematic customer recovery process in place—with built-in accountability—is critical to brand image and customer loyalty. In-platform perks like response templates and case tracking help drive consistent, on-brand messaging and create a unified front in customer recovery.



## Get a holistic view of the customer journey with case history

Not only do you need the details on the current issue, but with case history capabilities, you'll have access to that customer's past case interactions for a holistic view of their experience with your brand. By getting the full picture before you jump in, you'll be armed with helpful information such as what issues that customer has had before and what actions were previously taken.

It's best to go into a situation with all the information—use case history to see a customer's previous interactions with your brand and move forward with a more strategic plan.

**Bottom line**  
When customers need to be contacted, it should happen immediately. An in-platform response system makes that communication quick, consistent, and transparent.



# 4 Keep track of progress with goal-oriented resolution

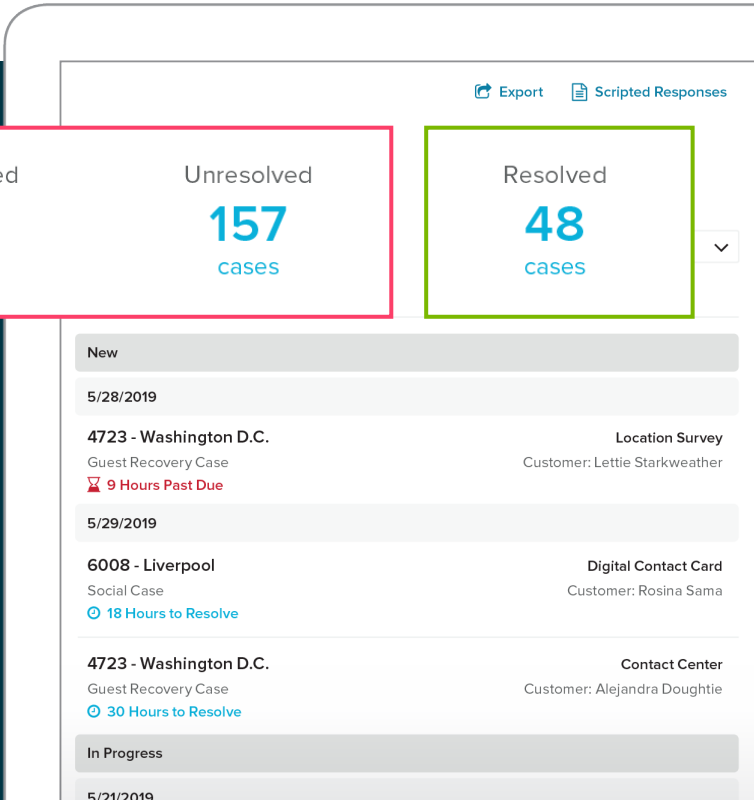
See where you're winning + where to grow

Resolution Time  
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We mentioned you're up against the clock when it comes to resolving customer issues. In fact, **it's best practice to resolve a problem within 24–48 hours of being contacted.** In order to stay on-goal, all conversations needs to be tracked through a case management platform, so you can keep an eye on progress and see it through to final resolution. Time-to-resolve metrics help you and your team stay on track to be sure each case is being resolved promptly.

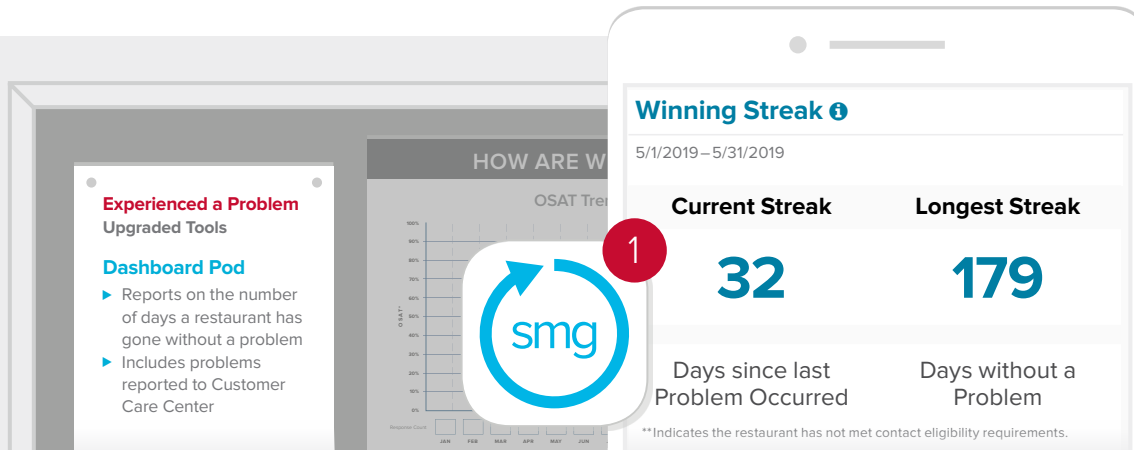
And if it's necessary to reassign the case, it should be simple to switch. Re-route the resolution where it needs to go quickly (i.e., reassign to a location manager if a problem has escalated or re-route the alert if it went to the wrong location). That way the case is always in the right hands.

**Bottom line**  
If a customer took the time to provide you with feedback, they're expecting you to do the same. Time-to-resolve metrics provide the accountability your team needs for a quick resolution.



# 5

## Create front-line impact with customer recovery communication



Obviously the main benefit of successfully resolving a customer issue is pleasing the customer. But a secondary perk is that case management also provides transparency into your service recovery efforts. This gives you a clearer picture of where you are succeeding and where your efforts should be directed. Does your team need to work on quicker

response times? Or is there a gap in communication where actions are falling through the cracks?

Use case management reporting to pull stats to share with your team and drive engagement across your organization. Take this opportunity to learn from successes and shortcomings, and drum up excitement to improve.

### Bring transparency to your close-the-loop process

Don't keep your field team in the dark—the best way to keep them motivated is to shed light on the tangible, day-to-day impact of an efficient close-the-loop process. Create splash pages, infographics, or monthly newsletters to keep everyone up-to-speed on customer recovery efforts.

#### Bottom line

Case management doesn't just help you resolve customer issues—it provides systematic insights on how to improve your close-the-loop process.

# Your CEM program: with case management vs. without

## With case management

- ✓ Access to an all-inclusive, multi-sourced hub of customer feedback
- ✓ In-platform response that provides quick, consistent, and transparent communication
- ✓ Customizable programs with varying levels of executive control
- ✓ A holistic view of the customer journey with case history
- ✓ Time-to-resolve metrics that promote accountability within your team
- ✓ Systematic insights on how to improve your close-the-loop process
- ✓ Best-in-class features like tagging, reassigning, side-by-side reporting, and on-page filtering
- ✓ Loyal customers who are likely to return + recommend your brand

## Without

- ✗ Wasted time with an inability to automate or streamline customer complaints
- ✗ A cookie-cutter system that lacks flexibility to fit your organization's needs
- ✗ Off-brand messaging + poor correspondence
- ✗ No visibility into what worked/didn't work in customer recovery efforts
- ✗ Loss of customer loyalty to a competitor with stronger closed-loop capabilities

# Say hello to case management or risk saying goodbye to customer loyalty

Customers have more options than ever and their expectations are sky-high. You need to provide them with exemplary service each and every time they interact with your brand. But we understand—sometimes things can go wrong.

The good news is **84% of customers who are highly satisfied with problem resolution express a high likelihood to return to the business** where the issue occurred—meaning

problems can actually be a really great opportunity to gain customer loyalty. It just takes the right tools and an air-tight close-the-loop strategy.

What strategy do you have in place to set your brand up for successful guest recovery? If you're interested in how closed-loop capabilities can help you change the way you do business, [contact us today for a demo.](#)

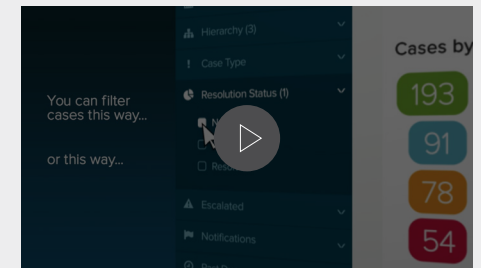
## About Service Management Group

SMG inspires experiences that improve people's lives. We are a catalyst for change, providing actionable customer, patient, and employee insights that boost loyalty and drive business outcomes. Our unique model puts a dual focus on platform technology and professional services—making it easier to collect, analyze, and share feedback and behavioral data across the enterprise. To learn more about our customer experience management, employee experience, and brand research solutions, visit [www.smg.com](http://www.smg.com).

[smg.com](http://smg.com)

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For more on SMG case management and how to build stronger customer relationships, watch the video.



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