

SHOULD WE USE A DEDICATED COMPLAINTS MANAGEMENT SYSTEM (CMS) OR CRM TO MANAGE COMPLAINTS?

It depends on the type of complaints you are looking to manage.

Some CRM systems have service modules that will cope fine with high volume, fast turnaround, low complexity issues, however more complex, in-depth cases (especially in regulated markets) require a more sophisticated case management system.

Here are some of the main arguments for a dedicated complaints management system, based on our years of experience in this field:

KEY BENEFITS OF A DEDICATED CMS	CASEWORKERS AND MANAGERS TYPICALLY NEED....	WORKPRO SCM (STANDARD COMPLAINTS MODEL)	CRM SYSTEMS OR SERVICE SUPPORT TOOLS
Purpose built for regulated complaint investigations	Regulated complaint cases are often more complex than routine consumer complaints.	Aimed at complex, in-depth investigations – when cases have multiple attributes which must be recorded, investigated and resolved.	Aimed at fast turnaround consumer issues – when customers want immediate solutions to their problem.
Flexibility within constraints	A “case” can be unpredictable. How an investigation is performed and how the case should be resolved can vary. However, cases must always comply with legislative and business rules, and consistency in handling is essential for fairness and transparency.	Workpro allows caseworkers to use their knowledge and experience to resolve a case. The system allows for flexibility in case handling, but within pre-agreed constraints. Built in workflow stages, validation rules, alerts and reminders ensure due process is always followed.	CRM systems are typically designed to deal with high volume, more standardised scenarios. The workflows, approvals and routing tend to be more rigid which can impact the productivity and effectiveness of skilled caseworkers and can lead to frustration.
Coordinate multiple case elements	Complaints are often multi-faceted (e.g. customer could be unhappy with product or service, but also with the way their complaint was handled), especially by the time it reaches an Ombudsman. In addition, multiple elements must be coordinated: evidence, correspondence, reports, stakeholders.	Cases in Workpro can have multiple subjects and involved parties allocated to them, enabling all case attributes to be captured, addressed and analysed. Workpro is case-centric – pulling everything to do with a case together in one place. All case documentation and correspondence is stored within the case record.	CRM systems allow tickets to be created (e.g. service or support requests) but classification options are often more limited. CRM systems are contact-centric - when dealing with an issue involving multiple parties, which contact do you attach a key case document to?
Multi-stage escalation	Complaint handling processes often include multiple escalation stages e.g. first complain to frontline staff, escalate to investigations team, then to Ombudsman.	Workpro SCM includes 3 stage workflow out of the box, based on a recognised best practice Standard Complaints Model (Frontline, Investigation, Review). Appropriate targets and alerts are already configured in (adjustable if required). A unique reference number is assigned to every case. Cases can be tracked at every stage, including	Many CRM systems require separate tickets to be created for each stage of the process, with different reference numbers allocated. This makes the process more complex and presents difficulties when analysing data. Customisation is required to achieve more sophisticated case management.

		reasons for escalation. Duplication of complaints is prevented.	
Pre-configured templates	Escalated complaints often require standard letters or emails to be sent to meet regulatory requirements.	Letters and emails can be sent directly from within Workpro. Standard template letters are available at relevant stages in the system, pre-populated with case data to speed up production. Templates ensure consistency and professionalism in correspondence, while integration with Microsoft Word offers full editing for any personalisation required.	CRM systems often require bespoke integration to achieve this. This can add to costs during the implementation phase
Standard Reports Set	Learning lessons from complaints is a key concern of most organisations, as is the ability to spot trends and recurrent issues so that improvements to product and services can be made.	Workpro categorises data and outcomes during the workflow stages which feeds in to reporting and analysis. A standard reports set is included with Workpro based on our experience of typical reporting requirements - and more can be added.	CRM systems must be configured to include this ability, which can add to implementation costs.

Workpro Complaints Management System

Workpro SCM helps an organisation to improve the quality of its complaints handling and reporting - while reducing associated costs and risks. It efficiently manages all complaints and enquiries in one integrated system. FOI, EIR, DP, SAR cases can be managed in the same system, and other case types can be added

Workpro is developed by Computer Application Services (CAS) Ltd. We have supplied complaint management systems since 2003, first to the Ombudsman/Regulator community, now to organisations at the sharp end of complaints handling. Our Workpro complaint management solution continues to be developed in conjunction with feedback from our users.

As an employee owned company, every team member takes a personal interest in the delivery and successful implementation of your solution. Friendly, professional and approachable, our aim is that your solution is exactly what you really need.

For more information, visit our website www.workpro.com, or call us on +44 131 449 7071.

