

# COMPLAINTS RESOLVED, LESSONS LEARNED

Workpro software helps you to better manage, resolve and report complaints casework.





## THE CASE FOR WORKPRO COMPLAINTS MANAGEMENT SOFTWARE

### IMPROVE SERVICE

#### **Convenient access**

All complaint information and activity stored and managed in one system, improving coordination and ensuring a faster response.

#### **Ownership and accountability**

Cases and tasks are assigned to named individuals. Everyone knows exactly what needs to be done next, by whom.

#### **Frontline resolution**

Facilitates early resolution where possible, with case escalation when needed, keeping costs down.

#### **Reduced handling costs**

Duplication of effort is eliminated and the admin burden is lightened - ensuring requests are processed more quickly and effectively.

### BOOST PRODUCTIVITY

#### **Prompts action**

Efficient case handling meets increasing caseload demands. Alerts and reminders prompt action, keeping everything on track and ensuring deadlines are met.

#### **Consistent, speedy correspondence**

Quality correspondence, e.g. acknowledgements, quickly produced using standardised (email and letter) templates, auto-populated with case data.

#### **Effective planning and scheduling**

Workload and performance management tools give clear visibility of case and task status and possible issues requiring attention.

#### **Improved reporting**

Scheduled and ad hoc reports easily produced using the standard reports library and flexible report creation tools.

### REDUCE RISK

#### **Consistent, compliant process**

Clear workflow guides staff so correct procedures and regulations are always followed, and complaints fairly handled.

#### **Data protection (GDPR)**

Compliance with data protection and data access laws is supported by the file management tool and workflow notifications.

#### **Lessons learned**

Analysing complaint root causes and trends helps you identify area of risk so improvements to process, product and services can be made.

#### **Security and audit**

Case data is securely stored and backed up. Authorised access only, with full chronological history of case activity.

“Our business is looking into complaints and the vast majority of LGSCO’s staff rely on an effective case management system every day, if not every hour. CAS have supported us to make our system as straightforward and simple to use as it can be, yet flexible enough to adapt to our changing business needs. Our partnership approach with CAS has been an essential component in helping us to manage a successful change programme in very challenging circumstances.”

**Nigel Ellis, Executive Director of Operations**  
Local Government and Social Care Ombudsman

## EVEN GOOD ORGANISATIONS GET COMPLAINTS. GREAT ONES LEARN FROM THEM.

**Dealing efficiently with customer complaints is one of the key ways an organisation can improve customer loyalty and retention. A customer who has complained is giving you an opportunity to put things right.**

**In addition, complaints give valuable insight into where products, services and processes can be improved.**

Workpro complaints management software will help you to deliver excellent complaint handling, ensuring all complaints are dealt with consistently, fairly and quickly.

It is a complete system for logging, processing and reporting complaints and customer feedback.

In addition, built-in FOI and data protection (DP) case types help you meet your regulatory (GDPR) data processing obligations.

The reporting and analysis tools not only speed up report production, the level of data interrogation possible in Workpro will transform management information and decision making.

Regulatory complaints reporting can be included in the library of standard reports, and ad hoc reports can be produced at any time.

We delivered our first case management system in 2003. Workpro is based on our extensive knowledge of industry best practice in case handling.

### Off the Shelf but Customisable

Workpro comes ‘ready to go’ with Complaint, FOI and DP case types already built in. However, it is also highly customisable and adaptable should you need it.

### UK Based Cloud Hosting

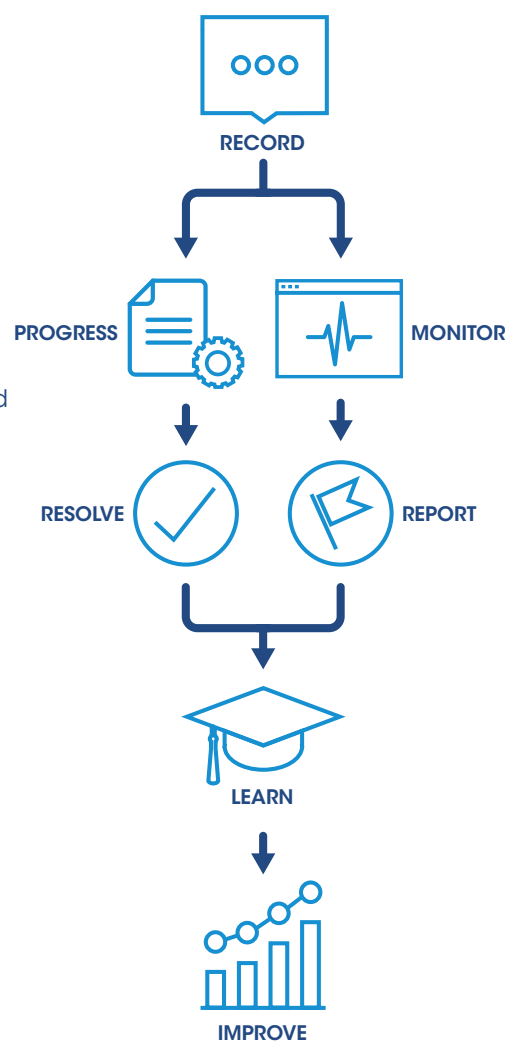
Workpro Software as a Service is hosted in highly accredited, UK based data centres with 24/7/365 security and 100% availability.

### On-Premise Option

You can also choose an on-premise system if preferred. We can deliver Workpro using Microsoft Virtualisation technology or on a pre-configured server.

### Workpro also offers:

- Industry standard data encryption
- Microsoft Office and Outlook integration
- Responsive, easy-to-use interface
- Configurable user access permissions
- API (Application Integration) tools
- Limited training required
- Free trial available.

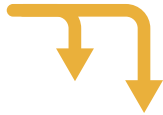


# WORKPRO TOP FEATURES



## Case Capture

Record all case details, however they come in (email, letter, web, phone, text and social media). Context sensitive input and look-up lists ensure speed and accuracy.



## Configurable Workflow

Workflow adapts to case type to guide users through the correct process at each stage. Multiple case types are supported (Complaint, FOI, DP 'out of the box').



## Alerts, Reminders and Alarms

Highly visible alerts and reminders, along with task management tools, keep cases on track. Time limits and thresholds are built in to the workflow.



## Document Management

All documentation associated with a case is held and managed in one place, with support for all common formats. Documents can be automatically created in the workflow.



## Auto-populated Templates

Professional, high quality letter and email templates promote productivity, accuracy and consistency. Correspondence is automatically populated with case data to save time.



## Case Ownership

A named person is allocated for every case and cases can be reassigned as necessary. Tasks can also be allocated to other individuals as part of an investigation.



## Real-Time Performance Monitoring

Dashboards and real-time case and task views track performance. Monitoring can be done by individual case, staff member, team caseload or across the whole organisation.



## Reporting and Analysis

All data and documents in the system can be interrogated to produce statistics or reports. This ability goes right down to document level. Everything is available for analysis.



## Quick and Advanced Search

Workpro accumulates a wealth of information. Search facilities, including precedent and linked cases, help staff access all pertinent information to make better, well-informed decisions.



## Full Security and Audit features

Access to the system or certain cases is restricted according to your company policy, protecting sensitive data. Maintains a full, chronological history of case activity.



## User Maintained Admin Tools

Administration tools allow aspects of the solution to be maintained by authorised system administrators, e.g. user permissions, lookup lists, KPIs, templates.



## File Management Utility

Supports client records management and document retention policies. Under authorised administrator control, this process can be scheduled and automated.

For more information on how Workpro case management software can help your organisation or to arrange a free demonstration:

**t:** +44 (0)131 449 7071

**w:** [www.workpro.com](http://www.workpro.com)

**e:** [info@workpro.com](mailto:info@workpro.com)