

5 Tips for Integrating your Website with your Complaints Management System



Increasingly we find companies are seeking to enable their customers to submit complaints, enquiries and issues through their website. The best approach is to feed these cases directly into an integrated case management system.

Website integration speeds up response times and reduces complaint handling costs. Customers can submit issues at times convenient to them, with prompts that make the process easy to follow, while automatic submission of complaints and enquiries into a case management system ensures the case progresses quickly and effectively through the agreed process.

Certain considerations come up every time we discuss website integration with Workpro case management software clients and we hope you find this summary list a useful starting point for your own website integration project:

1. User Journey

- **Case types and work streams**

Think about the user journey through the creation of an enquiry or complaint, and work out what options you would like to present to the user for selection and in what order.

This is more complex if you have multiple work streams. Case management systems like Workpro can handle different workflows for different case types (e.g. complaint, enquiry, compliment, Freedom of Information request etc.), so those appropriate to your organisation or business area need to be identified. The system will automatically allocate the case to the most appropriate person or department, while built in triggers ensure high risk cases are escalated quickly.

- **Validation rules**

Workflow based validation rules are essential to ensure all necessary information is captured but no more - you don't want to force people to expend unnecessary effort!

With Workpro data can be filtered to reduce the number of options presented, based on criteria such as the work stream selected (e.g. Health, HR issue etc.). Users are guided to only enter appropriate information by restricting later options based on earlier selections. This prevents them from entering incompatible information.

Validation rules will also ascertain whether the complaint is something your organisation is able to deal with, and if not the system can signpost the user to the appropriate organisation. This gives the complainant useful information and staff don't need to waste time on invalid cases.

2. Security

- **Web services**

Think about security on the site, especially if data is to be stored long term.

In Workpro's case, a web site will typically make use of one of our web services to post a case into the system. Data is stored only within the Workpro database, where it is subject to built-in procedures to make sure that you comply with Data Protection rules. Using a web service instead of the application itself means that access to the system from a web environment can be managed differently (i.e. more restrictively), and therefore is more secure.

- **Two phase commit system**

Think about a method to prevent forms from being submitted automatically by “robot” programs. We recommend using a “two phase commit” system to prevent this. In addition to automated spam filters consider using a second line manual filter, where a human decides what is to be forwarded to the case management system. This is the most effective way to prevent spammers getting through. Workpro does this simply by quarantining all new cases at “Pending” case status in a holding view, from where a team member can accept “real” cases or reject submissions, if appropriate.

3. Session logic

- **User identity**

Users submitting complaints on-line will have a much better experience if they can create a user identity that they log in to. This can be used to store a partially completed complaint that can be returned to later for completion and submission. This also allows for additional information/documentation (evidence) to be attached to the case after submission.

- **Equal Opportunities and Consent data**

Consider using the website to capture equal opportunities monitoring and consent data on-line, feeding it through to your case management system for reporting and management.

4. Data integration

- **Integrate “look up lists” into the on-line forms**

For example, if you have a full list of stakeholders, or authorities under jurisdiction, then it might be helpful to display this for the user to select from rather than entering the data free-form. This cuts down typing errors and ensures that the data is consistent in the database once entered. Workpro can supply lists of information for the website based on information held in its admin database, ensuring these look up lists are always up to date.

- **Automatic data upload**

Make sure that behind the scenes the data is going in to your case management database for use by caseworkers to progress the case.

5. Layout and Design

- **Multiple device support**

Consider the type of devices that complainants may be using and ensure that the website caters for all versions of browsers and devices, such as PCs, tablets and mobile phones for submission of complaints.

Workpro comes with a simple web page for recording complaints, which is accessible via web browsers, tablets and smart phones.

- **Web Services API**

If you prefer to integrate a complaints handling form directly into your web site, Workpro comes with a web services API. Most website design suppliers will have the tools/capability to use such APIs, but check that your preferred supplier understands and is capable of delivering this requirement.

- **Test Site**

Check that the supplier understands the need to produce a test site system to allow you to perform end-to-end user testing, i.e. submission of test complaints on the test site through the interface to a test instance where the received information can be checked.

For more information on how our Workpro case management system can help with the effective and efficient management of complaints, enquiries and issues, please call us or visit our website:

+44 131 449 7071

www.workpro.com