

# Case management

Efficiently close the loop to build stronger customer relationships

- ▶ Streamline + resolve customer issues from multiple sources
- ▶ Use in-platform response + case history tracking for a cohesive close-the-loop process
- ▶ Drive goal-oriented problem resolution with time-to-resolve metrics

Your brand's goal is to provide a great experience to every customer, every time—but sometimes things can go wrong. The good news is now it's easier than ever to take action on customer issues. Learn how case management helps you easily navigate customer problems and provide timely and efficient resolution—building stronger relationships and driving brand loyalty.

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 left on your website, complaints captured through your contact center, or issues with online ordering, you have to respond—fast.

**SMG's case management helps you efficiently close the loop with best-in-class capabilities:**

## 1. In-platform response

With a multiple-source platform feeding all customer data to your smg360 dashboard, you can easily navigate customer issues and take immediate action toward resolution. In-platform response makes communication easier than ever, so you aren't wasting precious time. Response templates provide

a great starting point, but are also customizable so you can add pertinent information that's specific to the situation.

Simply select a scripted response from the “case actions” tab, personalize your message based on the customer issue, and send. It's as easy as 1-2-3.

## 2. Comprehensive case histories

Not only is it helpful to have all the information on the customer's current issue in one place, but you'll also have access to that customer's past case interactions for a holistic view of their experience with your brand. With case history capabilities, you'll get the full picture before you jump in—armed with helpful information such as what issues that customer has had before and what actions were previously taken, so you'll know how best to respond this time. >>



### **SMG's case management**

is a centralized, multi-source platform for customer issues—providing the tools you need to promptly respond, assign, track, and resolve for an effective service recovery process.



### 3. Performance benchmarks

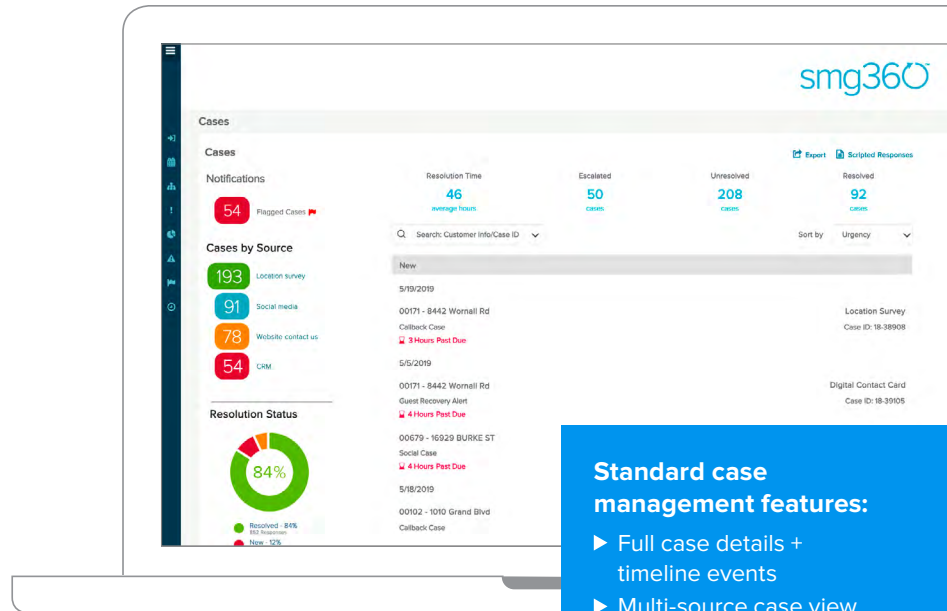
All conversations are then tracked through the platform, so you can keep an eye on progress and see it through to final resolution. Time-to-resolve metrics help you and your team stay on-track toward response goal times so you can be sure each case is being resolved in a timely manner.

If it's necessary to reassign the case, it's 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.

### 4. Productivity transparency

Case management will also provide transparency into how well your organization is handling customer issues, how those problems are being solved, and how you can improve the process. Customer complaints are a great learning tool—these real-life examples can serve as coaching situations for your field teams so they can do better next time. Having access to an organized, easy-to-use system that tracks customer issues from onset to resolution will give your brand the competitive advantage it needs to come out on top.

Our data shows that 84% of customers who are highly satisfied with their 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.



Customer expectations are high—especially when it comes to problem resolution. If an experience with your brand falls short, you only have a small window to make things right. Case management alerts you to high-priority situations—making it easier to turn insights into problem-solving action. ●

You can't afford to ignore customer issues. To find out how case management can help you streamline your close-the-loop process + drive brand loyalty, visit [smg.com/contact-us](http://smg.com/contact-us).

#### Standard case management features:

- ▶ Full case details + timeline events
- ▶ Multi-source case view
- ▶ Aggregated key metrics
- ▶ Response goal time tracking
- ▶ Customer case history search + tracking
- ▶ Side-by-side reporting of key metrics
- ▶ In-progress status
- ▶ Forwarding + reassignments
- ▶ Mobile app
- ▶ Push notifications + resolution in mobile app
- ▶ Escalations
- ▶ Tagging
- ▶ Dynamic filtering

#### Premium features:

- ▶ Scripted response templates
- ▶ In-platform email response
- ▶ Attachment support



#### 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).