Complaint Resolution Workflow (CRR-001)

Department: Customer Support & Success
Objective: Provide a standardized, transparent process for handling and resolving high-severity customer complaints that threaten retention or brand image.

Phase 1: Triage and Registration (L1 Agent)

1. **Identification:** L1 Agent identifies the ticket as a formal complaint (usually marked by frustration, threats of contract termination, or repeated unresolved P2/P3 issues).
2. **Registration:** Register the complaint in the CRM system under the **"Retention Risk"** tag and assign a **Complaint Reference Number (CRN)**.
3. **Acknowledgement:** Send a personalized (non-templated) email to the client within **1 hour** acknowledging the complaint, assuring them that a dedicated manager will take over.

Phase 2: Dedicated Manager Ownership (L2/CSM)

1. **Transfer:** The ticket is immediately transferred to a dedicated L2 Specialist or the assigned Customer Success Manager (CSM).
2. **Internal Review (The 3 Whys):** The owner conducts an internal review of the ticket history and asks:
   - *Why did the issue occur?* (Root Cause)
   - *Why was the previous resolution inadequate?* (Process Failure)
   - *Why did the client feel the need to complain formally?* (Communication/Empathy Failure)
3. **Contact:** The owner contacts the client via **phone call** within **4 hours** of ownership to verbally apologize, confirm understanding of the issue, and set expectations for the resolution plan.

Phase 3: Resolution and Internal Correction

1. **Action Plan:** The owner generates a concise, internal **Action Plan** detailing the steps (technical fix, process change, or credit offer) needed to satisfy the client.
2. **Execution:** Technical fixes are prioritized by R&D/SRE (treated as a high-P2 issue).
3. **Confirmation:** Once the technical fix is deployed, the owner confirms resolution with the client and seeks formal written sign-off ("Resolution Confirmed").

Phase 4: Post-Mortem and Prevention

1. **Root Cause Analysis (RCA):** The owner documents the full RCA, focusing on the process failures (Phase 2, Question 2).
2. **Knowledge Base Update:** If the issue was due to lack of information, a new KB article or

internal training must be created.

3. **Process Improvement:** The RCA is shared with the Head of Support to identify systemic issues and prevent future recurrence of the same failure type.