Customer Complaints and Feedback Management System

Problem Statement

Managing customer enquiries efficiently is crucial for maintaining customer satisfaction and retention. Currently, the process of handling customer enquiries can be cumbersome, involving manual data entry, tracking follow-ups, and ensuring timely responses. This can lead to delays in addressing customer issues, miscommunication, and lost opportunities for resolving customer concerns promptly.

Proposed Solution

To address these challenges, we propose an automated customer enquiry management system utilizing Google Forms, Airtable, and Make. The solution aims to streamline the process of collecting, organizing, and managing customer enquiries, ensuring timely follow-ups and improving overall efficiency.

Tools Used

- Make
- Airtable
- Zapier
- Google Forms and Google Sheets

Features of the Management System

1. Automated Complaint Management

- **Description:** An automated system to manage and resolve customer complaints.
- **Key Features:**
    - Automated receipt and tracking of customer complaints.
    - Assign complaints to agents based on predefined rules.
    - Store complaint details including customer information, complaint message, and attachments.
    - Update complaint status (e.g., Open, Resolved, In Progress).

2. Agent Notifications

- **Description:** Notify agents of new complaints and updates.
- **Key Features:**
  - Send email notifications to agents when a new complaint is assigned.
  - Include complaint details and a link to view all assigned complaints in the email.

3. Complaint Resolution and Feedback

- **Description:** Inform customers when their complaints are resolved and request feedback.
- **Key Features:**
  - Send an email to customers when their complaint is resolved.
  - Include a link for the customer to rate their experience or provide feedback.
  - Email should be styled to convey resolution clearly and encourage feedback.

4. Airtable Integration

- **Description:** Integrate Airtable to manage complaint records and automate processes.
- **Key Features:**
  - Use Airtable to store and track complaint records.
  - Implement scripts to automate the movement of complaint messages to a separate field.
  - Set the Resolved Date field to the current time when the status is updated to "Resolved."
  - Send records via a webhook to external services for further processing.

5. Webhook Integration

- **Description:** Use webhooks to trigger actions and integrate with external systems.
- **Key Features:**
  - Create a webhook to send record data to an external service.
  - Receive and handle responses from the webhook.

6. User Interface and Experience

- **Description:** Ensure the user interface is intuitive and user-friendly for both agents and customers.
- **Key Features:**
  - Clear and consistent email formatting for notifications and confirmations.
  - Easy-to-use forms and feedback links.
  - Responsive design for accessibility on various devices.

Workflow of the Management System

1. **Centralized Data Collection**
   - Use Google Forms to collect customer enquiries, capturing essential details such as Name, Email, Phone Number, Enquiry Type, and Message.
   - Responses will be automatically sent to an Airtable base for centralized storage and management.
2. **Automated Data Entry**
   - Integrate Google Forms with Airtable using Make to automate the transfer of form responses to the Airtable base, reducing manual data entry and minimizing errors.
3. **Organized Enquiry Management**
   - Set up an Airtable base with relevant fields to store and manage customer enquiries, including fields for Name, Email, Phone Number, Enquiry Type, Message, Date Submitted, Status, Follow-Up Date, and Assigned To.
   - Enable easy tracking and categorization of enquiries based on their status and type.
4. **Team Notifications**
   - Set up notifications via Slack or email to alert the customer service team of new enquiries, ensuring prompt attention.
   - Send daily summaries of pending enquiries to the team, providing an overview of the workload and prioritizing follow-ups.
5. **Automatic Status Updates**
   - Automate the process of updating the status of enquiries to 'In Progress' when a team member is assigned, and to 'Resolved' when the enquiry is addressed.
   - Maintain an accurate and up-to-date record of the status of all enquiries.
6. **Reporting and Analytics**
   - Use Airtable's reporting features to generate insights into the volume and type of enquiries received, response times, and follow-up efficiency.
   - Identify trends and areas for improvement to enhance the overall customer enquiry management process.

Expected Outcomes

1. **Increased Efficiency**
   - Streamline the process of managing customer enquiries, reducing manual effort and errors.
2. **Improved Customer Satisfaction**
   - Ensure timely responses and follow-ups, enhancing the overall customer experience.
3. **Better Team Coordination**
   - Provide the customer service team with real-time notifications and reminders, improving collaboration and accountability.

4. **Enhanced Reporting**
   - Gain insights into the customer enquiry process, allowing for data-driven decision-making and continuous improvement.

This proposed solution will address the current challenges in managing customer enquiries and provide a robust system for efficient and effective customer service operations.