Customer Escalation – Resolution Tracker

Overview

Customer Escalation – Resolution Tracker is a workflow solution built on Unifize to manage customer issues in a structured, transparent, and accountable manner.
The solution uses parent–child processes to ensure every escalation is resolved completely.

Processes Used

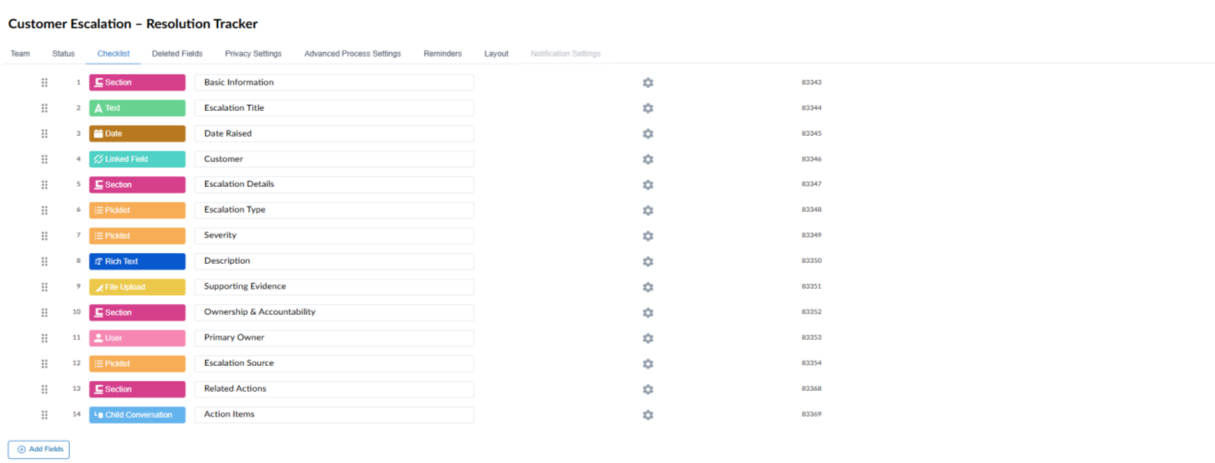
Customer Escalation (Parent Process)

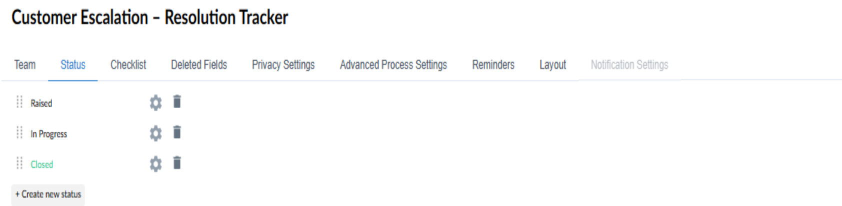
Fields Configured:

1. Escalation Title
2. Date Raised
3. Customer
4. Escalation Type
5. Severity
6. Description
7. Supporting Evidence
8. Primary Owner
9. Escalation Source
10. Action Items (Related Actions)

Status Flow:

1. Raised
2. In Progress
3. Closed





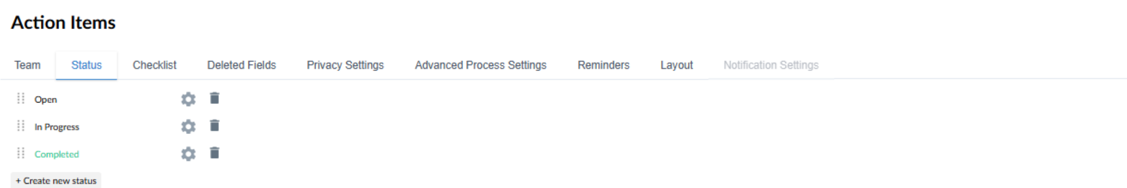
Action Items (Child Process)

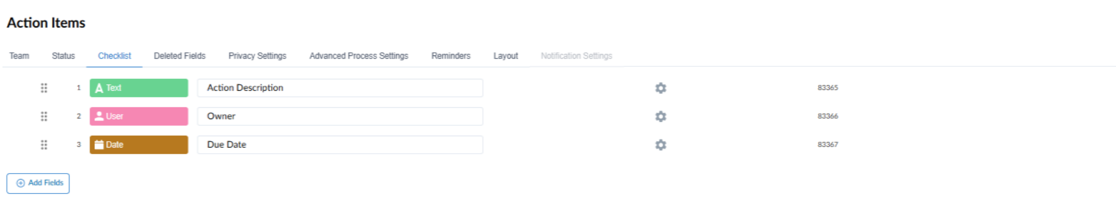
Fields Configured:

1. Action Description
2. Owner
3. Due Date

Status Flow:

1. Open
2. In Progress
3. Completed





Relationship Between Processes

Customer Escalation and Action Items are linked via Related Actions in a parent–child structure.

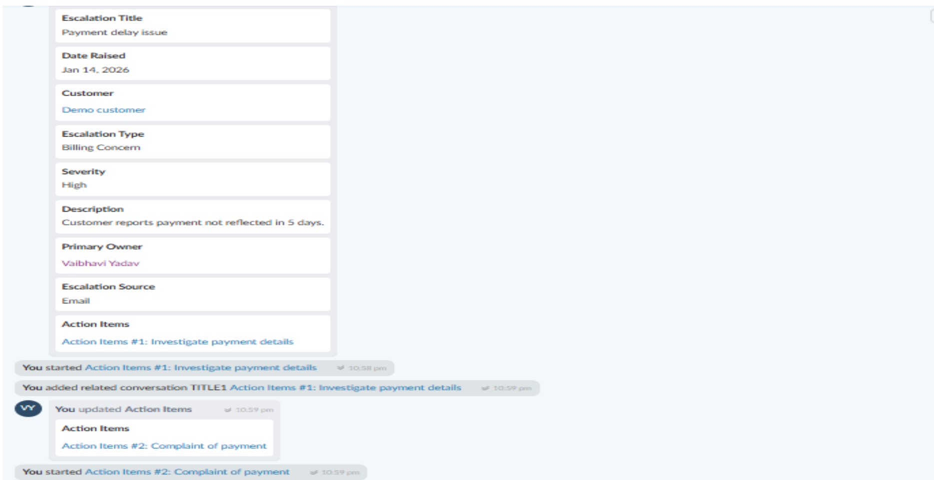
End-to-End User Journey

1. Create Escalation – Status set to Raised
2. Add Action Items – Tasks assigned with owners and due dates

3. Execute Tasks – Status updated to Completed
4. Close Escalation – Only after all tasks are completed

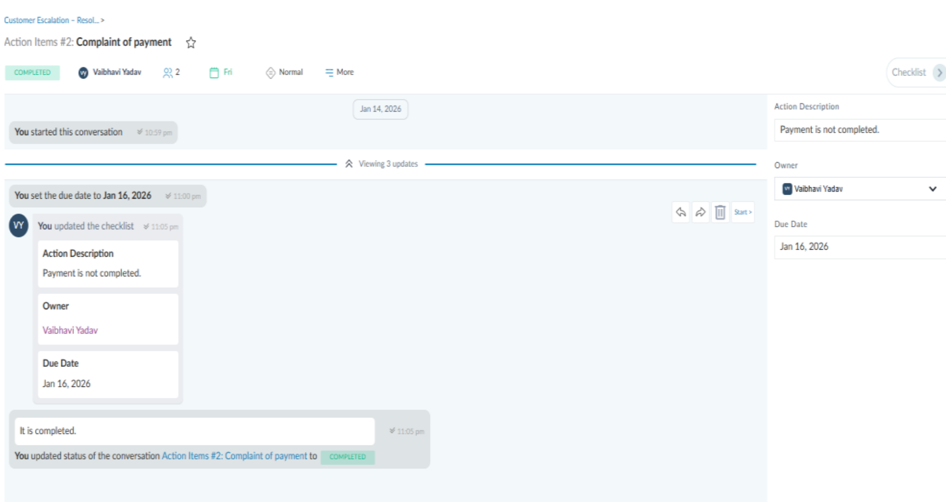
Sample Execution

1. Escalation Title: Payment delay issue
2. Type: Billing Concern
3. Severity: High
4. Customer: Demo Customer

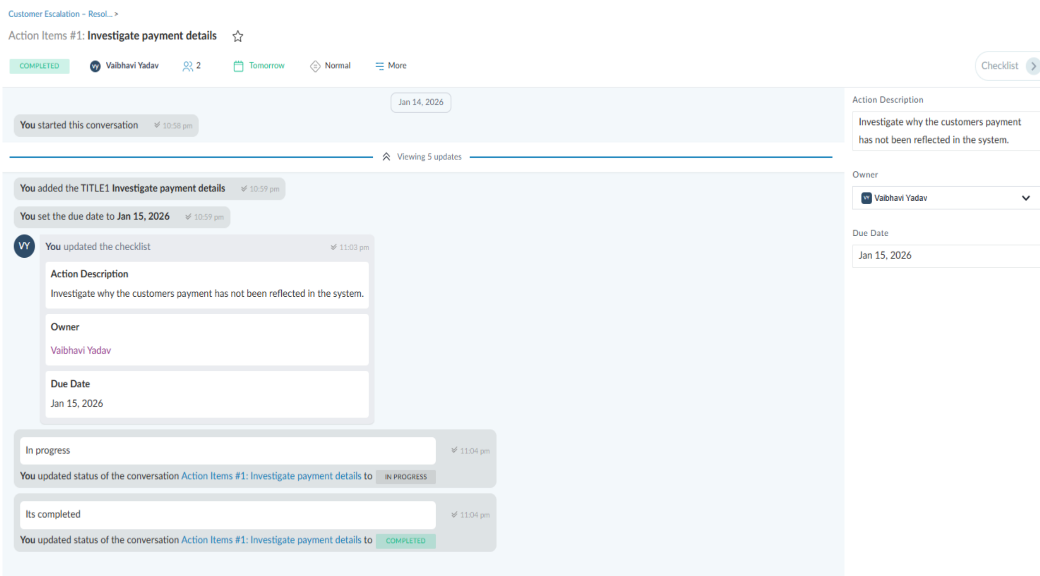


Action Items:

1. Complaint about payment



2. Investigate payment details



Key Benefits

a. Clear ownership
b. Accountability
c. Visibility
d. Scalable design
e. Structured workflow

Conclusion

The solution ensures systematic and transparent handling of customer escalations using Unifize.

Submitted by: Vaibhavi Yadav