

LEAP FOR COMPLAINTS HANDLING



powered by
FLOvate



LEAP FOR COMPLAINTS HANDLING

WHY USE LEAP FOR COMPLAINTS MANAGEMENT?



**FULLY
CUSTOMISABLE
SOLUTIONS**



**BE MORE
EFFICIENT AND
REDUCE COSTS**



**IMPROVE
CUSTOMER
EXPERIENCE**

EFFECTIVE AND EFFICIENT COMPLAINTS MANAGEMENT

Every organisation gets its share of complaints, no person, system or process is perfect. What separates good companies from the really great ones is how they deal with these complaints when they happen. LEAP for Complaints Management will allow you to track, manage and learn from all your

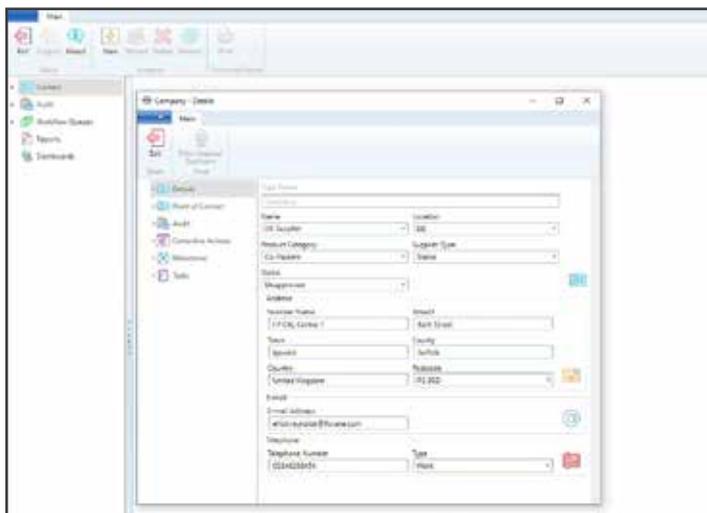
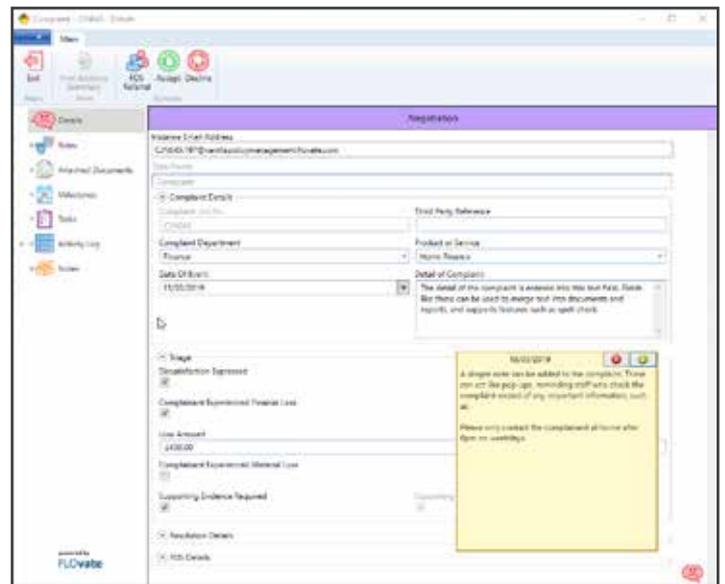
complaints, enabling you to follow industry best practices whether you follow a formal or informal process. What's more, because it is powered by FLOvate's low code system you can either utilise the standard configuration or fully adapt a solution to fit your bespoke processes.

BENEFITS



IMPROVE CUSTOMER EXPERIENCE AND INCREASE RETENTION RATES

Managed correctly, complaints can be an opportunity to not only improve the experience for future customers, but to turn the complainant into a loyal customer, in a phenomenon known as the complaint recovery paradox. LEAP allows you to track, manage and respond to any complaint, no matter where they originate, ensuring that each complaint is dealt with quickly, the customer is kept informed and you can keep your promises; changing a disgruntled customer into one who will use your service or buy your product again and again.



BE MORE EFFICIENT AND REDUCE COSTS

By managing your entire complaints process within LEAP, you can eliminate the need for multiple systems and the costs associated with them. By streamlining and optimising your complaints procedure, you will make the process simpler for your customers and employees, increasing your efficiency and reducing your management costs.

BENEFITS



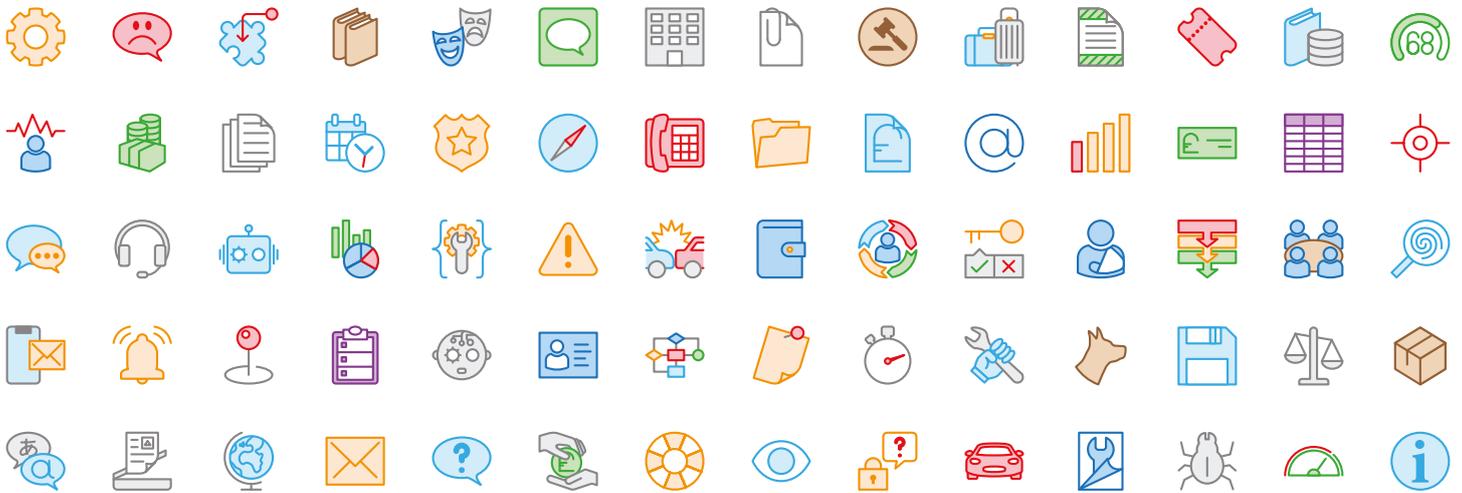
ENSURE COMPLIANCE

Track, monitor and manage key dates and timescales to ensure your compliance. Many regulatory bodies insist on strict timescales for actions such as formal acknowledgements, resolution notifications and escalations. In LEAP you can use rules, milestones and reminders to ensure that no process step or deadline is missed.

Milestone	Date	Activity	Occurred
Complaint Acknowledged			
First Reply	15/01/2019	●	●
First Reply Acknowledged	15/01/2019	●	●
First Reply Confirmed	15/01/2019	●	●
Investigation		●	
Investigation Completed		●	
Investigation Review		●	
Investigation Acknowledged		●	
Investigation Confirmed		●	
Investigation Escalated		●	
Investigation Resolved		●	
Final Acknowledgement		●	
Final Acknowledgement Received	20/01/2019	●	●
Investigation Completed	15/01/2019	●	●
Investigation Confirmed	15/01/2019	●	●
Investigation Escalated	15/01/2019	●	●
Investigation Resolved	15/01/2019	●	●
Final Acknowledgement	20/01/2019	●	●
Final Acknowledgement Received	20/01/2019	●	●

FULLY CUSTOMISABLE TO FIT YOUR PROCESS

Every customer, complaint and complaints process is different. To customise your solution, LEAP includes over 100 flexible and powerful pre-configured components, or building blocks, that can be easily joined together to build a best in class, digital complaints systems that meets your specific business requirements.



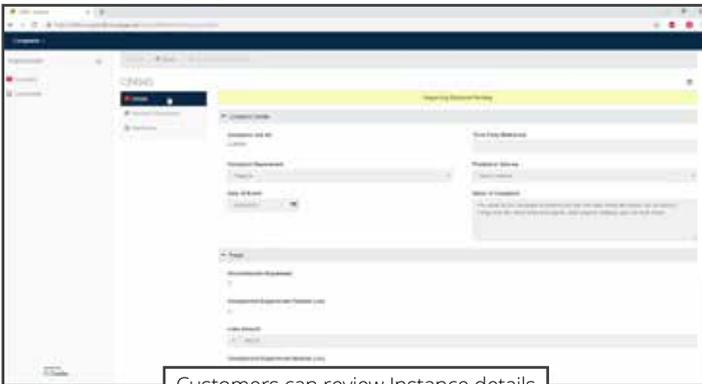
BENEFITS

EMPOWER YOUR CUSTOMERS

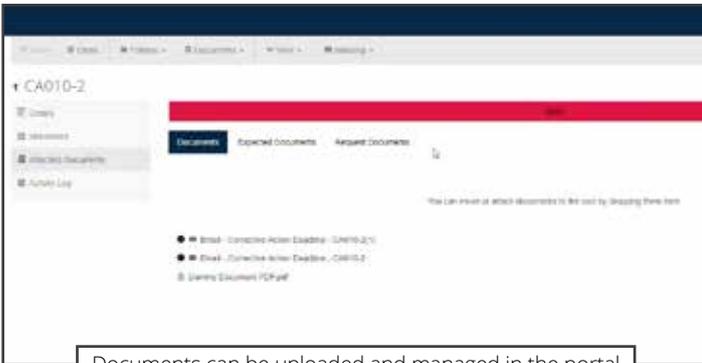
LEAP enables you to include a customer portal in your complaints system, empowering your customers and improving their customer experience. By making your complaints process easy to access, straightforward and transparent you will foster trust in your business, helping to boost customer retention.



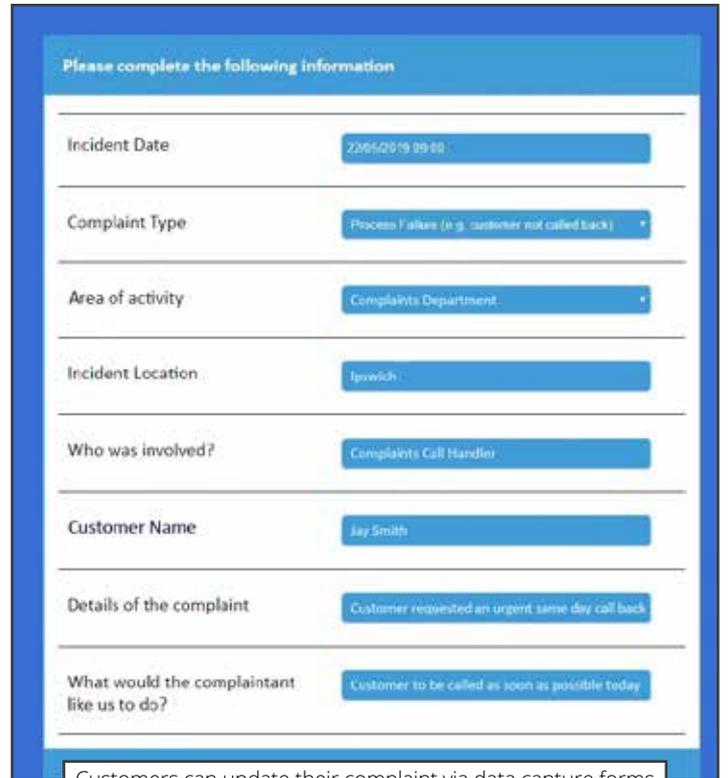
Login forms can be customised with company branding



Customers can review Instance details



Documents can be uploaded and managed in the portal

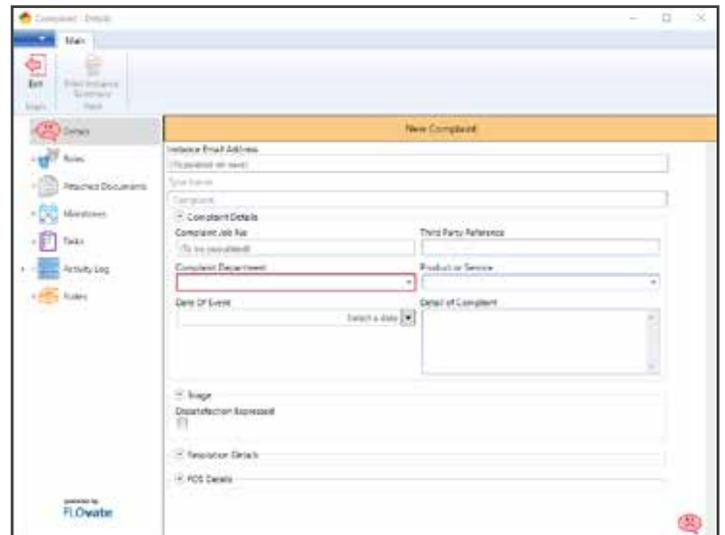


Customers can update their complaint via data capture forms

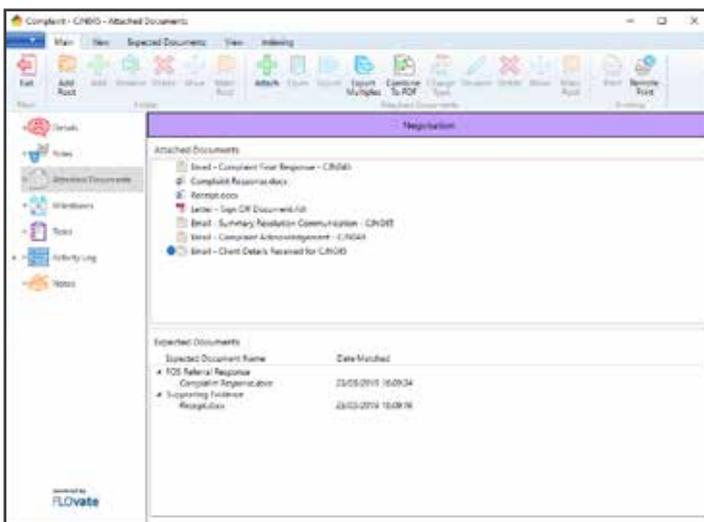
FEATURES

FIRST NOTIFICATION DATA CAPTURE

To ensure you capture all of the required information during the first notification (FN) stage, LEAP allows you to configure comprehensive data capture questionnaires with a wide range of available field types. The questionnaire can either be completed by your call handlers or sent to the complainant by email for completion, which will automatically update the record.



The screenshot shows a web-based form titled 'New Complaint'. The form includes several input fields and dropdown menus. Key fields include 'Indicate Email Address', 'Complainant Details', 'Complainant Job Title', 'Complainant Department', 'Date of Event', 'Third Party Reference', 'Production Service', and 'Date of Complaint'. There are also checkboxes for 'Stage', 'Disruption Experienced', 'Resolution Details', and 'FDC Details'. The FLOvate logo is visible in the bottom left corner.



The screenshot shows the 'Attached Documents' section of the LEAP interface. It displays a list of documents with columns for 'Expected Document Name' and 'Date Matched'. The documents listed include:

Expected Document Name	Date Matched
FOS Referral Response	23/05/2011 16:09:34
Complainant Representative	
Supporting Evidence	
Receipt Date	23/02/2014 16:09:34

DOCUMENT MANAGEMENT AND STORAGE

Ensure all communications and documents relating to the complaint, including letters and emails, are stored, sorted and easily accessible within the LEAP document library. All documents, whether created within LEAP, sent by the customer or uploaded by a team member are all together in one, easy to manage location.

FEATURES

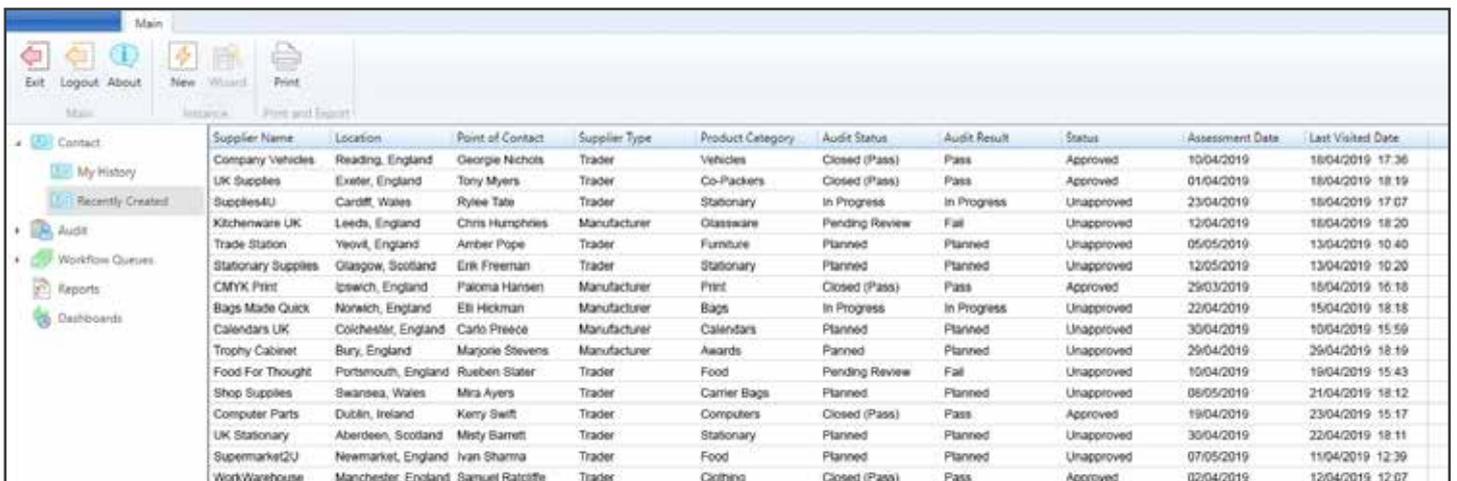
COMMUNICATION TOOLS

LEAP includes built-in communication tools, including email and SMS, that can be utilised to ensure that the complainant is kept informed of the stages throughout the process. You can even configure LEAP to send emails or SMS automatically based on event actions or time lapsed.



CONTACT DATABASE

Utilise the contact database to keep track of all contacts, including customers, suppliers, and third parties such as regulators. Within LEAP you can define what information is collected, map relationships and track all communications between your organisation and the complainant.



Supplier Name	Location	Point of Contact	Supplier Type	Product Category	Audit Status	Audit Result	Status	Assessment Date	Last Visited Date
Company Vehicles	Reading, England	George Nichols	Trader	Vehicles	Closed (Pass)	Pass	Approved	10/04/2019	10/04/2019 17:36
UK Supples	Exeter, England	Tony Myers	Trader	Co-Packers	Closed (Pass)	Pass	Approved	01/04/2019	10/04/2019 18:19
Supplies4U	Cardiff, Wales	Rylee Tate	Trader	Stationary	In Progress	In Progress	Unapproved	23/04/2019	10/04/2019 17:07
Kitchenware UK	Leeds, England	Chris Humphries	Manufacturer	Glassware	Pending Review	Fail	Unapproved	12/04/2019	10/04/2019 18:20
Trade Station	Yeovil, England	Amber Pope	Trader	Furniture	Planned	Planned	Unapproved	05/05/2019	13/04/2019 10:40
Stationary Supplies	Glasgow, Scotland	Erik Freeman	Trader	Stationary	Planned	Planned	Unapproved	12/05/2019	13/04/2019 10:20
CMYK Print	Ipswich, England	Fakoma Hansen	Manufacturer	Print	Closed (Pass)	Pass	Approved	29/03/2019	10/04/2019 16:10
Bags Made Quick	Nonwich, England	Elli Hickman	Manufacturer	Bags	In Progress	In Progress	Unapproved	22/04/2019	15/04/2019 18:18
Calendars UK	Colchester, England	Carlo Preece	Manufacturer	Calendars	Planned	Planned	Unapproved	30/04/2019	10/04/2019 15:59
Trophy Cabinet	Bury, England	Marjorie Stevens	Manufacturer	Awards	Panned	Planned	Unapproved	29/04/2019	29/04/2019 18:19
Food For Thought	Portsmouth, England	Rueben Slater	Trader	Food	Pending Review	Fail	Unapproved	10/04/2019	10/04/2019 15:43
Shop Supplies	Swansea, Wales	Mira Ayers	Trader	Carrier Bags	Planned	Planned	Unapproved	08/05/2019	21/04/2019 18:12
Computer Parts	Dublin, Ireland	Kerry Swift	Trader	Computers	Closed (Pass)	Pass	Approved	19/04/2019	23/04/2019 15:17
UK Stationary	Aberdeen, Scotland	Misty Barnett	Trader	Stationary	Planned	Planned	Unapproved	30/04/2019	22/04/2019 18:11
Supermarket2U	Newmarket, England	Ivan Sharma	Trader	Food	Planned	Planned	Unapproved	07/05/2019	11/04/2019 12:39
WorkWarehouse	Manchester, England	Samuel Ratcliffe	Trader	Clothing	Closed (Pass)	Pass	Approved	02/04/2019	12/04/2019 12:07

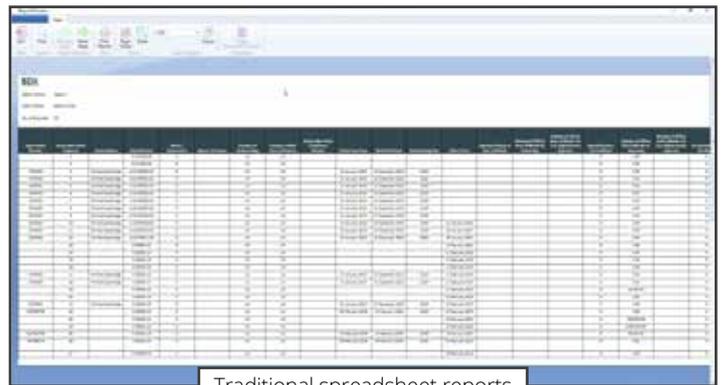
FEATURES

REPORTS & DASHBOARDS

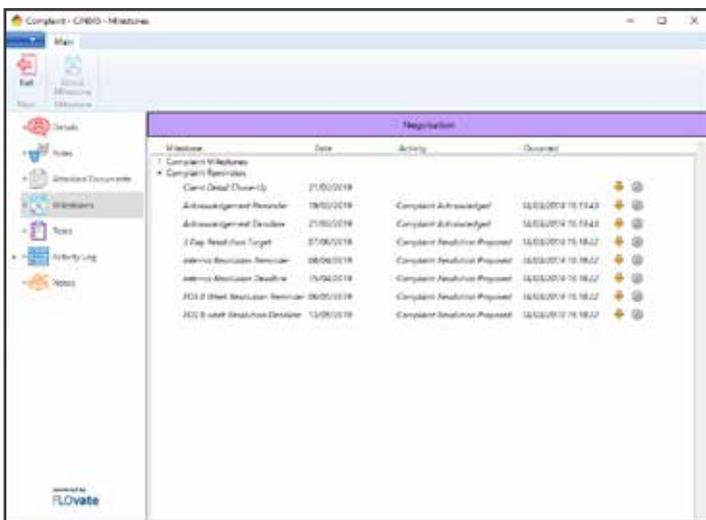
Analysing complaint data gives your organisation the opportunity to learn and to use the findings to make tangible improvements to your process and business. LEAP includes the ability to build reports and dashboards in the design studio that display and analyse data that works for you and your business.



Customisable reporting dashboards



Traditional spreadsheet reports



MILESTONES

Complaints process often have very strict time-scale requirements, mandated by the relevant regulatory boards. This means certain actions, such as formal acknowledgements and referral to the regulators, must be completed within set time limits. Milestones to track these actions can be easily managed within LEAP, they can be configured to send reminders or escalate to management when a milestone is coming up or has been missed. The milestone system can also provide a valuable audit trail.

AI FRAMEWORK

Automate decision making

Utilise the LEAP decision engine to automate decision making based on your set of rules and conditions. The rule editor can make complicated calculations and rapidly evaluate data sets to minimise the risk of human error and to improve efficiency. If a condition is not met or an error is encountered, the system will flag this to the relevant people for manual checking.

AUTHORITY TRACKING

Ensure tasks are authorised correctly

Automatically send tasks to senior team members for approval or sign off, ensuring tasks cannot be finalised without the correct permissions. Authority can be required based on field conditions, specific documents or financial information. For instance, approving holiday requests or signing off costs and invoices.

COMMUNICATION TOOLS

Utilise email, SMS and instant messaging from within LEAP

Communicate directly with your customers and suppliers from within LEAP. Using the email and SMS functions, you can send messages to your customers or configure LEAP to send them for you at predefined times or events – ensuring that you are always keeping your customer informed.

CONTACT DATABASE

Manage contact information

Keep track of all of your contacts, whether they are customers, suppliers or third parties with the contact database. Define what information is collected, show relationships between types of contact and track interactions.

CUSTOMER PORTALS

Make customers part of the process

With the Customer Portal customers can track, manage and update information as needed. Specialised web forms and permission settings means they can only view/edit as per your settings.

DATA MANAGEMENT

Capture and manage all your data

Ensure your teams enter the correct data by creating custom data captures forms. Through using the wide range of field types including check boxes, picklists, rich text and dates, whilst utilising validation rules, you can improve speed and accuracy of data capture. Minimise inaccuracies further with tools such as spellcheck, Google Maps and postcode search.

DOCUMENTATION PRODUCTION

Create and maintain a range of document templates

Ensure that letters, emails and other communications are all on brand with the LEAP template editor. Either upload Word documents or create new ones with an intuitive rich text editor and then add merge fields relating to your data within LEAP.

DOCUMENTATION MANAGEMENT

Store, manage and index documents

Keep all of the documents related to a record or incidence in one place with the Document Library. Whether they have been created within LEAP or uploaded from the user/customer, they can be indexed, searched and filtered to help improve transparency.

FINANCIAL LEDGERS

Track financial information

Keep track of financial information from within LEAP. The transactional based accounting module can create sales, purchase and nominal ledgers with a hierarchical model of ledger account codes. Use alongside the documentation and communication modules to send estimates and invoices.

MESSAGING SERVER (INTEGRATIONS)

Integrate existing applications

Through use of a messaging server and APIs, LEAP can integrate with your other systems. The messaging server acts as a distribution centre, receiving data and information from one system and sending it to the other.

REPORTS & DASHBOARDS

Interact with your data to gain valuable insights

Measure data and gain insights in real time with customisable and flexible reports and dashboards. Utilise the drag and drop function in the report design studio to create reports based on any data within LEAP and export them in Excel or Word or as PDFs. You can also schedule reports and distribute them to designated users or email addresses.

ROBOTIC PROCESS AUTOMATION

Automate tasks to maximise efficiency

LEAP can perform a range of tasks automatically and without user involvement. These tasks can be set to run periodically or as a result of another task or action. They can also trigger other tasks, based on your conditions and rules. This automation of process elements can free up time for users and improve accuracy.

SCANNING & INDEXING

Edit, annotate and index scanned documents

Documents can be scanned into LEAP and then edited and annotated before being sent to a colleague/customer or being attached to a record.

TASKWEB FOR REMOTE WORKING

Action tasks on the move

Empower team members to action tasks remotely with LEAP TaskWeb. The web-based user interface strips back any unnecessary content, allowing users to complete tasks assigned to them. For example, an engineer can enter information directly into the system or app from a site visit.

USER MANAGEMENT & PERMISSIONS

Control and manage access of LEAP

You can control how groups or individual users interact with LEAP with the LEAP permissions module. Allow users to only have access to those elements they need to perform their job, ensuring security and oversight.

WEB & DESKTOP CLIENTS

Access LEAP the way that works for your business

LEAP can be accessed through a desktop client or via a web browser and can be hosted remotely or on site. Meaning that the system can be accessed wherever you are.

PLUS ALMOST 100 MORE FEATURES



Get in touch with us today to discuss your process requirements or book a bespoke demonstration.

Call us: 0330 111 0570

Email us: solutions.team@flovate.com

Visit our website: www.flovate.com