Claims and complaints management

Bizagi Suite
# Table of Contents

Petitions, Claims and Complaints Management ................................................................. 4
Description .............................................................................................................................. 5
Objectives ............................................................................................................................... 5
- Reception ........................................................................................................................... 6
- Enter Request ....................................................................................................................... 6
- Request Type ....................................................................................................................... 8
- Send Answer ......................................................................................................................... 8
- Analyze Suggestion ............................................................................................................. 9
- Immediate Solution? .......................................................................................................... 10
- Enable Events .................................................................................................................... 11
- Enable Alarm ....................................................................................................................... 11
- Due Date Control ................................................................................................................. 11
- Send Alarm .......................................................................................................................... 12
- Cancel Alarm ....................................................................................................................... 12
- Close Case ........................................................................................................................... 13
- Extend Terms ..................................................................................................................... 14
- Send Notification ................................................................................................................. 16
- Attention and Response ...................................................................................................... 17
- Resolve ................................................................................................................................ 17
- Escalation? ............................................................................................................................ 21
- Information Complete? ....................................................................................................... 21
- Means of Notification ........................................................................................................... 21
- Contact Requester .............................................................................................................. 22
Petitions, Claims and Complaints Management

An excellent Market positioning is achieved through competitive advantages that influence consumer’s purchasing decisions and makes the difference between a company and its competition.

Nowadays, it is not a competitive advantage to constantly improve customer service, instead, it is indispensable if a company wishes to stay in business and grow into global markets.

Consumption and brand preferences are too sensitive such that the consumer is easily drawn to the competition if they feel indifference from the company about their needs and requests.

On the other hand, when your company gives its customers special treatment that is greater than their expectations, it will lead to customer loyalty, company’s brand improvement and an increase in sales and market participation.

Therefore, you need to concentrate your efforts on searching for your customer’s high satisfaction levels through faster and better answers to their suggestions and complaints. This can be achieved by focusing your resources on finding suitable responses rather than spending too much time in the management of them.

Bizagi’s Petitions, Claims and Complaints Management process template will help you to manage Petitions, Claims, Complaints and Suggestions through the definition of a clear information flow, the responsibilities of each activity required to solve them and the control of the process through traceability. The combination of the template’s features will allow you to make the correct decisions and easily identify what changes should be made in order to maintain or improve the image that your customers have about your company.
Description

The process starts when a Request is made; a Customer Service Agent receives, and classifies it as a Petition, Claim, Complaint or Suggestion.

If the Request is a Suggestion, it is entered into the system and a response is given immediately. If the Request is a Petition, Claim or Complaint, it is recorded and an immediate response is given, if possible. If not, the Agent identifies if more information must be obtained or if the case must be escalated to another area or person.

When a solution is found, it is notified by phone (if it requires special treatment or monitoring), email or letter. Then the case is reviewed to evaluate the service provided and to identify issues or inefficiencies that should be improved. Improvements can be requested via an e-mail sent to the people who are able to evaluate and implement them.

If the solution to the case should be documented in the Knowledge Base, the documentation details are recorded. Finally the case is closed.

Objectives

- Organize Request information.
- Reduce communication problems.
- Increase Claims and Complaints attention rates.
- Improve your management indicators through SLAs compliance.
- Eliminate lost Requests.
Reception

This phase covers the Request entry.

Enter Request

Description

The Request arrives via a letter, e-mail or phone call. It is received by a Customer Service Agent who enters the information into the system. If the Requester is an existing Customer, his/her details are loaded from the company’s database, if not the details are entered.

If the response to the Request is immediate, it must be recorded.

Performers

Case Resolver

Forms

1. Name: Case Opening Form

   Description: This form is used to enter the information related to the case

   ProtoType:
## Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| On exit    | First Time: This rule initializes the necessary attributes to identify that the process enters into the Resolve activity for first time  
Set opening date: This rule sets the attribute “opening date” with the current date  
Update History: This rule updates the case history with the action “Opening” and the opening date. |
Set email receiver: This rule gets the email address of the person to whom a response will be sent if necessary

**Request Type**

Description
This gateway evaluates the Request Type to resolve.

Gateways
- Suggestion: Proposed improvements to company’s products or services.
- Petition: Customer’s request related to company’s products or services.
- Claim: Customer’s claim caused by unsatisfied expectations related to company’s products or services.
- Complaint: Customer’s complaint caused by a negative perception of company’s service.

**Send Answer**

Description
An e-mail is sent to the Requester or to the person in charge of sending messages (if the notification must be sent by letter) referring to the suggestion made.

Script
Date
Mr /Mrs
<Requester>
<Address>
<City>
Subject: Response to Suggestion

Thank you for your collaboration suggesting improvements to our service. Your suggestion has been evaluated and we will be implementing it.

<Message>

We look forward to your continued cooperation in the future.

Yours sincerely

Customer Service Department.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Generate Letter: Rule to create the letter related to the suggestion response</td>
</tr>
<tr>
<td>On exit</td>
<td>Send Letter: Rule to send the letter related to the suggestion response</td>
</tr>
</tbody>
</table>

**Analyze Suggestion**

Description

In this activity, the Customer Service Boss review and analyze the suggestion.

Performers

Customer Service Boss

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The performer of this activity must be the Customer Service Boss</td>
<td>The activity is assigned to the user with the role Customer Service Boss</td>
</tr>
</tbody>
</table>
Forms

1. Name: Analyze Suggestion Form

   Description: This form is used to review the suggestion.

   ProtoType:

   ![Suggestion Form Diagram]

Immediate Solution?

Description

This gateway evaluates if the case was already resolved through an immediate solution or if it requires to be assisted.
Gateways

- Yes: The process continues to the Review and Document Activity.
- No: The process continues to the Resolve Activity.

Enable Events

Description

This gateway enables different events necessary for the case development. The first is a due date control that sends a notification to the Customer Service Department Boss to inform him/her that the case is shortly to expire. The second event is an extension of the terms of the case and finally an event is enabled if the case must be forced to close.

Enable Alarm

Description

This event based gateway enables the Due Date Alarm if a response to the Requester has not been sent.

Due Date Control

Description

Five days before the case expires, this timer event enables a path to send notification to the Customer Service Boss so that he/she reviews the case and prioritizes its attention.
## Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Set timer: Rule to set the timer duration</td>
</tr>
<tr>
<td>On exit</td>
<td>Set Boss email: This rule obtains the email address of the Customer Service Boss</td>
</tr>
</tbody>
</table>

### Send Alarm

**Description**

An e-mail is sent to the Customer Service Department Boss to notify that the case is shortly to expire.

**Script**

Dear <Department Boss>

The Request <Case Number> will expire on <Due Date>, please review the case development.

### Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Generate Email: Rule to create the email that will be sent to the Customer Service Boss</td>
</tr>
</tbody>
</table>

### Cancel Alarm

**Description**
When a response has been sent to the Requester, this event is activated automatically to disable the Due Date Alarm timer.

### Close Case

**Description**

This event is available from the time the case is created, to enable the Customer Service Boss to close it at any moment. The reason for closing the case must be entered.

**Performers**

Customer Service Boss

**Allocations**

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This event is only enabled for the Customer</td>
<td>The event is assigned to the user with the role Customer Service Boss</td>
</tr>
<tr>
<td>Service Boss</td>
<td></td>
</tr>
</tbody>
</table>

**Forms**

1. **Name:** Closing Case Form

   **Description:** This form is used to enter the reasons of the case closing

   **ProtoType:**

   

   ![Case-Closing](image-url)
## Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On exit</td>
<td>Update History: This rule updates the case history with the closing date and the action “Closing”</td>
</tr>
</tbody>
</table>

## Extend Terms

### Description

Some cases may require an extended response time. In these cases, the Customer Service Boss can extend the terms for giving a solution, entering the reasons for doing so. The means by which the notification to the Requester is to be sent must also be selected.

In order to control the resolution time, this event updates the case’s due date and the alarms sent prior to its expiry.

### Performers

Customer Service Boss

### Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This event is only enabled for the Customer Service Boss</td>
<td>The event is assigned to the user with the role Customer Service</td>
</tr>
</tbody>
</table>

### Forms

1. **Name:** Extend Terms Form

   **Description:** This form is used to enter the reasons of the terms extension

   **ProtoType:**
Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On exit</td>
<td>Update Due Date: Rule to update the due date adding the extended terms</td>
</tr>
<tr>
<td></td>
<td>Update History: This rule updates the case history with the current date and the action “Terms Extension”</td>
</tr>
</tbody>
</table>
Send Notification

Description
An e-mail is sent to the Requester or to the person in charge of sending the message (if the notification must be sent by letter) to notify the extension of the response time.

Script
Date
Mr /Mrs
<Requester>
<Address>
<City>
Subject: Time Extension, Request <CaseNumber>

We have analyzed your Request and find it necessary to extend the response time due to:
<Message>
Yours sincerely
Customer Service Department.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Generate Letter: Rule to create the letter related to the terms extension</td>
</tr>
<tr>
<td>On exit</td>
<td>Send Letter: Rule to send the letter related to the terms extension</td>
</tr>
</tbody>
</table>
Attention and Response

In this phase the necessary activities to give and notify the solution to the Request, are carried out.

Resolve

Description

This is the main process activity; here the user has 3 options to manage the Request. The first option is to request further information from the Requester. This is necessary when the information received is not sufficient to be able to provide a satisfactory solution.

The second option is to escalate the case when the case performer does not have the knowledge or sufficient resources to give a response to the Request. The case can be escalated to a person or an area.

The third option is to resolve the case, entering a response which will be notified by the means the user considers appropriate. Only one action can be executed at a time, actions are exclusive.

Allocations of this activity depend on business conditions. Initially, the activity is assigned automatically, based on the cause and sub-cause chosen in the “Receive Request” activity (See the Process Construction Document).

Hereinafter, the process can enter into this activity many times for many reasons. If the requested information was received, the case assignee will be the person who requested it; if the response was rejected by the requester, the activity will be assigned to the person who gave that solution and, if the case was escalated, the assignee will be the person in charge of the selected area (if only the area is selected) or the selected person (if a specific person is selected).

There is also a complete case history to support the management, showing the main actions that have taken place.
Performers

Case Resolver, Area Boss

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the activity is assigned for the first time, the assignee must be the</td>
<td>A rule is used to assign the activity “Resolve” according to the parameter values entered in the task “Receive Request” and based on the parameter table ASSIGN.</td>
</tr>
<tr>
<td>person responsible by the Request’s typing.</td>
<td></td>
</tr>
<tr>
<td>If more information was needed from the Requester and he/she has sent</td>
<td>There is an attribute called Resume which is set in true if a user has sent requested information to if the Requester has rejected a solution so. In these cases the process returns to the activity “Resolve” and this precondition is true so the assignee will be the current assignee.</td>
</tr>
<tr>
<td>this information or a rejection for a response has been given, the Request</td>
<td></td>
</tr>
<tr>
<td>has to be resumed by the last person that worked on it</td>
<td></td>
</tr>
<tr>
<td>When a case is escalated and an area and a person are selected, the</td>
<td>The activity is assigned to the user stored in the attribute ClaimsandComplaintsRequest.Person.</td>
</tr>
<tr>
<td>activity must be assigned to the selected person.</td>
<td></td>
</tr>
<tr>
<td>When a case is escalated but only the area is selected, the activity</td>
<td>The activity is assigned to the user with the role Area Boss and from the selected Area.</td>
</tr>
<tr>
<td>must be assigned to the person in charge of such area.</td>
<td></td>
</tr>
<tr>
<td>When a case is escalated and only an area is selected, but there is no</td>
<td>The activity is assigned to any user from the selected area.</td>
</tr>
<tr>
<td>person in this area.</td>
<td></td>
</tr>
</tbody>
</table>
charge of that area, the activity is assigned to someone of such area.

Forms

1. Name: Resolution Form
   Description: This form is used to choose the necessary actions to the case resolution.
   ProtoType:
Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Initialize fields: This rule set on null the attributes of the main form of</td>
</tr>
<tr>
<td></td>
<td>the activity “Resolve”</td>
</tr>
</tbody>
</table>
On exit

Update History: This rule updates the case history according to the business conditions

Set email receiver: This rule gets the email address of the person to whom a solution will be sent if necessary

**Escalation?**

Description

This gateway evaluates the condition related to the escalation of the Request.

Gateways

- YES: If the Request was escalated, the next task will be “Resolve”, which will be executed by the person to whom it was assigned.
- NO: The process continues to the “Information Complete?” gateway.

**Information Complete?**

Description

This gateway evaluates the condition related to the status of the Request information.

Gateways

- YES: If further information is required, the next task will be to obtain it from the Requester.
- NO: The Request solution will be notified.

**Means of Notification**

Description
This gateway evaluates the way in which information is obtained from the Requester.

**Gateways**

- **Telephone:** If the contact must be by phone, the process continues to the “Contact Requester” activity.
- **E-mail, Letter:** An Information request will be sent by e-mail or letter as selected in the “Resolve” activity.

### Contact Requester

**Description**

In this activity the Requester must be contacted by phone to obtain the information. If contact was not possible, the task performer must specify if a new contact should be made (the date to make a new call must be entered) or not. All calls must be recorded.

**Performers**

Case Resolver

**Allocations**

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The performer of this activity must be the person who currently Works on the case resolution</td>
<td>This activity is assigned to the person who currently Works on the case resolution through the expression “Current Assignee”</td>
</tr>
</tbody>
</table>

**Forms**

2. **Name:** Contact Requester Form

   **Description:** This form is used to record the calls made to the Requester.

   **ProtoType:**
### Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Initialize fields: Rule to set on null the field of the main form of the activity “Contact Requester”</td>
</tr>
</tbody>
</table>
On exit

Set mark on true: This rule is useful to show the calls history in a table distinct of the add new calls table

Update History: Rule to update the case history according to the business conditions

Information Complete?

Description
This gateway evaluates the condition related to the status of the Request information.

Gateways

- NO: If the information could not be obtained after a specified number of attempts, the process continues to the “Contact Again?” gateway.
- YES: The Request must be continued by the person resolving it.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On exit</td>
<td>Resume: Rule to set on true the attribute resume. This attribute identifies if the activity “Resolve” must be performed by the current assignee or another person.</td>
</tr>
</tbody>
</table>

Contact Again?

Description
This gateway evaluates if a new call to the Requester must be made as selected in the “Contact Requester” activity.
Gateways

- YES: If the Requester must be contacted again, a new call will be made
- NO: The Case will be closed.

Wait To contact client again

Description

If the Requester must be contacted again, the process will wait a specified time to remind the task performer to call again.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Set Timer: This rule sets the timer duration which is defined in the activity Contact Requester</td>
</tr>
</tbody>
</table>

Notify Closing

Description

If the Requester could not be contacted, a notification will be sent by mail informing him/her that the Case has been closed.

Script

Date

Mr /Mrs

<Requester>

<Address>
Subject: Notification of Case Closure

We have tried to contact you to obtain further information about your Request <CaseNumber> but without success. The history of call attempts are shown below:

<Contact Table>

Since we were unable to obtain the information, we have closed your Case.

Yours sincerely

Customer Service Department.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| On enter     | Update History: This rule updates the case history according to the business conditions.  
                | Set Email Receiver: This rule gets the email address of the requester to notify the case closing.  
                | Generate Letter: Rule to create the letter related to the case closing notification. |
On exit

Send letter: Rule to send the letter related to the case closing notification.

**Request Information**

Description
An e-mail is sent to the Requester to obtain the necessary information.

Script
Date
Mr /Mrs
<Requester>
<Address>
<City>
Subject: Information Request
We have analyzed your Request but we require the following information in order to provide a satisfactory response.
<Requested Information>

Your Request is important to us.
Your sincerely

Customer Service Department.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Send Email: Rule to create the email related to the information request.</td>
</tr>
</tbody>
</table>
Information on Time?

Description
This gateway enables two paths. The first is a Timer Event which will wait for the Requester to send the information required. The second path is an activity to enter the information. The paths are mutually exclusive.

Wait for Information

Description
This Intermediate Timer Event controls the maximum time the Requester has in which to send the requested information. If the time is exceeded, the timer will continue to the next task to notify the closure of the Request.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Set Timer: Rule to set the timer duration</td>
</tr>
</tbody>
</table>

Notify Closing

Description
If the Requester did not send the information, a notification will be sent by e-mail to inform him/her that the Request has been closed.

Script
Date
Mr /Mrs
<Requester>
<Address>
<City>

Subject: Closing Notification

As we have not received a response to our request for further information regarding your Case <CaseNumber>, we will proceed to close the case.

Yours sincerely

Customer Service Department.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| On enter     | Update History: This rule updates the case history according to the business conditions  
                              Generate Letter: Rule to create the letter related to the case closing notification |
| On exit      | Send letter: Rule to send the letter related to the case closing notification. |

Receive Information

Description

Once the information has been sent by the Requester (through any means), it must be entered into the system by the person who requested it so that the case resolution can be continued.

Perfomers

Case Resolver
Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The performer of this activity must be the person who currently Works on</td>
<td>This activity is assigned to the person who currently Works on the case</td>
</tr>
<tr>
<td>the case resolution</td>
<td>resolution through the expression “Current Assignee”</td>
</tr>
</tbody>
</table>

Forms

1. Name: Enter Information Form

   Description: This form is used to enter the information sent by the Requester

ProtoType:
Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On exit</td>
<td>Update History: This rule updates the case history according to the business conditions. Resume: Rule to set on true the attribute resume. This attribute identifies if the activity “Resolve” must be performed by the current assignee or another person.</td>
</tr>
</tbody>
</table>

Contact by Phone?

Description

This gateway evaluates the means by which the Requester is to be contacted to inform him/her of the Solution to the Request, as selected in the “Resolve” activity.

Gateways

- YES: If the Solution is to be notified to the Requester by phone, contact will be attempted.
- NO: The Solution will be sent by e-mail or letter.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Set Resolution Date: This rule assigns the current date to the attribute “Resolved Date” if the case was resolved. Generate Letter: Rule to create the letter related to the case resolution if necessary</td>
</tr>
</tbody>
</table>
Send Response

Description
An e-mail is sent to the Requester or to the person in charge of sending the message (if the notification must be sent by letter) to notify the solution to the Request.

Script
<Date>

Mr / Mrs

<Requester>

<Address>

<City>

Subject: Case <CaseNumber>

In response to your Request of <Date>, we are pleased to inform you of the following solution:

<Request.Solution>

<RequestSolutionFile>

Yours sincerely

Customer Service Department.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On exit</td>
<td>Send Letter: Rule to send the letter related to the case resolution notification</td>
</tr>
</tbody>
</table>
Contact Requester

Description

The Requester must be contacted to inform him/her of the solution to the Request. If contact was not possible or monitoring of the solution is necessary, the user must specify if a new call should be made and enter the date and time to do so.

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The performer of this activity must be the person who currently Works on</td>
<td>This activity is assigned to the person who currently Works on the case</td>
</tr>
<tr>
<td>the case resolution</td>
<td>resolution through the expression “Current Assignee”</td>
</tr>
</tbody>
</table>

Forms

1. Name: Contact Requester Form

   Description: This form is used to record the calls made to the Requester.

   ProtoType:
Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Initialize fields: Rule to set on null the field of the main form of the activity “Contact Requester”.</td>
</tr>
</tbody>
</table>
On exit

Set mark on true: This rule is useful to show the calls history in a table distinct of the add new calls table.

Update History: Rule to update the case history according to the business conditions.

Contact Again?

Description
This gateway evaluates if another call should be made to the Requester.

Gateways

- YES: If the Requester must be contacted again, a new call will be made.
- NO: The solution is sent by e-mail or letter.

Solution Notified?

Description
This gateway evaluates the results of the contact.

Gateways

- YES: If the solution could be notified, its effectiveness is evaluated.
- NO: The process continues to the "Contact Again?" gateway.

Wait to contact Requester again

Description
If the Requester must be contacted again, the process will wait a specified time to remind the task performer to make the call.
Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Set Timer: Rule to set the timer duration.</td>
</tr>
</tbody>
</table>

**Satisfactory Solution?**

Description
This gateway evaluates the condition related to the solution.

Gateways

- **YES**: If the solution was satisfactory, the Customer Service Department will review the Request development.
- **NO**: The Request must be resumed by the person who suggested the solution.

Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On exit</td>
<td>Update History: Rule to update the case history according to the business conditions.</td>
</tr>
</tbody>
</table>
Review and Closure

In the last phase of the process, the development of the Request is evaluated to control the quality of Customer Service. The solution is documented and necessary improvements are identified.

Review and Document

Description

In this task, the Customer Service Department reviews the Request and records the details of the documentation in the knowledge base, if necessary. Optionally, if preventive or corrective improvements are necessary, a notification can be sent to the appropriate person so that he/she evaluates their feasibility.

Performers

Customer Service Boss

Allocations

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The performer of this activity must be the Customer Service Boss</td>
<td>The activity is assigned to the user with the role Customer Service Boss</td>
</tr>
</tbody>
</table>

Forms

1. Name: Review Form
   Description: This form is used to display the case summary and enable the case documentation and the request of improvement actions

   ProtoType:
Request Improvement Action?

Description

This gateway evaluates the condition related to the Improvement Actions Request.
Gateways

- YES: If preventive or corrective improvements are necessary, a notification will be sent
- NO: The Request is closed.

**Send Improvement Request**

Description

An e-mail is sent to the appropriate person to request improvements that can reduce rates of claims, complaints or petitions.

Script

Dear <responsible person>

We are always trying to improve our Customer Service. Our analysis of the Request shows that the following actions should be implemented to improve the process:

<Improvement Action>

We appreciate your help in this respect.

Yours sincerely,

Customer Service Department.
## Actions

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On enter</td>
<td>Generate Letter: Rule to create the letter related to the improvement action request.</td>
</tr>
<tr>
<td>On exit</td>
<td>Send Letter: Rule to send the letter related to the improvement action request.</td>
</tr>
<tr>
<td></td>
<td>Update History: Rule to update the case history according to the business conditions.</td>
</tr>
</tbody>
</table>
Performers

Case Resolver (Role)
Person who attends and solves Petitions, Claims and Complaints.

Customer Service Boss (Role)
Person in charge of the Customer Service Department.

Area Boss (Role)
Person who manages and assigns cases in his/her area.