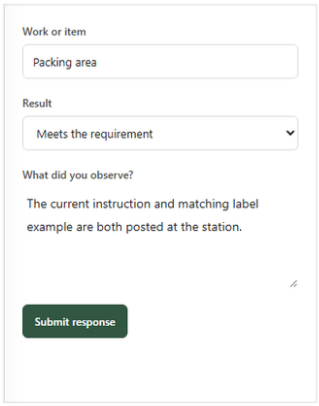
RESOLVE A CUSTOMER ISSUE AND CLOSE THE LOOP

Close the customer conversation and carry recurring causes forward

Record what the customer was told and whether they are satisfied or escalated, then route a recurring cause into nonconformance work.

Log the issue > Resolve and record > Close the loop with the customer

SkillSmith · Share an observation through a published form



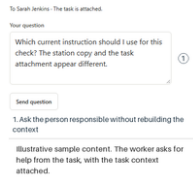
1. Record the observation where work happens

Illustrative sample content. A worker can use a published form to share an observation without an assigned task.

SkillSmith · Carry the earlier incident response into the investigation



SkillSmith · Ask for help with the task attached



Share an observation through a published form

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Person raising the issue	Log the issue	Respond with customer, immediate action, order or job and photos.
Assigned team member	Resolve and record	Respond with goodwill within policy, resolution and time.
Team lead	Close the loop with the customer	Respond with customer informed, nonconformance raised? and satisfied / escalated.

Carry the recurring cause into follow-up work

In a worked example, the immediate response is delivered but a recurring cause remains; record the customer communication and hand the systemic issue to nonconformance work.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Issue	Open the selected material for this occurrence.
Recorded response	customer informed, satisfied / escalated and nonconformance raised?	Save the response with its work context.
Review point	satisfied / escalated and nonconformance raised?	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Resolve a customer issue and close the loop

Bring issue into the prepared work. Person raising the issue, Assigned team member and Team lead each receive the context needed for their part.

01 Log the issue

Record customer, what happened, order or job, photos and immediate action.

02 Resolve and record

Record resolution, goodwill within policy and time.

03 Close the loop with the customer

Record customer informed, satisfied / escalated and nonconformance raised?.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Resolve a customer issue and close the loop

A complaint or service failure is logged where it happens, resolved by the person who can, and closed with the customer - with systemic causes handed to quality.

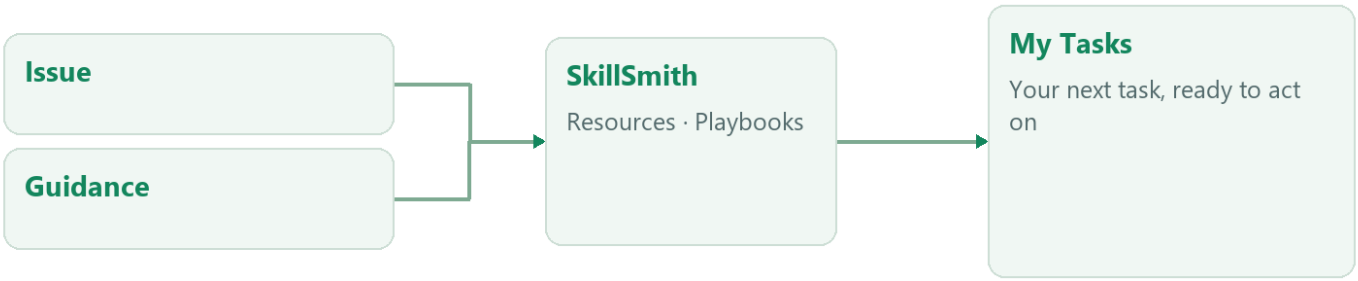
Store customer issues · Retail

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Issue The task uses this material	The customer issue form.
Guidance The task uses this material	Service recovery guide and goodwill limits.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose issue from the resources your team uses.

02 Agree the responsibilities

Confirm person raising the issue, assigned team member and team lead for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Choose the task, eligible recipients and deadline, then walk through the actual response fields.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains customer informed, satisfied / escalated and nonconformance raised?. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring issue. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do people receive the prepared work?

Select the prepared task and the relevant recipients when assigning work. Making a playbook available to a group and giving a person a task are separate setup choices.

What is the outcome for the wider workflow?

Customer informed; resolution recorded; systemic causes handed to NONCONFORMANCE.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The next person receives an action without the preceding result.	Keep the preceding result attached when the next responsible person receives work.
Known case details are requested again at the next handoff.	Carry known context forward and show the decisions needed for this task.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- What was communicated to the customer, and does the cause need separate work?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact