



WORKPRO COMPLAINTS MANAGEMENT SOFTWARE

Complaints resolved

Lessons learned

Workpro Complaints is a complete case management solution. From simple issues to complex investigations, Workpro gives you complete visibility and control of every part of the process, ensuring fair and consistent treatment for every customer.

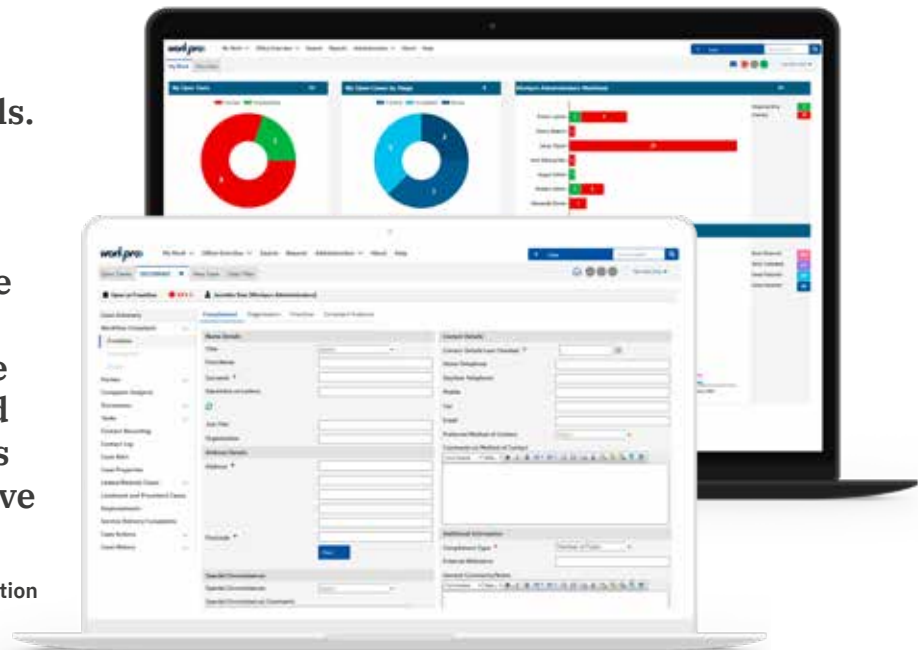


All organisations get complaints. Great ones learn from them.

Workpro is cloud based software, hosted in secure UK based data centres. It is easy to use, cost-effective and specifically developed, with input from complaints professionals, to meet the demands of complaints casework.

“Workpro empowers us to do the things we need to do as an organisation and as individuals. It mirrors our approach to casework. You are free to use your own initiative, while keeping to the things that have to be done. It’s so flexible but we can really funnel use of the system through validation and field labels. Workpro allows us to be as consistent and directive as we want to be”

Chris Harrison, Performance and Business Information Analyst, Housing Ombudsman.



Consistency

- **Everything in one place** improves case coordination and eliminates duplication.
- **Built-in workflow steps** ensure consistency and fairness in complaints resolution.
- **Templates reduce errors**, save time, and ensure professional correspondence.
- **One source of the truth**, enables colleagues to quickly pick up cases and queries.
- **Reliable data collection** and meaningful categorisation feeds accurate reporting.

Control

- **Case status and team performance** can be monitored in real-time against targets.
- **Clear visibility of who needs to do what**, with alerts and reminders to prompt action.
- **Dashboards highlight issues** so that remedial action can be taken.
- **Cases can be easily re-assigned** due to staff absence, for example.
- **Spot trends and analyse root causes** for improvement initiatives.

Compliance

- **Clear workflow guides staff**, so regulations and your policies are always correctly followed.
- **Notifications and alerts** ensure vital information and deadlines are not missed.
- **File management tools** ensure compliance with data protection and data access laws.
- **Chronological audit trail** guarantees full accountability and transparency.
- **Management reports** are easily generated from the built-in standard reports library.

The solution:

Workpro Complaints features

“The team members are absolutely delighted with Workpro. It is intuitive and user friendly and you can easily work through the steps.”

Stephanie Dunn, TSB Bank.

Log & track all casework



Complaint Capture

Quickly record all case details, however they come in (email, letter, web, phone, text and social media).



Configurable Workflow

Adapts to case type and guides users through correct process at each stage. Includes Complaint and FOI/data protection case types.



Document Management

Store all documentation in the case record and easily bundle for sharing. Optional PDF editing and redaction.

Management information



Reporting & Analysis

Built-in standard reports library and flexible report writing tools. Well categorised data ensures accurate, meaningful reporting.



Performance Monitoring

Track casework using comprehensive dashboards, case and task views, with any issues highlighted.



Quick and Advanced Search

Everything is searchable, down to document level, with flexible filtering. Linked Case or Precedent Case tags.

Respond & resolve



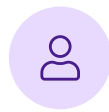
Alerts & Reminders

Highly visible alerts, reminders and tasks drive action, while any vulnerabilities or risks are flagged.



Auto-populated Templates

Email and letter templates are auto-populated with case data, with seamless MS Word integration.



Case & Task Ownership

Allocate and reassign case owners for full accountability. Tasks can be manually or system-generated.

Security & maintenance



Access & Audit

Authorised access only, with case-level restrictions. Full audit trail. Data encryption. Single sign-on option. UK based, ISO 27001 data centres.



User Admin Tools

Key system elements are maintainable by authorised administrators. e.g. lookup lists, fields, user permissions.



Data Protection

Integral file management utility lets you manage data and records according to data protection policies.



Complete control of your customer complaints. It all begins here.

Find out more about [Workpro Complaints Management Software](#)
Or email us for a free demo at workpro@casltd.com



Workpro case management system is developed by
CAS - an employee-owned technology company.
www.workpro.com

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