

Resolution Tracking: How it Works

Unfortunately we all get them - detractors. To identify service concerns, and hopefully resolve them we've developed a tracking method to organize and keep your team all on the same page. By default all detractors are automatically set as an issue that requires action to be taken.

The Process Step-by-Step:

1. A survey respondent gives a rating of 6 or lower
2. Their response automatically gets marked as "Needs Attention"
3. An email notification is sent with the respondent's feedback and options for how to resolve the issue
4. Take action to resolve the issue (ex. Phone call or email from Account Manager)
5. Issue is resolved and closed in myInavero

Email Notifications

A client who rates you a 6 or lower is considered a detractor and as a result you'll receive an email notification with the survey responders full contact information, as well as their survey response.

Setting a Resolution and Adding Notes

You can set a resolution and add notes directly from the email notification or you can login to MyInavero and complete the same actions within the online tool. Within the online tool you can also view past responses, resolutions, and notes.

The Importance of Notes

At every step of the process it's important to add a note, as a resolution status is only as valuable as it's supporting notes. Notes provide your team with an update on each client and provide a history of the issue which will speed up response times.

Resolution Tracking Status Options: What's in a Name?

We have 5 resolutions status options, the status you'll use the most is Resolution in Progress and (hopefully) Resolved. However, the other status options are also important to understand and utilize when necessary.

1. Resolution in Progress

This status is set when one of your team members has taken action and are currently in communication with or waiting to hear back from a client. Notes here are very important to connect your team with how you're progressing with any issues. Once Resolution in Progress is set, this is considered an active issue.

2. Can't Resolve

This status is set after a significant amount of communication between you, your team, and the client has ended and all parties cannot come to an agreement on how to fix an issue. Once Can't Resolve is set, this is considered a closed issue.

3. Not an Issue

This status is set if the survey response does not require any action. For example this resolution is generally set when someone provides feedback along the lines of "I haven't worked with your company enough to provide an educated rating" or "new relationship, too early to tell". Once Not an Issue is set, this is considered a closed issue.

4. Resolved

This status is a secondary resolution and should almost always be set after Resolution in Progress. Resolved ideally equates to the client is happy and we have addressed and fixed the issue, or if you can't fix it you've been able to develop a process to make sure it doesn't happen again. Once Resolved is set, this is considered a closed issue.

5. Escalate

This status is set when resolving an issue requires leaderships involvement. This resolution option will send an automatic email notification directly to the highest in command and will include the survey responders contact information and response. Once Escalate is set, this is considered an active issue requiring immediate action.

Resolution Tracking: Email Notifications

Jane Doe

Director: Eric Gregg › Nathan Goff
Email: janedoe@email.com
Phone: 555-123-4567
Company: ABC Company
Tags: Portland, Industrial, Top 100

Based on your most recent experience, how likely is it that you would recommend us to a friend or colleague?

6

What is the primary reason behind the rating you provided?

Nathan wasn't as responsive as he has in the past.

What is one thing we could be doing differently to increase the value of our services to you?

No Response Provided

Choose a resolution after following up:



[Resolution in Progress](#) | [Can't Resolve](#) | [Not an Issue](#) | [Resolved](#) | [Escalate](#)

Why am I getting this email?

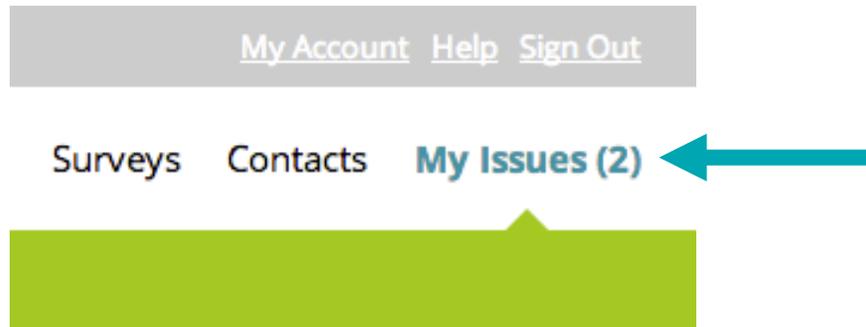
Your account is configured to send an email every time a new survey is received with a score of **6 or lower**. To change this edit your Notification settings under the Account tab.

What is a Net Promoter Score?

It is a common satisfaction metric used to understand how satisfied your clients are, [learn more here](#).

Resolution Tracking: My Issues

Within MyInavero, there's a section built specifically for you and the issues you're managing. At a glance when first logging into MyInavero in the top right screen you'll now quickly see how many Open issues you're actively working.



By clicking directly on My Issues you'll be directed to a page where all of the Issues you have access to all sorted into three categories: Flagged - Need Attention, Open and Closed.

From here you'll be able to quickly assess the feedback and take appropriate action. Ideally you would take your first action within the first 2 days of a response being marked as "Needs Attention" and have all Open Issues closed within two weeks.

My Issues

This page displays all Issues assigned to you and any other survey responses flagged as needing attention.

Flagged Responses (13)	+
Open (2)	+
Closed (0)	+

My Issues: Advanced Settings

There will be times while managing resolutions that you'll find that an issue cannot be resolved by you and should be assigned to someone else. From either the detractor email or from MyInavero you can reassign an issue to the appropriate person within your organization. Additionally, you have the option to follow the progress of the issue (as well as add other followers) and receive email alerts when the issue status has been updated.

Issue Resolution

Apr 24, 2014

Eliza Lincoln submitted a response in survey "Quarterly Survey 1"

SET ISSUE STATUS

Select Status

ASSIGN ISSUE

Bridget Harper

Enter an email address

ADD ISSUE FOLLOWERS (RECEIVE EMAIL UPDATES)

Choose users or enter email addresses to get updates on this issue

Type in some notes... (required)

Create Issue

Once you reassign an issue, an email will be sent notifying the new lead who will be resolving the open issue.

With these new steps in place, the ability to record, track and update the progress will streamline the entire process of handling detractors.