

10-Point Checklist: Integrated Intake & Complaint Resolution System

A professional, multi-channel framework to manage incoming requests and complaint resolutions with precision and accountability.

☐	1. Standardize Multi-Channel Intake: Use a unified system to capture inquiries and complaints from all sources (website, phone, or reception) to ensure every contact is logged and assigned a tracking ID.
☐	2. Differentiate by Category: Clearly categorize incoming contacts into "New Requests" (inquiries, leads) or "Issue/Complaint Resolution" (problems, feedback) at the point of entry.
☐	3. Define Qualification Criteria for Requests: Capture essential data points (scope, timeline, and service requirements) to accurately assess the fit of new requests during the initial intake.
☐	4. Establish Severity Criteria for Complaints: Define clear markers for complaint severity to ensure that urgent or high-stakes issues are automatically escalated to leadership.
☐	5. Automate Acknowledgment: Trigger an immediate, professional acknowledgment receipt for both requests and complaints, providing the client with a reference number and an expected timeline for a personal follow-up.
☐	6. Centralize Case Management: Manage all open cases in a single database that tracks status, ownership, and current progress for both service requests and resolved complaints.
☐	7. Maintain Communication Transparency: Implement a policy for regular status updates (e.g., every 24–48 hours) to keep the client informed, particularly while an investigation or a proposal is being prepared.
☐	8. Ensure Formal Closure: Require a formal "closed" status for both tracks—a confirmed delivery for requests, and client satisfaction verification for complaints, specifically, proactively contact clients to confirm their level of satisfaction with how their complaint was handled.
☐	9. Conduct Post-Interaction Audits: Perform a brief internal review after both significant interaction sign-offs and complaint resolutions to identify process gaps.
☐	10. Integrate Insights into Strategy: Regularly analyze your aggregate data on both request trends and complaint patterns to refine your service offerings and operational standards.

BTensure is your partner to implement the changes smoothly and successfully