

Closing Escalations

Who can close escalation tickets?

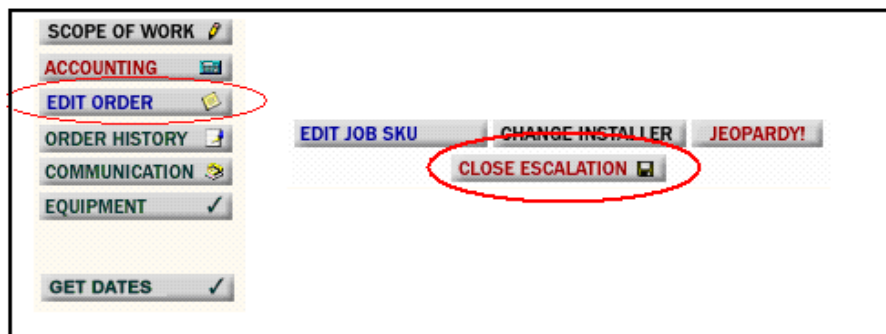
1. Installs / NAL Group
 - a. TRA and Field Management
 - b. Resolution Care Phone 2 (Client Services)
 - c. Resolution Care Back Office team
 - d. Resolution Care Supervisors and Team Leads

When to close an escalation ticket

When the issue has been resolved by a member of NAL Group's team. We can also close escalations when there is not contact after the third attempt to contact the customer or when there is not longer an issue for our team to resolve (e.g. the customer was able to solve their own issue).

Steps to Close an Escalation Ticket

1. Click on **Edit Order**.
2. Click on **Close Escalation**.



3. Complete the following fields to enter the escalation information.

Note: If there is more than one escalation ticket, choose the appropriate escalation.

 - a. **Resolved By:** Always select **INSTALLS Inc** for every escalation that you are closing out.
 - b. **Final Responsibility:** This field determines who is responsible for the issue that caused the escalation. Your choices for this field are: client, customer, installation company, or INSTALLS inc. See Index 1.
 - c. **Final Responsibility Reason:** Choose the escalation reason that best matched the cause of the customer's issue.
4. Click on the **Close** button to close the escalation ticket.

Date Opened	Title	Escalator Name	Escalator For
08/12/2016	Customer	JOSEPH SYLVAIN	Installer
Resolved By	Final Responsibility	Final Responsibility Reason	
INSTALLS inc	Installation Company	Technician - Unprofessional - DID NOT FOL	

Add Closing Notes:

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Closing Escalations

Client Final Responsibility Reasons

- Client Caused Service Issue
- Client Caused Scheduling Issue
- Customer Unhappy with store experience
- Opened in error
- Product Issue
- Wrong expectations set with customer
- Wait time at pick-up location

Customer Final Responsibility Reasons

- Buyer's remorse
- Outside of install warranty
- Unreasonable service explanation
- Unresponsive to Installs Inc
- Customer User error
- Site not prepared
- Customer Requests Sooner Date
- Installs, INC. denied – Damage Claims Only
- Installs Insurance claim denied – Damage Claims Only
- Servicer Insurance claim denied – Damage Claims Only

INSTALLS inc Final Responsibility Reasons

- Failure to Update
- For tracking purposes only
- Opened in error
- Sooner Dates – Found
- Sooner Dates – Not Found
- Apologize, No Incentive
- Incentive Offered
- Installs Paid Direct – Damage Claims Only
- Servicer Paid Direct – Damage Claims Only
- Servicer Carrier Paid – Damage Claims Only
- Installs Carrier Paid – Damage Claims Only
- Case Dismissed – Damage Claims Only

Installation Company Final Responsibility Reasons

- Didn't Update Job Status After Appointment
- Product Issue
- Company-Refusal to warranty
- Damage to Customer Property/Product
- Services Not Complete or Below Standard
- Technician-No-Call No-Show
- Unresponsive
- Failure to upload proper document
- Unprofessional Behavior / Dress Code / Vehicle
- Didn't Notify Installs for Job Exception
- Technician- Unprofessional – Unfamiliar with Product/Installation
- Leak- Installation Related
- Leak- Non Installation Related
- Store Servicer Rejected Job
- Didn't Provide An Appointment Window or ETA

Key Reminder

Working Escalations: Escalations need to be addressed in a timely fashion in order to maintain the lines of communication that allow the issues involved to be successfully addressed or resolved. New escalations need to be addressed the same day they are opened. They then need to be updated every 24 hours and the issue should be completely resolved in a reasonable time frame.