Customer Service Escalation Process
Social Media Processes

Process Document Information

Current Information

Current document revision: 1.2
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Document History

Name	Date	Revision	Notes
Vincent Tobias		1.0	Initial Document
Vincent Tobias	10/16/2017	1.1	Revised version
SMRT/Vincent Tobias	4/26/2018	1.2	Revision: Updated tags, POC and scenarios added

Document Title: Social Media Customer Service Escalation Guidelines

Introduction

This document provides clear guidance on what the Social Media Team must do when escalating Technical Support cases.

Overview

On social media, we monitor a lot of conversations. Most are technical support related and knowing when and how to escalate these cases is important. This guide will help Social Media Coordinators on how to escalate Technical Support cases accordingly.

SOCIAL CUSTOMER SERVICE ESCALATION

Objectives:

- Document the Generic engagement guidelines to promote ease and sensitivity when responding to Social Media posts from customers;
- Define the elements of the qualification process;
- Create a venue for process improvement by ensuring there are existing documents that will be subject for audits/reviews.

Scope:

- All Junior Coordinators, Social Media Leads/Points of Contact, and Team Captains for Belkin, Linksys and Wemo Customer Service Support teams

Responsibilities:

- Junior Coordinators – to identify which Support Group to escalate the case to
- Social Media Leads/Points of Contact & Team Captains – Possess an in-depth understanding of the Social Media support. They assist our clients in the rollout of social media strategies by ensuring guidelines and procedures are properly observed.

Coverage:

Cases transferred from the Social Media Reponse Team to Customer Service Department

Escalation Groups

BRAND	REGION	QUEUE / ESCALATION POINT
Linksys, Wemo, Belkin Net	US and Canada	Customer Service NA
	Australia and New Zealand	CS-ANZ
	Asia Pacific	CS-APAC
	Europe and Middle East	CS-EMEA
	India	CS-India
	Latin America	CS-LATAM
	United Arab Emirates	CS-UAE
Belkin Non-Networking	Global	Belkin Support

Guidelines:
- Junior Coordinator to qualify if the case is subject for any Customer Service related escalations o RMA
  - o Refunds
  - o Model Exchange
  - o Product Registration
- Junior Coordinators to identify which Support Group to escalate the case to
  - Support Groups and Queue o Customer Service
    - · All Networking cases (Linksys, Wemo, Belkin Net)
    - · Set Case Status to **NEW**
      - NA - Customer Service – NA
      - Intl – Per Region
        - o CS-EMEA/CS-LATAM/CS-ANZ/CS-APAC (whichever region applies)
      - Set Case Status to NEW
  - o Belkin Non-net – Belkin Support
    - · Set Case Status to **ESCALATED**
    - · All Belkin non-net cases, regardless of the region, will be assigned to Belkin Support if customer communicates in English
    - · If customers from non-English regions needs to be escalated to CS, SMRT JC must set customer's expectation that the CS representative can only assist him in English

STANDARD APPROACH

Note: It is expected that when a Junior Coordinator creates a case for CS escalation, he/she already has edited the
*Customer's **Account** information with the following details:*
- *Name (first name, last name)*
- *Phone number*
- *Email Address*
- *Theater (based on customer's location/state/country)*

<u>Create a Case</u>
- Junior Coordinator will open Customer's Account by clicking **Account Name**
- Click Create Case, set the Case Record Type to **Social Media**, hit **Continue**
- Associate the case to the customer's Contact Name (handle/username/vanity name)
- Enter Subject following the format **Channel: Handle (SKU)**
  e.g. Twitter: @customer (WRT3200ACM)
- IR Number (if applicable)
- Social Media Memo = Escalated-CS
- Language = English
- Customer Service Brand
- Case Type = Social Media

- Case Origin
    - o If Email Case is solicited, Case Origin should be the Channel where the email was solicited from (e.g. Reviews-Linksys, Community-Linksys)
- Tick the **Escalation** box under Escalation Details
- Select Escalation Reason
- Select Escalation Priority
- Hit **Save**
- Set TS Problem/Solution
- Create Asset

Create a Call Log

- Go to Feed > Call Log

    - o State the purpose of the escalation (e.g. Replacement, Refund, Order Placement, etc.) o Brief description of the problem

    o State if receipt/DOP was provided (for applicable cases) o State if there are file attachments (photo, etc.)

    - o Other important notes and specific customer requests (e.g. Approver, customer prefers email support only)
- Set Status
- Set Case Owner

Email Format for Escalation Notification (for applicable cases only)

To: SMRT Leads distro

CC: SMRT Team distro

Subject Format: <Source>:<Social Handle><(Escalation Case Number)>

e.g. Twitter: Abraham Linksys (012345)

Body: <contains the details of the case>

- Screenshot of customer's post
- Link to post
- Product info: Make and Model of device; firmware/driver version
- Brief storyline on what happened

The Junior coordinator gathers relevant information to substantiate the case created on Salesforce

- *Checks SalesForce for any existing customer account before creating an account/a case*
- *If customer has an existing case regardless of Case Origin (Social or other LOBs), determine if it falls under **CS Escalation – Networking** or **CS Escalation – Non-Networking***

CS Escalation - Networking

- For Linksys Networking products, JC will ask for the serial number and check entitlement status via SN Lookup tool, or ask for DOP
    - Inform the customer of the entitlement status
    - For devices out of Complimentary Assisted Support, JC to set the customer's expectation that CS will discuss with him his options
    - For VIP customers, ask for Leads' approval

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- For Belkin and Wemo products, ask for DOP (no need to ask for serial number since there is no SN Lookup tool for this brands)

Scenario	Action (Create vs Edit)	Tagging on SFDC			Additional Instruction
		Case Status	Case Type	Case Owner	
Social needs to escalate a case to CS (fresh issue)	Create	New	Social Media	Customer Service Group	NA
Customer reached out to Social to follow-up on a case currently RESOLVED under Customer Service; Resolved Case originated from Social (Case Origin = Social Media)	Edit	New	Social Media	Customer Service Group	Append a note to the Open case
Customer reached out to Social to follow-up on a case currently Open (Escalated/Pending/Updated) under Customer Service; Open Case originated from Social (Case Origin = Social Media)	Edit	New	Social Media	Customer Service Group	Append a note to the Open case
Customer reached out to Social to follow-up on case currently Open (Escalated/Pending/Updated) under Customer Service; Open Case did NOT originate from Social (ex. Case Origin = Phone/Chat)	Create	New	Social Media	Customer Service Group	NA
Customer reached out to Social to follow-up on a case currently RESOLVED under Customer Service; Resolved Case did NOT originate from Social (ex. Case Origin = Phone/Chat)	Create	New	Social Media	Customer Service Group	NA
Customer reached out to Social about a CS-related case RESOLVED under tech Support group (ex. Case is from Phone, L1, Chat)	Edit	New	Social Media	Customer Service Group	Append a note to the Open case

CS Escalation – Non-networking

- JC needs to ask for the receipt, except for Belkin NN's MixIT cables & overlays, and photo for hardware
defects

  o If cable is faulty but no physical damage, ask customer to cut cable in
half Approved Spiel:

  For us to proceed with the replacement, please send us a photo of your Belkin cable cut in half. Once we receive your confirmation photo, we will have a new product shipped out to you within 1-2 business days. Delivery times vary between 2-5 business days.

  You are not required to send us your old cable back to us. After sending the photo, please feel free to dispose of the cable how you see fit.

  If you have any further questions, please reach out to us. Your case number for your reference is

  o   Do not ask customers to cut cables that are obviously damaged

  o   Do not ask customers to cut cables that are to be sent to Irvine for investigation o Do not ask customers to cut cables identified by clients as exceptions

  o   Proceed with the escalation even if POP and photos were not provided

    ▪   Update the case once customer provides the POP and photos

  NOTE: Cables and power surge protectors less than $50 should be incapacitated by cutting the cable in two

Non-Net RMA Considerations:

- New RMA process is for NA only

    ▪   Own the RMA; do not ask customer to process STORE replacement regardless of DOP

- Social to follow through on RMA process for other Regions

    ▪   Advise customer to process STORE replacement if applicable

Scenario	Action	Tagging in SF			Additional Instruction
		Case Status	Case Type	Case Owner	
Social needs to escalate a case to CS (fresh issue)	Create	Escalate d	Social Media	Belkin Support	NA
Customer reported a CS concern for a different product	Create	Escalate d	Social Media	Belkin Support	NA
Customer reached out about a different product	Create	Escalate d	Social Media	Belkin Support	NA
Follow-up on any escalated case Not yet catered by Belkin Support	Edit	Present Value	Social Media	Present Value	Append a note the Open Case; do not change Case Status and Owner -leave it to their present value; Send email to Leads

Follow up on an Open case about the same/related issue	Edit	Escalated	Social Media	Present Value	Append a note the Open Case; set Status to Escalated; do not change Owner -leave it to their present value; Send email to Leads
Customer has a Resolved CS Case and contacted Social for the same/related issue	Edit	Escalated	Social Media	Belkin Support	Re-open the Resolved case by setting Status to Escalated; append a note; Queue it to Belkin Support; Send email to Leads
Received the Replacement/Refund but wanted to receive a different model					
Follow-up on RMA/Refund (not yet processed) RMA Activated by Tech					
Customer reached out about a different issue on same product					
Customer reached out to follow on an RMA case where product was not received					

Escalation Priority – determine the timeframe Support team will cater to the case
- P1 - 8 hours
- P2 – 24-48 hours (used for Tech escalation only)
- P3 – 24-48 hours

Brand	Queue Name	Priority	Case Type	Case Status
Linksys & Belkin Net & Wemo	Customer Service-NA	P1 - VIP	Social Media	New
		P3 - Non-VIP	Social Media	New
	CS-Intl (CS-EMEA/CS-LATAM/CS-ANZ/CS-APAC)	P1 - VIP	Social Media	New
		P3 - Non-VIP	Social Media	New
		P3 - Non-VIP	Social Media	New
Belkin Non-Net	Belkin Support (ALL English supported language)	P1 - VIP	Social Media	Escalated
		P3 - Non-VIP	Social Media	Escalated