# MOMENTUM SPORTS

**Customer Complaint & Escalation Records**

*System Documentation & User Guide*

*"Built for the Journey"*

# SYSTEM OVERVIEW

The Customer Complaint & Escalation Records system is a comprehensive database designed to track, manage, and analyze customer complaints across all channels and regions for Momentum Sports. This system supports our commitment to operational excellence and customer-centric innovation.

## KEY FEATURES

• Multi-channel tracking: B2C direct customers and B2B reseller partners

• Real-time metrics with automated formulas and calculations

• Escalation path documentation aligned with organizational structure

• Root cause analysis and trend identification

• Customer satisfaction tracking (CSAT) and follow-up management

• Regional and product category performance analytics

# DATABASE STRUCTURE

The system consists of five interconnected worksheets, each serving a specific purpose in the complaint management lifecycle.

## 1. Summary Dashboard

**Purpose:** Executive-level overview of complaint metrics and trends

Key Metrics:

• Total active complaints by severity level (Critical, High, Medium, Low)

• Complaints open over 30 days requiring attention

• Average resolution time across all resolved complaints

• Average CSAT score and response rate

• Escalation statistics (total, by level, open escalations)

• Complaints by channel (B2C, VAR, Warehouse, Specialty Shop)

• Complaints by product category (Bikes, Components, Clothing, Accessories)

All metrics use Excel formulas for automatic updates when data changes.

## 2. Active Complaints

**Purpose:** Track all currently open customer complaints requiring resolution

Data Fields:

• Complaint ID: Unique identifier (format: CMP-YYYY-####)

• Date Received: When complaint was logged

• Days Open: Auto-calculated using TODAY() function

• Customer Type: B2C or B2B channel classification

• Customer ID/Name: Reference to customer or reseller

• Region: Geographic market (Southwest US, Canada, Europe, etc.)

• Product Category & SKU: Product classification details

• Complaint Type: Nature of complaint (16 categories)

• Severity: Low, Medium, High, or Critical (color-coded)

• Status: Current complaint status

• Assigned To: Team member responsible

• Description Summary: Brief complaint details

• Customer Contact: Email for follow-up

• Expected Resolution: Target completion date

**Color Coding:** Critical severity = Red fill, High severity = Yellow fill

## 3. Resolved Complaints

**Purpose:** Historical record of completed complaints with resolution details

Data Fields:

• All fields from Active Complaints

• Date Resolved: Completion date

• Resolution Time (Days): Auto-calculated

• Resolution: Actions taken to resolve

• Root Cause: Identified cause for trend analysis

• CSAT Score: Customer satisfaction rating (1-5 scale)

• Follow-up Notes: Additional customer feedback

**Color Coding:** CSAT 4-5 = Green fill (satisfied), CSAT 1-2 = Red fill (requires follow-up)

## 4. Escalation History

**Purpose:** Track complaints escalated beyond standard resolution process

Escalation Levels:

• Level 2: COO (Jordan Lee) or Sales Director (Riley Chen)

• Level 3: General Manager (Alex Morgan)

Data Fields:

• Escalation Date: When escalated

• Escalated From/To: Team member escalation path

• Escalation Level: Level 2 or Level 3

• Reason for Escalation: Why standard process insufficient

• Current Status: In Progress or resolution status

• Resolution Date & Days to Resolve: Tracking metrics

• Outcome: Final resolution details

**Color Coding:** Level 3 = Red fill, Level 2 = Yellow fill

## 5. Root Cause Analysis

**Purpose:** Identify patterns, trends, and opportunities for process improvement

Analysis Sections:

• Top Complaint Types: Frequency and average resolution time

• Root Cause Breakdown: Underlying causes with prevention actions

• Regional Analysis: Complaints by geographic market

• Trend Metrics: Quarter-over-quarter performance comparison

# USAGE GUIDELINES

## Logging New Complaints

1. Navigate to 'Active Complaints' sheet

2. Add new row with all required fields

3. Use standard format for Complaint ID: CMP-YYYY-####

4. Days Open will calculate automatically

5. Assign severity level and responsible team member

6. Update Summary Dashboard automatically refreshes

## Resolving Complaints

1. Complete all resolution actions

2. Copy complaint row from Active to Resolved sheet

3. Add Date Resolved, Resolution, and Root Cause

4. Resolution Time calculates automatically

5. Send CSAT survey to customer

6. Log CSAT score when received (1-5 scale)

7. Delete complaint from Active Complaints sheet

## Escalating Complaints

1. Navigate to 'Escalation History' sheet

2. Log escalation with clear reason

3. Follow organizational escalation paths:

- Customer Service → COO (Jordan Lee)

- Channel Manager → Sales Director (Riley Chen)

- Any Level 2 → General Manager (Alex Morgan)

4. Update status as escalation progresses

5. Record resolution date and outcome when complete

# BEST PRACTICES

## Data Quality

• Update records daily to maintain accuracy

• Use consistent terminology across all fields

• Complete all required fields for every complaint

• Verify customer IDs match Company Database

## Performance Monitoring

• Review Summary Dashboard weekly with operations team

• Address complaints open >30 days immediately

• Target: Average resolution time <7 days

• Target: CSAT score >4.0 across all channels

• Target: Escalation rate <10% of total complaints

## Continuous Improvement

• Review Root Cause Analysis monthly

• Implement prevention actions for recurring issues

• Share insights with Supply Chain, Product, and Sales teams

• Track improvement trends quarter-over-quarter

# TECHNICAL NOTES

• All formulas recalculate automatically when data changes

• Do not delete or rename column headers - formulas depend on them

• Date fields use mm/dd/yyyy format

• Color coding provides at-a-glance priority identification

• Regular backups recommended (weekly minimum)

# SYSTEM SUPPORT

For questions or technical support, contact:

• Operations Team: Jordan Lee (COO) - jordan.lee@company.com.au

• Customer Service: Avery Wilson - avery.wilson@company.com.au

• Technology: Charlie Nguyen (CTO) - charlie.nguyen@company.com.au

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