Recording Stakeholder Interaction Policy and Procedure

Overview

World Traveller staff will use this policy and procedure to manage and record all stakeholder interactions, including complaints.

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Purpose

The purpose of this policy and procedure is to provide guidelines that clearly communicate to World Traveller staff the requirements for managing and recording all stakeholder interactions, including complaints.

Scope

This stakeholder interaction policy and procedure applies to all employees involved in managing and recording all stakeholder interactions, including complaints.

Policy for recording stakeholder interactions

Customers are our business. World Traveller considers every customer a critical stakeholder. We also consider our business partners and suppliers key stakeholders to our continuing success. Our policy is to treat all stakeholders respectfully and ensure all transactions are transparent and conducted with integrity and without bias. This includes ensuring that all interactions are recorded accurately in the customer management system.

Customer interactions

Customer interactions include:

- Complaints
- Requesting information
- Placing an order
- Making a booking
- Providing feedback.

Responsibilities of customer service representatives

- Gather data from stakeholder interactions.
- Examine the purpose of stakeholder interaction.
- Examine the data gathered from stakeholder interactions.

- Determine the information to be included in the record by identifying organisational policies and procedures.
- Enter information about stakeholder interactions in the required Customer Management System (CMS) fields in accordance with organisational policies, procedures, and protocols.
- Check that the information gathered has been assigned to the appropriate CMS stakeholder.
- Confirm that records accurately represent stakeholder perspectives, are free of bias and opinion, and meet organisational requirements.
- Examine the record's completeness and discoverability.
- Completing the necessary processes for finalising and saving the created record in CMS in accordance with organisational policies and procedures, including the Privacy and Confidentiality Policy.

Procedure for recording stakeholder interactions

The key steps are shown in the following table.

Step	Description
Step 1: Prepare to record stakeholder interaction	1. Collect information from stakeholder interactions. • This may include in-person or via feedback forms, email, SMS, social media or telephone messages 2. Review the purpose of stakeholder interaction. • Is this a complaint? Request for information, etc.? 3. Review information collected from stakeholder interaction • Double-check the details, including spelling of names, date of birth and contact telephone or email addresses 4. Identify any other organisational policies and procedures and determine the information to be included in the record • For example, a refund policy and procedure or cancellation conditions
Step 2: Create a record of stakeholder interaction	Enter details of stakeholder interaction in required Customer Management System (CMS) fields according to World Traveller organisational policies, procedures and protocols. These will include the following data fields: **Data fields** Information that is relevant to stakeholder interaction purposes may include: • Name/s (of stakeholders) • Date/s • Purpose of the interaction • Details of interaction Depending on the purpose of the interaction, you may also include: • Desired outcomes • Timelines (dates)

	• Responsibilities (who will do what, when and how) • Costs (if appropriate) • Approvals (if required) • Follow-up and monitoring of the interaction • Closure and outcomes of the interaction • Sign-off Check that collected information has been attributed to appropriate stakeholders in CMS. • Double-check the details, including numerical codes such as booking numbers and the spelling of names, date of birth and contact telephone or email addresses • When clarifying customer details, use the phonetic alphabet • Use listening and questioning skills to gather information and confirm understanding • Paraphrase information back to the customer
Step 3: Finalise and review the recording process	1. Confirm that records represent stakeholder views, are free of bias and opinion, and comply with organisational requirements 2. Check completeness and discoverability of records: check all details and ensure that records are saved. 3. Complete required processes for finalising and saving created records in the CMS according to organisational policies and procedures

How do we check that records represent stakeholder views, are free of bias and opinion, and comply with organisational requirements

- Read the complaint carefully
- Use tools to allow you to gather required information, e.g., the CMS
- Refer to your organisational policies and procedures
- Collect and use data objectively
- Use reliable data sources such as complaint forms, feedback, surveys and focus groups
- Ask open and closed questions to gather information and confirm understanding

How to check records for completeness and discoverability

Completeness

- Check all required data fields contain data
- Check all entered data is accurate
- Check data against any collected information when you collect initial information from the stakeholder (e.g. feedback forms, complaint forms).

Discoverability

Ensure the 'searchable' fields are completed correctly. These may include:

- Name/s (of stakeholders)
- Date/s of activity
- Flight codes
- Event or travel experience code.

Documenting complaints

Documenting customer complaints forms an integral part of our customer interactions.

Definition of a complaint
In this policy, a complaint refers to a customer expressing discontent with a travel service we supply.

Recording complaints
All complaints (verbal and written) are escalated to the Customer Service Manager. The Customer Service Manager must contact the client within seven (7) days of receiving the complaint.
When we get a complaint, we will keep track of the customer's name and contact information. We'll also keep track of all the details of the complaint, including the facts and the cause(s) of the complaint, the outcome and any measures taken as a result of the investigation.

All dates and times relevant to the steps taken to resolve the complaint and our conversations will be recorded. Management will monitor complaints to identify trends as part of our continuous improvement plan, and rectification/remedial action will be taken to address any discovered concerns. If a customer files a complaint, we will keep track of personal information for the sole purpose of resolving the issue.

Unless a customer expressly approves disclosure, the customer's personal information will be actively protected. If the customer's travel services included a third-party travel supplier, such as a tour operator, it might be necessary to meet with them to examine the complaint thoroughly.