THE MODERN SUPPORT ✅ CHECKLIST

Evaluating Your QMS & Customer Support Needs

WHAT'S COSTING YOU TIME & MONEY?

Challenge	Operational Impact
☐ **Decentralized Data**: We rely on shared inboxes, spreadsheets, or paper forms to track customer issues and internal quality problems.	➡️ **Result**: Issues get lost; audit preparation takes days.
☐ **No Accountability**: We cannot easily determine who owns a specific issue or when it will be resolved.	➡️ **Result**: Agent frustration; critical issues stall or expire.
☐ **Blind Spot on Recurrence**: We cannot easily run reports to identify which defects or issues recur most frequently.	➡️ **Result**: High scrap rates and chronic product failures persist.
☐ **No Customer Transparency**: Customers must call or email us just to get a status update on their claim or issue.	➡️ **Result**: Clogged phone lines; poor customer experience.
☐ **Missed SLAs**: We frequently miss contractual Service Level Agreements because we lack automated tracking and alerting.	➡️ **Result**: Contractual penalties; loss of high-value B2B customers.
☐ **Manual CAPA**: Our Corrective and Preventive Action (CAPA) process requires manual handoffs and is difficult to track to completion.	➡️ **Result**: Failure to meet ISO 9001/quality standards.

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I. Centralization & Intake

	Priority	Requirement	Feature Explanation
☐	High	Unified Intake	Ability to log issues from email, web portals, and internal staff forms into a single, centralized database.
☐	High	Customizable Forms	Support forms can be easily tailored to capture required defect data (e.g., Lot Number, Failure Type) without coding.
☐	Med	Multi-Department Use	The system can be easily segmented for use by Customer Support, IT, Facilities, and Quality Control using the same license.

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WHAT ARE NON-NEGOTIABLE FEATURES OF YOUR NEW MANUFACTURING SUPPORT SOFTWARE?

II. Process & Accountability

	Priority	Requirement	Feature Explanation
☐	High	Automated Routing	Issues are instantly assigned to the correct team/agent based on type (e.g., "Warranty Claim" goes to Finance, "Product Defect" goes to Engineering).
☐	High	SLA Management	Built-in functionality to track, monitor, and alert managers when tickets are approaching breach of Service Level Agreements.
☐	High	Immutable Audit Trail	Every step of the issue lifecycle—from creation to resolution—is logged and timestamped for regulatory proof.

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III. Data & Prevention

	Priority	Requirement	Feature Explanation
☐	Critical	Trend Reporting	Ability to generate visual reports (e.g., Pareto charts) instantly to identify the most frequent recurring defects by category, product, or vendor.
☐	High	CAPA Workflow	Native support for a formal, repeatable workflow that manages the full Corrective and Preventive Action (CAPA) cycle.
☐	Med	KPI Dashboard	Real-time views of key performance indicators (KPIs) like resolution time, volume by product, and agent productivity.

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IV. Customer Experience

	Priority	Requirement	Feature Explanation
☐	**High**	**Self-Service Portal**	A secure, public-facing website where customers can submit issues and check the status of their claims without contacting an agent.
☐	**Med**	**Automated Notifications**	Automatically sends email updates to the customer upon ticket creation, assignment, and closure.

🚀 **Conclusion: Moving Beyond Legacy Processes**

If your current tools check fewer than three boxes on pages 2-5, your legacy processes are no longer sustainable.

Implementing a modern solution is the fastest way to:

1. **Reduce Scrap** & Rework by identifying and eliminating recurring defects.
2. **Protect Contracts** by guaranteeing SLA compliance.
3. **Future-Proof** your support operations for growth and scale.