

HIGH-VOLUME

WORKSHEET 3 OF 9

# Customer Complaint Quick Triage

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*Fill within 24 hours of receiving any complaint. One row per complaint. This is the intake form, not the full investigation.*



Complementary worksheet for  
*Quality Control Systems*  
by Ibrahim Anwar

## What This Is For

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Customer complaints arrive through WhatsApp, email, phone, and in person — each channel at a different moment, handled by a different staff member, with no guarantee the details end up in the same place. This triage sheet is the single intake point. Every complaint, regardless of channel, lands here within 24 hours. The sheet does not investigate; it collects the minimum information needed to start an investigation and tracks whether a response has been sent.

The operator who needs this sheet has complaints coming in but no consistent record of them. Six months from now, they will not know whether complaint volume is rising or flat, which customers complain most, or whether the same problem recurs from the same batch. This sheet builds that memory one row at a time without requiring software, a CRM, or a dedicated customer service team.

## Benefits

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What you get when you actually run this worksheet on a real situation:

- Creates a searchable register so that when a second complaint about the same batch arrives, the first is already on record and the link is immediate.
- Separates product defects from delivery damage from expectation mismatches — three different root causes that look the same if all complaints are treated as 'customer not happy.'
- The 24-hour acknowledgment column ensures no complaint is accidentally silenced: if the cell is empty and more than a day has passed, the next action is visible without reading the whole row.
- Provides the raw data for monthly complaint rate calculation: total rows divided by total transactions, giving a KQI that can be tracked against internal defect rate.
- The lot/batch reference column links this sheet to IQC and NCR records — the connection that makes complaint investigation tractable instead of guesswork.

# Framework To Use

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## — Intake-Before-Investigation

*Record first, investigate second — the 24-hour intake rule separates customer relationship management from root cause work so neither gets delayed by the other.*

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# How To Use

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Follow these steps in order. Each one builds on the previous.

- 1** Keep one physical sheet or one shared spreadsheet tab as the complaint register for the current month. Every new complaint gets its own row — never edited retroactively, only appended.
- 2** Fill Date Received, Customer, and Complaint Description within 24 hours of first contact. Complaint Description must be specific: 'packaging dented on arrival, 3 of 12 units' beats 'quality problem.'
- 3** For Lot/Batch Reference: ask the customer for any code, date, or label number on the packaging. If they cannot provide one, write 'customer unable to provide' — that is itself a data point about your traceability system.
- 4** Categorize: Product (defect in the item itself), Delivery (damage or delay in transit), or Expectation (product is as shipped but does not match what the customer expected). The category determines who is assigned and what investigation runs.
- 5** Set a Resolution Target Date based on category: Product complaints need investigation before committing to resolution — target 5 business days. Delivery claims can often be resolved faster. Expectation complaints need a sales conversation, not a QC investigation.
- 6** Check the Acknowledgment column every morning. Any row where acknowledgment has not been sent and more than 24 hours have elapsed: send the acknowledgment now, before any other action.
- 7** At month end, count rows by Category. If Product rows exceed 30% of total transactions, cross-reference with the month's NCR records to identify shared batches.

## Example Use

*A wholesale distributor of packaged food products handles roughly 120 customer transactions per month. The owner has been managing complaints verbally. This month three complaints arrive in the same week.*

Monday: a minimarket chain buyer calls — two cases from last Friday's delivery have leaking sachets. Triage row entered: Date 5/5, Customer "Minimart Cahaya," Description "leaking sachets, 2 cases from delivery 5/2," Lot Ref "LOT-2025-0428," Category "Product," Assigned to QC lead, Resolution target 5/9. Acknowledgment sent Monday afternoon.

Wednesday: a second buyer emails about packaging that was dented on arrival — clearly shipping damage, not a product defect. Triage row entered. Category "Delivery." Assigned to logistics coordinator. Resolution target 5/7 (faster — replacement can ship without investigation). Acknowledgment sent same day.

Thursday: a long-term buyer says the new flavor variant "tastes different." No batch reference available. Category "Expectation." Assigned to sales lead to discuss whether flavor profile communication needs updating.

Week end: three rows, three categories, three different actions, zero overlap. The owner checks the Acknowledgment column — all three rows show acknowledgment sent. The QC lead pulls NCR records for LOT-2025-0428: two NCR entries from that lot's final inspection, both for "minor seal irregularity — passed with note." The complaint confirms what should have been a hold decision on that lot. A CAPA is opened for final inspection disposition criteria.

Month total: 4 Product complaints out of 120 transactions = 3.3% complaint rate. The owner now has a number, not a feeling.

# The Worksheet

*Tear this out, copy it onto a fresh sheet, or fill it in directly.*

## Customer Complaint Quick Triage

*Fill within 24 hours of receiving any complaint. One row per complaint. This is the intake form, not the full investigation.*

DATE RECEIVED	CUSTOMER	COMPLAINT DESCRIPTION (SPECIFIC)	LOT / BATCH REFERENCE	CATEGORY (PRODUCT / DELIVERY / EXPECTATION)	ASSIGNED TO	RESOLUTION TARGET DATE

## Reflection Prompts

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*After filling in the worksheet on the previous page, work through these.*

1. At week end, count rows by Category. If Product defects dominate, cross-reference with NCR records from the same lot. If Delivery damage dominates, the packaging or logistics process is the issue — not production.
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2. For each row: has the customer received an acknowledgment within 24 hours? If any row says no and more than 24 hours have passed, that is the only action needed right now. Investigation can wait. Silence cannot.
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# Tips and Traps

## TIPS

- Train every staff member who receives customer contact — phone, WhatsApp, email, in-person — to collect the four minimum fields before ending the interaction: date, specific problem description, product reference, and channel. The investigation cannot start without those four.
- Use the same triage sheet for all complaint channels. Complaints handled 'in WhatsApp' that never land on the triage sheet do not exist as data. They are invisible defect signals that repeat.
- At the end of each month, copy the triage sheet's row count and category breakdown into a one-row summary on a running monthly tracker. That running tracker is the complaint rate KQI.
- If the same customer appears in three or more rows within one month, that is a relationship signal, not just a quality signal. It requires both a QC investigation and a personal contact from the owner or account manager.

## TRAPS

- Writing 'quality issue' or 'customer unhappy' in the Description column. Every complaint feels like a quality issue to the customer. Specific description is the only thing that enables investigation: 'seal split on 3 of 24 units, sachets leak on pressure.'
- Filling the Resolution Target Date column and then not checking it. A target date that passes without resolution or update is worse than no target at all — the customer knows you set a deadline and missed it.
- Categorizing 'Expectation' complaints as noise and not assigning them. If a customer expected something different from what you shipped, that gap is either a communication failure or a product specification drift — both have correctable causes.
- Treating the triage sheet as the investigation. It is intake only. An NCR cross-reference, an IQC record pull, or a 5 Whys session are the investigation. The triage sheet just makes sure those actions have a starting point.

# Appendixes

## Appendix A – Category Definitions

**PRODUCT** : Defect is in the item itself – wrong spec, damaged before shipping, contamination, weight/dimension out of tolerance.  
Action: QC lead + NCR cross-reference + IQC/IPQC trace.

**DELIVERY** : Item was correct when it left; damage or delay occurred in transit.  
Action: logistics coordinator + carrier claim if applicable.  
Note: if packaging is consistently failing transit, packaging spec or pallet method is the process to investigate.

**EXPECTATION**: Item is as specified and shipped correctly; customer's expectation differs from what was delivered.  
Action: sales lead + review of product description and spec sheet.  
May indicate SKU description needs updating, not that QC failed.

When unsure: default to PRODUCT and let the investigation reclassify.

## Appendix B – Acknowledgment Templates

Same-day acknowledgment (all categories):

"Thank you for letting us know. We have logged your complaint and assigned it for investigation. We will update you by [date]."

When investigation will take longer than 5 days:

"We are investigating the issue with lot [reference]. Our target is to provide a full response by [date]. If you need an interim replacement before that date, please let us know."

Do not promise a root cause in the acknowledgment.

Promise a date. Deliver the date.



CONFIRMATION

WHERE THIS WORKSHEET COMES FROM

## Quality Control Systems

*Consistent Quality Is the Result of a System, Not Inspection*

by Ibrahim Anwar

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This worksheet is one of nine in the *Quality Control Systems* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

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