

# Multi-Channel Customer Support Hub (Omnichannel Support Project)

This project is a Salesforce-based Omnichannel Support System that centralizes customer queries from Email, WhatsApp, Chat, and Social Media into a single platform. It enables automated case creation and assignment, SLA management, sentiment-based prioritization, and real-time dashboards for agents and managers.

The system helps support agents respond faster, managers monitor performance, and customers receive consistent and timely responses, improving overall customer satisfaction and retention.

## *Phase 1: Problem Understanding & Industry Analysis*

### 1. Requirement Gathering

- **Objective:** Enable companies to manage customer queries from multiple channels (Email, WhatsApp, Chat, Social Media) in one Salesforce platform.
- **Gathered Requirements:**
  - **Unified Inbox** → Central place where all customer queries arrive.
  - **Case Management** → Auto-create and assign Cases from incoming queries.
  - **Omnichannel Routing** → Distribute cases to available agents based on skills, priority, or workload.
  - **SLAs & Escalations** → Ensure timely resolution with automated reminders.
  - **Sentiment Analysis** → Flag negative/urgent cases automatically.
  - **Reports & Dashboards** → Track resolution times, agent productivity, and channel effectiveness.

### 2. Stakeholder Analysis

- **Primary Stakeholders:**
  - **Support Agents** → Need an easy-to-use interface to respond to queries from multiple channels.
  - **Customers** → Expect quick and consistent responses, regardless of channel.
  - **Support Managers** → Need visibility into KPIs (first response time, resolution time, customer satisfaction).
  - **IT/Admin Team** → Responsible for Salesforce setup, integration with channels (WhatsApp, Chatbot, Social), and security.

### 3. Business Process Mapping

- **Current Process (Without Salesforce):**
  - Customers reach out via Email, WhatsApp, or Social Media.
  - Agents handle them separately → responses delayed, duplicate handling possible.
  - Escalations missed due to lack of tracking.
  - Managers cannot measure customer satisfaction properly.
- **Proposed Salesforce Process:**
  - All incoming queries **auto-converted into Cases** in Salesforce.
  - **Omnichannel Routing** assigns Cases based on priority and availability.
  - Agents reply from Salesforce → response is sent back via the original channel (Email, WhatsApp, Chat).
  - **SLAs** applied → if not resolved in time, the case escalates.
  - **LWC Unified Inbox** for agents → one screen to view/respond across channels.
  - **Dashboards** → show total cases, resolution time, customer sentiment breakdown.

#### 4. Industry-Specific Use Case Analysis (Customer Support)

- **Omnichannel Support** is critical for BPOs, Call Centers, D2C Brands, and E-commerce firms.
- **Customer Retention** depends heavily on fast & personalized responses.
- **Multi-channel engagement** reduces the risk of customers being ignored.
- **Sentiment-driven escalation** improves customer satisfaction scores (CSAT).

*Example:*

Without Salesforce → A customer sends a WhatsApp query and waits 2 days for a response.

With Salesforce → Case auto-created, routed to available agent, and SLA ensures a **1-hour response time**.

#### 5. AppExchange Exploration

- **Useful Salesforce Apps for Multi-Channel Support:**
  - **Digital Engagement Add-on** → Natively supports WhatsApp, Facebook Messenger, SMS, and Web Chat.
  - **Einstein Bots** → Automates FAQs and routes complex queries to human agents.
  - **Twilio/SMS Magic** → For WhatsApp & SMS integration.
  - **Vonage/Genesys Cloud** → Voice channel integration.
  - **SurveyMonkey or Salesforce Surveys** → Collect post-resolution feedback.