

Project Document – Phase 1

Project Title: Customer Support Automation for Banking using Salesforce Service Cloud

Requirement Gathering:

The banking industry deals with millions of customer interactions every month, ranging from simple service requests to critical complaints. Common issues include loan application status checks, credit card blocking, transaction disputes, and online banking login problems. At present, many banks rely on legacy systems and manual logging of requests, which leads to delays and inconsistent customer experiences.

The goal is to create a system that:

1. Captures customer requests from multiple channels (phone, email, chat).
2. Automatically creates and categorizes cases inside Salesforce.
3. Routes cases to the right department or agent without delays.
4. Provides a self-service option for routine tasks like card blocking or password resets.
5. Helps managers monitor service quality and agent productivity through dashboards.

By understanding these requirements, the solution aims to bridge the gap between customer expectations and actual service delivery.

Stakeholder Analysis:

1. End Customers (Banking Clients):

- Need: Quick resolution of issues like loan updates, card blocking, and password resets.
- Pain Points: Long wait times, repeated calls, lack of visibility into request status.
- Expectation: 24/7 support with transparency and self-service options.

2. Customer Service Agents:

- Need: A central platform to view, manage, and resolve customer cases.
- Pain Points: Manually entering data, difficulty in prioritizing cases, no single view of customer history.
- Expectation: Easy-to-use console, access to knowledge base, and automated workflows.

3. **Bank Managers / Administrators:**

- Need: Insights into performance metrics such as SLA compliance, average handling time, and customer satisfaction scores.
- Pain Points: Lack of consolidated reports, difficulty in monitoring agent workload.
- Expectation: Real-time dashboards, escalations for unresolved issues, and better forecasting of support needs.

Business Process Mapping:

Current (Manual) Banking Process:

- A customer calls or emails the bank.
- An agent or back-office staff logs the request manually.
- Cases are assigned randomly or by manual decision.
- Customers often wait hours or days for updates.
- Escalations happen late, leading to dissatisfaction.

Future Process with Salesforce:

- Customer contacts bank via chat, phone, or email.
- Salesforce **automatically creates a Case** in the system.
- **Omnichannel routing** ensures the case is sent to the right agent or queue (Loan, Card, Tech).
- **Einstein Bot** handles simple issues instantly (like card blocking).
- Agents work inside the **Service Console** for efficient resolution.

- Managers track performance via dashboards and reports in real time.

This transformation reduces manual intervention, increases first-contact resolution rates, and boosts customer satisfaction.

Industry-specific Use Case Analysis:

1. Lost Card / Card Block:

- High-priority case → needs immediate handling.
- Solution: Einstein Bot guides customer to block the card instantly; if complex, routes to Card Support Queue.

2. Loan Application Status:

- Frequently asked by customers applying for personal or home loans.
- Solution: Salesforce automatically pulls loan status from CRM or provides status through chatbot/self-service portal.

3. Password Reset Issues:

- Common login-related problem.
- Solution: Knowledge base article guides customer to reset password without agent involvement.

4. Transaction Disputes:

- Sensitive and requires escalation to managers.
- Solution: Case is flagged as “High Priority” and auto-escalated if unresolved in SLA timeframe.

These use cases ensure the system covers urgent, frequent, and sensitive requests.

AppExchange Exploration:

Salesforce AppExchange provides prebuilt apps and components to enhance functionality:

- **Service Cloud Essentials:** Core tool for case management.
- **Einstein Bots:** Provides conversational AI for common banking queries.

- **Omnichannel Routing:** Assigns customer queries to the right agent based on skills, availability, and priority.
- **Telephony Integration Apps (CTI):** Allow banks to integrate call systems directly into Salesforce.
- **Survey Apps:** Capture customer feedback after case closure.

Exploring AppExchange ensures the solution is scalable and future-ready.