

Customer Support Ticketing System

PHASE 1: PROBLEM UNDERSTANDING & INDUSTRY ANALYSIS

Problem Statement:

Businesses need a single platform where all customer issues can be logged, tracked, and monitored in real time. This avoids scattered communication through emails, calls, or chats.

Manual ticket distribution is time-consuming and often unfair. An automated system ensures tickets are assigned to the right agent based on priority and availability.

Managers require visibility into ticket progress, resolution time, and agent performance. Without analytics, it's difficult to measure efficiency or identify bottlenecks.

1. REQUIREMENT GATHERING

Goal: Understand business needs and pain points.

Collected inputs from small business owners, support agents, managers, and customers.

- Track all customer support tickets with status (New, In Progress, Escalated, Closed).
- Enable automatic ticket assignment to available agents based on priority.
- Prevent duplicate or overlapping assignments.
- Generate reports and dashboards.

2. STAKEHOLDER ANALYSIS

Goal: Identify users and beneficiaries of the system.

Internal Users:

- Support Agents: Resolve customer issues, update ticket status, escalate when needed.
- Managers: Monitors performance, approves escalations, analyses reports.
- IT/Admin Team: Handles system setup, integration, and maintenance.

External Users:

- Customers: Raise tickets, track status, provide feedback after resolution.

3. BUSINESS PROCESS MAPPING

Goal: Map current processes and define where automation can help.

Current Challenges:

- Manual logging and tracking of support tickets.
- No unified escalation or SLA management.
- Customer communication scattered across multiple channels.
- Limited visibility into resolution progress.

Proposed Improvements:

- Centralized ticket lifecycle management.
- Automated ticket assignment and prioritization.
- SLA tracking and escalation rules.
- Integrated customer communication (email, SMS, chat).

4. INDUSTRY USE CASE ANALYSIS

Goal: Tailor the solution to industry support needs.

Customer support is essential for business trust and retention.

Small businesses often lose track of issues in emails/WhatsApp, causing delays.

Critical industry requirements include:

- Centralized ticket tracking system.
- Automated assignment & escalation.
- Notifications for customer updates.

- Dashboards to measure KPIs (open vs closed cases, SLA compliance, resolution time).

5. APPEXCHANGE EXPLORATION

Goal: Find ready-to-use Salesforce apps that add value.

- Explore existing Salesforce apps for customer support and ticket management (e.g., Service Cloud, Support Ticketing Apps).
- Identify features such as centralized case logging, automated ticket assignment, SLA tracking, and analytics dashboards that can be included or improved in your custom solution.