Customer Support Helpdesk Project

Problem Statement – Customer Support Helpdesk

Overview

The client organization is experiencing growing difficulties in managing customer complaints and service requests due to outdated, manual methods. Processes are largely dependent on emails, phone calls, and spreadsheets, which often result in inefficiencies, poor tracking, and inconsistent communication.

Key Challenges

1. **Operational Inefficiency** – Without an automated system, case assignment and resolution are slow and error-prone. Support agents lack visibility into pending tasks, leading to delays and unresolved issues.

2. **Customer Dissatisfaction** – Customers frequently face delays in responses and have no simple mechanism to monitor the progress of their cases. This inconsistency erodes trust and overall satisfaction.

3. **Limited Managerial Insights** – Management is unable to monitor real-time service performance, resolution timelines, or escalation patterns due to the absence of dashboards and structured reporting.

4. **Escalation Risks** – Cases breaching SLA timelines often go unnoticed until escalated externally, which damages brand reputation and increases churn risk.

Proposed Solution

To address these issues, the project will implement a **Salesforce-based Customer Support Helpdesk**. The solution will centralize complaint management, automate case routing, and provide SLA-driven escalations. Customers will benefit from timely updates, while managers will gain actionable insights through performance dashboards and analytics. By streamlining service workflows, the platform will enhance operational efficiency, strengthen customer trust, and support better decision-making across the organization.

Phase 1: Problem Understanding & Industry Analysis

- **Requirement Gathering**

  - Collect business needs: tracking customer issues, assigning agents, ensuring timely resolution, and monitoring service quality.

  - Identify must-have features:
    - case logging

    - automated case assignment

    - escalation rules

    - SLA tracking, and reporting.

- **Stakeholder Analysis**

  - **Customers** → Raise complaints, receive timely updates.

  - **Support Agents** → Get case assignments, track and resolve efficiently.

  - **Managers** → Monitor performance, escalations, and resolution times.

  - **Admin** → Ensure system security, stability, and integrations.

- **Business Process Mapping**

  - **Process Flow:**
    Customer logs case → Auto-assigned to agent → Agent resolves or escalates → Customer notified → Case closed with feedback → Manager reviews via dashboard.

- **Industry-Specific Use Case Analysis**

  - In customer service, complaints vary by industry but share common needs: timely response, clear tracking, and proper escalation.
  - So, we need to log cases centrally, auto-assign them to agents, escalate overdue cases, and notify customers at each stage.

- ◆ **AppExchange Exploration**

    Relevant Apps to Explore:

    - ● **Case Management Tools** → Enhance service workflows.

    - ● **SLA & Escalation Apps** → Monitor deadlines and escalations.

    - ● **Survey/Feedback Apps** → Collect customer satisfaction ratings.

    - ● **Integration Tools** → Connect email, chatbots, or CTI with Salesforce.

Phase 2: Org Setup & Configuration

- ◆ **Salesforce Editions**

The project is implemented on a **Developer Edition (Enterprise features)**. This edition provides access to Service Cloud capabilities such as **Case Management, Assignment Rules, Escalation Rules, Knowledge Base, Reports, and Dashboards**. It is sufficient for simulating a real-world support environment.

- ◆ **Company Profile Setup**

    - ● **Company Information:** Configured with organization name, primary contact, corporate currency (INR/USD), and default time zone.

    - ● **Language Settings:** English (default) enabled, with the option for localization.

    - ● Ensures accurate **data alignment across reports and dashboards**.

- ◆ **Business Hours & Holidays**

    - ● **Business Hours:** Defined as Monday–Friday, 9:00 AM to 6:00 PM.

    - ● **Holidays:** Public/national holidays configured to ensure SLA timers pause during non-working days.

- This setup ensures **accurate SLA tracking for case escalations**.

◆ Fiscal Year Settings

- **Standard Fiscal Year** is used.

- Start month aligned with the client's financial year (April–March).

- Avoids complexity of custom fiscal years, which are not needed for this project.

◆ User Setup & Licenses

- **Admin User:** System Administrator with Service Cloud license.

- **Support Agents:** Assigned Salesforce Platform/Service Cloud licenses for case handling.

- **Managers:** Service Cloud licenses with reporting and dashboard access.

- Simulated multiple user accounts to **test role hierarchy and permissions**.

◆ Profiles

- **System Administrator:** Full CRUD rights on all objects.

- **Support Agent Profile:** Restricted to Case, Contact, and Knowledge objects; no setup access.

- **Manager Profile:** Case supervision, reporting, and dashboard access.

- Profiles ensure **baseline access control per role**.

◆ Roles

- **Role Hierarchy:**
  - Admin (top level)
  - Manager (can view all agent cases under them)
  - Agent (can only view and update their own assigned cases)

- Enables **data visibility aligned with business reporting structure**.

◆ Permission Sets

- **Knowledge Access:** Grants agents access to Salesforce Knowledge base.

- **Feedback Access:** Grants selected users access to custom Feedback object.

- Used for **granular access without modifying profiles**.

◆ OWD (Organization-Wide Defaults)

- **Cases:** Private → only owner and above role hierarchy can see.

- **Contacts:** Controlled by parent (linked to Accounts/Cases).

- **Other Standard Objects:** Public Read-Only where collaboration is needed.

- Enforces **data security and confidentiality of customer cases**.

◆ Sharing Rules

- **Manager Visibility:** Cases auto-shared with managers for supervision.

- **Public Groups:** Optional rules for sharing cases by region or category.

- Balances **data security with operational efficiency**.

◆ Login Access Policies

- Enabled **Admins to log in as any user** for troubleshooting.

- Configured **password policies**: minimum length, complexity, expiry, and lockout on failed attempts.

- Strengthens **data protection and compliance**.

◆ Dev Org Setup

- A **Developer Org** is used for development and initial testing.

- Contains **sample data, multiple test users (agents, managers, customers)**, and configured profiles/roles.

- Acts as the primary workspace for **build and unit testing**.

◆ Sandbox Usage

- In enterprise projects, **Sandboxes** are used for development, testing, and UAT.

- For this project, the **Developer Org simulates both Dev and Test environments**, due to scope and resource constraints.

◆ Deployment Basics

- Code and metadata are deployed using **Salesforce CLI (sf)** and VS Code.

- Deployment follows a **GitHub workflow**:

    1. Retrieve changes from Org → VS Code.

    2. Commit changes → GitHub.

    3. Deploy updated code → Org.