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client organization is experiencing growing difficulties in managing customer complaints and service requests due to outdated, manual methods.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

1. **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.

2. **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.

3. **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.

4. **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.

5. AppExchange Exploration

- Many “Customer Support” apps exist, offering case tracking, SLA monitoring, and chat integration. But we’ll build a simpler custom solution on Salesforce to learn the core concepts.