

# University Helpdesk CRM with Agentforce

## Phase 1: Problem Understanding & Industry Analysis

- **Project Title:** University Helpdesk CRM with Agentforce
- **Industry:** Higher Education
- **Target Users:** Students, Helpdesk Staff, Department Staff (IT, Finance, Exams, Hostel), University Admins

### 1. Problem Statement

Universities handle thousands of student queries daily in areas like fees, exams, hostel, registration, and IT support.

In the current system:

- Responses are delayed due to manual email/phone handling.
- Staff spend time on repetitive FAQs (e.g., fee due dates, exam schedules).
- No centralized ticket system exists, leading to duplicate or missed issues.
- Support is limited to office hours.

Goal:

To implement a Salesforce-native Helpdesk CRM (built entirely on Developer Org features) that:

- Provides 24/7 AI-powered FAQ responses using Agentforce.
- Creates Cases automatically when the chatbot cannot resolve a query.
- Routes Cases to the correct department using Case Assignment Rules and Queues.
- Enables staff to resolve Cases efficiently via Service Console and Knowledge.
- Collects student feedback after Case closure.

### 2. Requirement Gathering

- **Students:** Get instant answers to FAQs, raise support tickets (Cases), and track resolution progress.
- **Helpdesk Staff:** Reduce repetitive workload through chatbot deflection and resolve Cases faster with Knowledge, Quick Text, and Macros.
- **Departments (IT, Finance, Exams, Hostel):** Receive Cases relevant to their area via Queues and monitor workload distribution.
- **University Administration:** Access dashboards for case volume, resolution times, and satisfaction trends.

### 3. Stakeholder Analysis

- **Primary Users:** Students (via Experience Cloud + Chatbot)
- **Secondary Users:** Helpdesk Agents, Department Staff (IT/Finance/Exams/Hostel)

- **Decision Makers:** University Administration / IT Heads

## 4. Business Process Mapping

### Current Process:

1. Student emails/calls the helpdesk.
2. Staff manually note the issue and forward it to the department.
3. No proper tracking, leading to delays.

### Proposed Salesforce Process:

1. Student interacts with the Agentforce chatbot on Experience Cloud.
2. Chatbot resolves FAQ via Knowledge Articles.
3. If unresolved → Chatbot triggers a Flow → Creates a Case.
4. Case Assignment Rules → Route to the correct department Queue.
5. Agent resolves the Case in the Service Console with Knowledge support.
6. Post-closure → A feedback survey Flow stores a rating in a Feedback object.

## 5. Industry-Specific Use Case Analysis

- The Higher Education sector increasingly uses CRMs to improve student support.
- Best practices include:
  - AI chatbots for FAQs (exam dates, fee deadlines).
  - Case management for unresolved issues.
  - Dashboards for management insights.
- Using a Developer Org setup ensures scalability within free Salesforce limits.

## 6. AppExchange Exploration

- **Survey Force (Free)** – for capturing student feedback.
- **Agentforce Starter Templates** – to accelerate chatbot setup.
- **Standard Knowledge & Case Management** – for FAQs and ticket tracking.