**Business Case — Safaricom Digital Customer Service Portal**

**1. Executive Summary**

The Safaricom Digital Customer Service Portal project aims to revolutionize customer support by delivering a unified, multi-channel platform that enhances customer experience, reduces operational costs, and improves service efficiency. By integrating self-service options, AI chatbots, live support, and ticket management, the portal will enable 24/7 access to customer support, leading to higher satisfaction and reduced call center dependency.

**2. Business Need / Problem Statement**

Currently, Safaricom’s customer support channels are fragmented, leading to long wait times, inconsistent service quality, and increased operational costs. Customers increasingly demand digital and self-service options to resolve queries quickly without relying solely on call centers. There is a pressing need for a centralized digital portal that provides seamless, accessible, and efficient customer service.

**3. Project Objectives**

* Enhance customer satisfaction scores by at least 30% within 12 months of launch.
* Reduce call center call volume by 25% through effective digital self-service and chatbot functionalities.
* Achieve 24/7 availability of customer support through digital channels.
* Ensure compliance with data protection and accessibility regulations.
* Provide real-time analytics for continuous service improvement.

**4. Expected Benefits**

| **Benefit Category** | **Description** | **Measurement / KPI** |
| --- | --- | --- |
| **Customer Experience** | Faster issue resolution and convenience through self-service and live chat | Customer Satisfaction Score (CSAT), Net Promoter Score (NPS) |
| **Operational Efficiency** | Reduction in live call volumes and associated costs | Call volume reduction %; Cost savings |
| **Business Insights** | Access to real-time service metrics for proactive management | Dashboard availability, Reporting accuracy |
| **Compliance** | Adherence to CBK, GDPR, and local data privacy laws | Compliance audit results |

**5. Project Scope**

**In-Scope:**

* Development of web and mobile portal interfaces
* Integration with existing CRM systems (e.g., Salesforce)
* AI chatbot implementation with escalation to live agents
* Ticketing system and escalation workflows
* Reporting and analytics dashboards
* Multi-channel support (web, mobile, SMS, WhatsApp)
* Accessibility and data privacy compliance

**Out-of-Scope:**

* Major overhaul of existing CRM backend systems
* Customer billing and payment processing changes
* Physical call center infrastructure upgrades

**6. Cost Estimates**

| **Cost Component** | **Estimated Cost (KES)** | **Notes** |
| --- | --- | --- |
| Software Development | 15,000,000 | Portal and chatbot features |
| Vendor Licensing (Chatbot, CRM) | 5,000,000 | Annual license fees |
| Infrastructure (Cloud, Hosting) | 6,000,000 | Scalable cloud resources |
| Training and Change Management | 3,000,000 | Staff and customer training |
| Security and Compliance Audits | 2,000,000 | External audits and certifications |
| Contingency (10%) | 3,100,000 | Risk buffer |
| **Total** | **34,100,000** |  |

**7. Funding Sources**

Funding will come from Safaricom’s IT budget allocated for digital transformation initiatives.

**8. Risks and Mitigations**

| **Risk** | **Likelihood** | **Impact** | **Mitigation Strategy** |
| --- | --- | --- | --- |
| Integration challenges with CRM | Medium | High | Early engagement with CRM vendor, prototyping |
| Data privacy non-compliance | Low | High | Legal reviews, data encryption, audits |
| User adoption slower than expected | Medium | Medium | Training programs, communication campaigns |
| Vendor performance issues | Low | Medium | SLA agreements, regular vendor reviews |

**9. Timeline**

| **Phase** | **Duration (Weeks)** | **Key Deliverables** |
| --- | --- | --- |
| Initiation & Planning | 4 | Project charter, business case |
| Requirements Gathering | 3 | Requirements specification |
| Design & Development | 12 | Portal and chatbot development |
| Testing & UAT | 4 | Test plans, defect resolution |
| Pilot & Deployment | 4 | Pilot launch, feedback, rollout |

**10. Success Criteria**

* Project delivered on time and within budget.
* System uptime ≥ 99.9% post-launch.
* Achievement of at least 30% increase in customer satisfaction.
* At least 25% reduction in call center volumes within 6 months.
* Full compliance with regulatory standards.

**11. Approval**

| **Name** | **Title** | **Signature** | **Date** |
| --- | --- | --- | --- |
| [Sponsor] | CIO |  |  |
| [Project Manager] | IT Project Manager |  |  |