Phase 1: Problem Understanding & Industry Analysis

Project Title: Customer Support Ticketing System

Industry: Customer Service / IT Helpdesk / CRM Solutions

1. Problem Statement

Many organizations still rely on fragmented methods like emails, spreadsheets, or disconnected tools to manage customer support. This leads to delayed responses, lack of visibility for managers, and poor customer experience. Without a centralized system, it becomes difficult to enforce SLAs, track agent performance, and analyze customer issues effectively.

2. Objectives of the Salesforce Solution

- Centralize all customer support requests (tickets) in Salesforce.
- Automate ticket assignment, prioritization, and escalation.
- Provide real-time dashboards and SLA monitoring for managers.
- Enable agents to resolve issues faster with structured workflows.
- Improve customer satisfaction with transparent communication and faster resolution.

3. Stakeholder Analysis

Stakeholder	Role	Responsibilities	Influence
Customer	End User	Raise tickets, receive timely updates and resolutions	High
Support Agent	Operational User	Work on assigned tickets, update status, communicate with customers	High
Support Manager	Supervisor	Monitor workload, ensure SLA compliance, escalate issues	High
System Administrator	Technical Owner	Configure Salesforce org, manage users, ensure system stability	Medium
Executive/Business	Decision Maker	Review reports,	High

Owner	track KPIs, improve customer experience strategy

4. Core Business Process Mapping

The primary workflow of the Customer Support Ticketing System is as follows:
1. Ticket Creation – A customer raises a ticket via portal/email/chat.
2. Ticket Assignment – The system auto-assigns or queues the ticket for an agent.
3. Ticket Resolution – The agent works on the ticket, adds notes, and communicates with the customer.
4. Ticket Closure – Ticket is marked as Closed after successful resolution.
5. Monitoring & Reporting – Managers review performance and SLA compliance through dashboards.

5. Industry-Specific Use Case Analysis

- IT Helpdesk: Employees raise IT-related issues which are resolved by internal IT staff.
- E-Commerce: Customers raise order-related issues like returns, refunds, delivery delays.
- Healthcare: Patients raise queries regarding appointments, insurance, or reports.

6. AppExchange Exploration

Several AppExchange apps were explored to enhance support capabilities:
- Service Cloud by Salesforce: Enterprise-grade customer support with advanced features.
- Case Merge Premium: Merge duplicate tickets for efficiency.
- Email-to-Case Premium: Automates creation of tickets from customer emails.

Recommendation: A custom Salesforce solution will be built for flexibility and learning purposes, while drawing inspiration from these packages.

7. Constraints, Assumptions & Risks

- Constraints: Limited storage and API calls in Developer Edition.
- Assumptions: Agents and managers will primarily use Salesforce web UI.
- Risks: Short timeline for development; risk of scope creep.
- Mitigation: Follow phase-wise development with clear deliverables.

8. Acceptance Criteria & Success Metrics

- Tickets can be created, assigned, and resolved end-to-end.
- SLA timers start automatically upon ticket creation.
- Manager dashboards display open, pending, and closed tickets.
- Reports available for agent performance and resolution time.

9. Next Steps (Phase 2 Kickoff)

- Setup Salesforce Developer Org with correct edition.
- Configure company profile, business hours, holidays, and fiscal year.

- Create initial user accounts, profiles, and roles.
- Document sandbox usage and deployment basics.

10. Conclusion

Phase 1 provided a comprehensive understanding of the problem, stakeholders, and industry-specific use cases. It established the foundation for building a Salesforce-based Customer Support Ticketing System. The next phase will focus on Salesforce Org setup and initial configuration.