Assumptions

Fabrikam Service Intelligence & Automation Architecture Challenge

Assessment: M4 Mock Assessment – 2

Assumptions Table :

Area	**Assumptions**
Infrastructure	Required cloud services are available
Data Schema	CRM case data schema is available
Access Permissions	Required permissions are granted
Security	Identity system is configured
Monitoring	Logs and telemetry are available

UserCase 1

User Story 1 – Advanced Operational Reporting Design

Objective:

Design a clear operational report for support managers to monitor active cases and SLA status.

Dataset Logic:

Case data includes Case ID, Status, Priority, Assigned Agent, SLA target, and resolution time.

Data is filtered to focus on active and recent cases.

Filters:

Date, Status, Priority, and Agent are provided to quickly narrow down results.

Report Layout:

Cases are grouped by Priority and Status to highlight high-risk items.

Summary information is shown at the top, with detailed case data below.

Drilldown Concept:

Managers can drill from priority level to individual case details.

Performance Optimization:

Pre-filtered datasets and limited visuals are used to improve report performance.

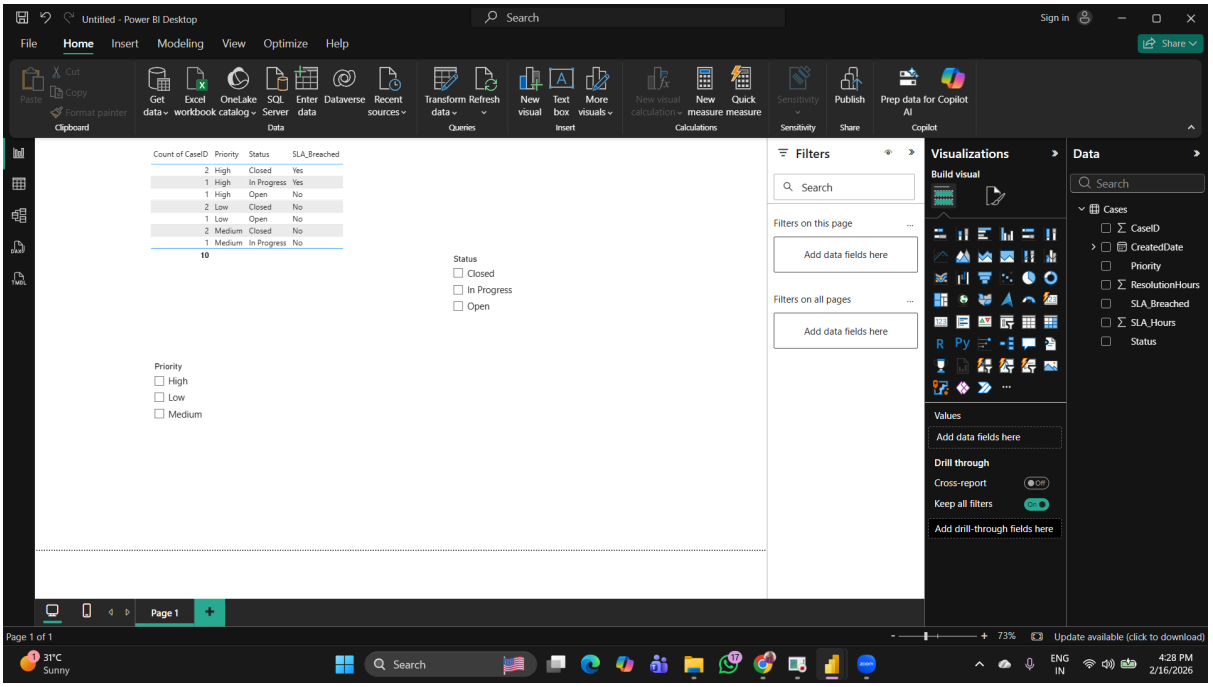


Figure: Operational Report showing case status and SLA monitoring

Usercase 2

User Story 2 – Executive Analytics Dashboard

Objective:

Provide leadership with high-level insights into case trends and SLA performance.

KPIs Used:

- Case volume trend to understand workload changes.
- SLA breach percentage to measure service quality.
- Average resolution time to track efficiency.
- Workload distribution by agent to balance resources.

Dashboard Layout:

Top section shows KPI cards.
Middle section shows trend charts.
Bottom section shows workload by agent.

Insights:

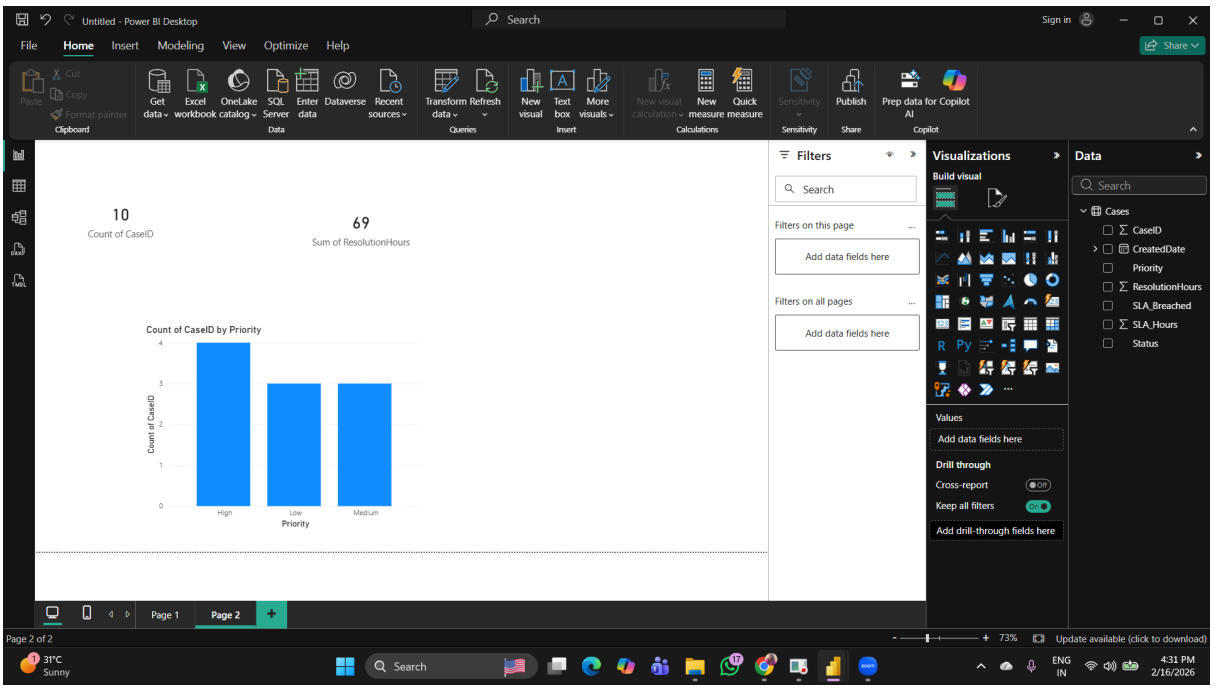
High-priority cases contribute more to SLA breaches.
Case volume increases during peak periods.

Business Decisions Enabled:

Better resource planning.
Early identification of SLA risks.

Limitations:

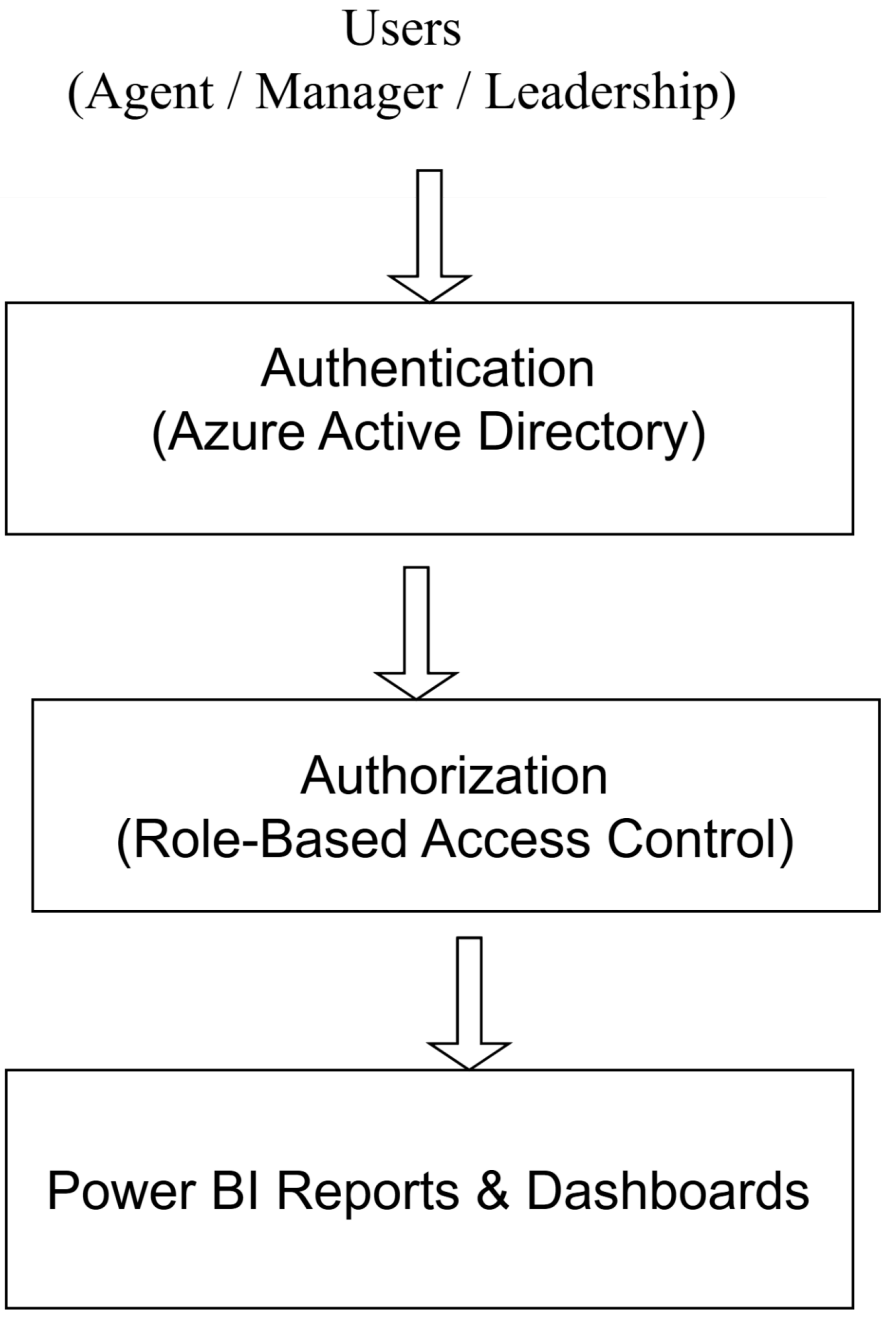
Insights are based on historical data.
Forecasting is trend-based, not predictive AI.



Executive dashboard showing SLA and case trends

UserCase 3

User Story 3 – Secure Distribution Architecture



Secure access architecture showing authentication and role-based authorization

Authentication is used to verify user identity using Azure Active Directory.

Authorization controls what data a user can access based on assigned roles.

Agents can view only their own data.
Managers can view team-level data.
Leadership has access to all reports.

Reports are shared securely through role-based access control.
External users are provided limited, read-only access.

This approach prevents unauthorized access and protects sensitive data.

User case 4

User Story 4 – Intelligent Automation Workflow

Objective:

Automatically detect SLA risk for high-priority cases and notify stakeholders before breach.

Trigger Logic:

When a high-priority case is nearing its SLA threshold and the status is not Closed.

Workflow Logic:

The system checks SLA time for high-priority cases.
If the SLA threshold is close, an alert is triggered.
A notification is sent to the assigned manager.
If the case is still unresolved, escalation is sent to leadership.

Failure Handling:

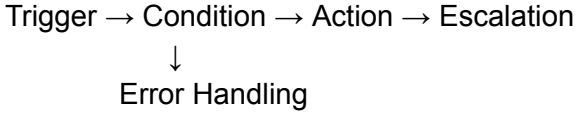
If notification fails, the system retries up to three times.
All failures are logged for monitoring.
Admin is notified if repeated failures occur.

Tool Justification:

Automation platform is used to reduce manual monitoring.
Event-based triggers are chosen to control cost and improve efficiency.

Cost Awareness:

Automation runs only when conditions are met.
This avoids unnecessary processing and reduces cost.



Automation workflow for SLA risk detection and notification

User Case 5

User Story 5 – Storage Optimization Architecture

Objective:

Reduce CRM storage usage and cost caused by large file attachments.

Problem:

Storing large attachments directly in CRM increases storage cost and affects performance.

Solution:

Attachments are moved to external storage after case closure.
Only secure reference links are maintained in CRM.

Archival Logic:

Attachments for closed cases older than a defined period are archived automatically.

Performance Impact:

CRM performance improves due to reduced storage load.
Attachment retrieval remains available through secure links.

Cost vs Performance Trade-off:

External storage reduces cost significantly.
Slight delay in file access is acceptable for archived data.

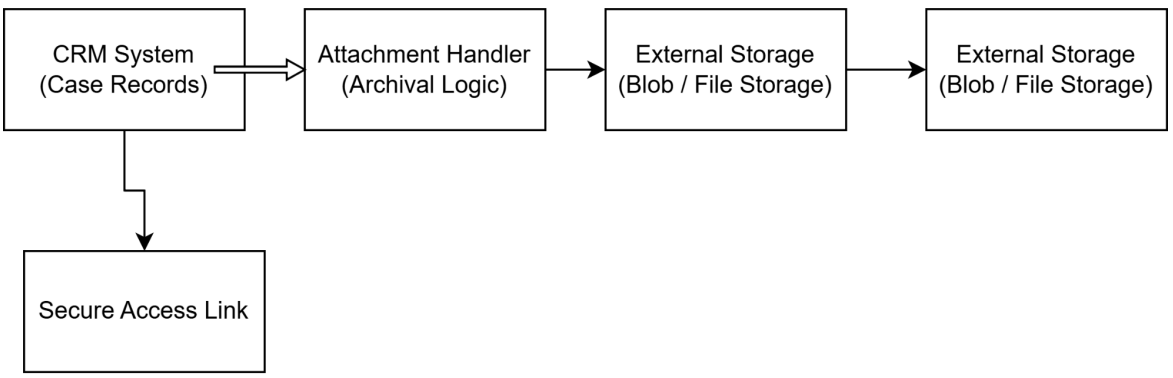


Figure: Architecture for attachment archival and storage optimization

Usercase 6

User Story 6 – Analytical Recommendation Report

Problem (Root Cause):
Manual monitoring of cases and lack of trend analysis lead to delayed SLA breach detection.

Metrics Used:
SLA breach percentage, average resolution time, and case volume trends are used to measure service performance.

Observations:
High-priority cases show a higher SLA breach rate.
Case volume increases during peak periods, impacting resolution time.

Risks:
Continued SLA breaches may result in penalties and customer dissatisfaction.
Increased workload without planning may reduce service quality.

Recommendations:
Introduce SLA alerts at 75% threshold to prevent breaches.
Plan staffing based on workload trends.
Focus more resources on high-priority cases.

Limitations:
Analysis is based on historical data.
Future trends may vary due to external factors.