Salesforce Project Implementation – AI-Powered Smart Case Routing

Problem Statement

In traditional customer support systems, **all incoming cases are routed manually or using simple rules** (such as based on keywords or customer type). This approach has several problems:

- ⚠️ **High-priority or negative cases may be delayed**, as they are not automatically identified.
- ⚠️ **Manual routing increases workload** for managers and support leads.
- ⚠️ **Customer dissatisfaction** grows when urgent cases are not resolved quickly.

Organizations need a **smart, automated, and scalable solution** to:

- Detect **customer sentiment** (Positive, Neutral, Negative) from case descriptions.
- Assign urgent/negative cases to the **right team** immediately.
- Provide **real-time visibility** into sentiment and priority trends for managers.

Phase 1: Problem Understanding & Industry Analysis

• Requirement Gathering: Customer service teams face delays when routing cases manually; urgent cases may not be prioritized.

• Stakeholder Analysis: Support Agents (need fair workload distribution), Managers (need visibility of high-priority cases), Customers (expect faster responses).

• Business Process Mapping: New case created → Analyze sentiment & priority → Assign to right queue/team → Notify stakeholders.

• Industry-specific Use Case Analysis: Applicable to customer support teams across e-commerce, IT services, telecom, and SaaS.

• App Exchange Exploration: Check Einstein Sentiment or free NLP connectors for enhancement.

Phase 2: Org Setup & Configuration

• Salesforce Edition: Developer Edition (free for students).

• Company Profile Setup: Configure time zone, currency, language.

• Business Hours & Holidays: Define working hours for support team.

• User Setup & Licenses: Create 2–3 dummy users (e.g., Junior Agent, Senior Agent, Manager).

• Profiles & Roles: Agent → Standard profile with case access. Manager → Higher role for visibility.

• Permission Sets: Give API/Einstein permissions if needed.

• OWD & Sharing Rules: Cases private → shared by role hierarchy.

Phase 3: Data Modeling & Relationships

• Objects: Use standard Case object.

• Fields: Add custom fields: Sentiment (Picklist), Priority Level (Picklist).

• Record Types: Optional, could separate 'Complaints' vs 'Feedback'.

• Page Layouts: Show sentiment & priority fields clearly.

• Schema Builder: Visualize case fields.

Phase 4: Process Automation (Admin)

• Validation Rules: Ensure sentiment is auto-filled when case created.

• Flow Builder: Record-Triggered Flow → On Case creation, update Sentiment based on text analysis. Decision element → If Negative + High priority → Route to Senior Queue.

• Email Alerts / Notifications: Send email/Slack alert when urgent negative case is logged.

• Tasks: Auto-create follow-up task for assigned agent.

Phase 5: Apex Programming (Optional Developer Enhancements)

• Apex Trigger: Before insert → call sentiment analysis service (if not using Einstein).

• SOQL: Query recent cases to display escalation trends.

• Test Class: Cover trigger for deployment readiness.

Phase 6: User Interface Development

• Lightning App Builder: Create a Service Console App for agents.

• Record Pages: Customize case record page → highlight sentiment.

• Home Page Layouts: Add dashboard component.

• Utility Bar: Add 'Quick Case Logger'.

Phase 7: Integration & External Access

• External Services: Connect to Hugging Face Sentiment API (if Einstein not enabled).

• Platform Events: Optional → Trigger alerts to Slack/MS Teams.

• API Limits: Ensure minimal calls (demo scale).

Phase 8: Data Management & Deployment

• Data Import Wizard: Import sample cases with descriptions.

• Duplicate Rules: Prevent duplicate case entries.

• Change Sets: If moving from sandbox to dev org.

Phase 9: Reporting, Dashboards & Security Review

• Reports: Cases by Sentiment, Cases by Priority.

• Dashboards: Pie chart of sentiment distribution, bar chart of high-priority vs normal.

• Security: Field-level security so only managers see internal priority logic.

Phase 10: Final Presentation & Demo Day

• Pitch Presentation: Problem → Solution → Demo → Benefits.

• Demo Walk through: Show case creation → auto sentiment analysis → routing → notifications → dashboard.

• Feedback Collection: Ask testers if routing improved.

• Portfolio Showcase: Upload screenshots & LinkedIn post.