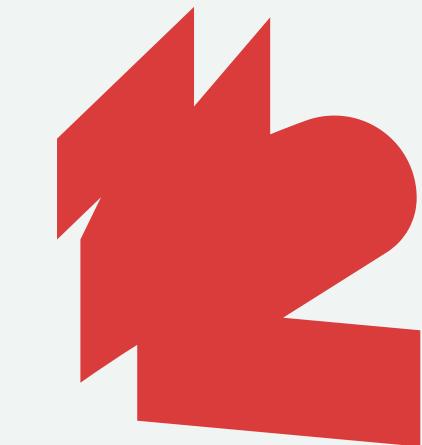


Scenario 02



Elcoga

by Group 2

17 April 2025

Company Overview

Elcoga

- Located in Sydney, Australia
- Working on **finance and accounting software**
- After-Sales Support
 - Contact Center
 - Product Support
 - Product Engineer



Scope & Objective



SCOPE

Build a system to streamline Elcoga's support process by replacing manual workflows, integrating **CRM** and **SolAct** into one internal portal for agents, and adding a customer portal for case tracking.

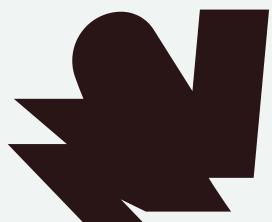
OBJECTIVE

- Digitize and automate the support case workflow
- Provide a unified interface for contact agents
- Enable customers to track case status online
- Improve team collaboration and solution delivery
- Enhance solution reuse through automatic updates to **SolAct**

AS-IS Process Overview

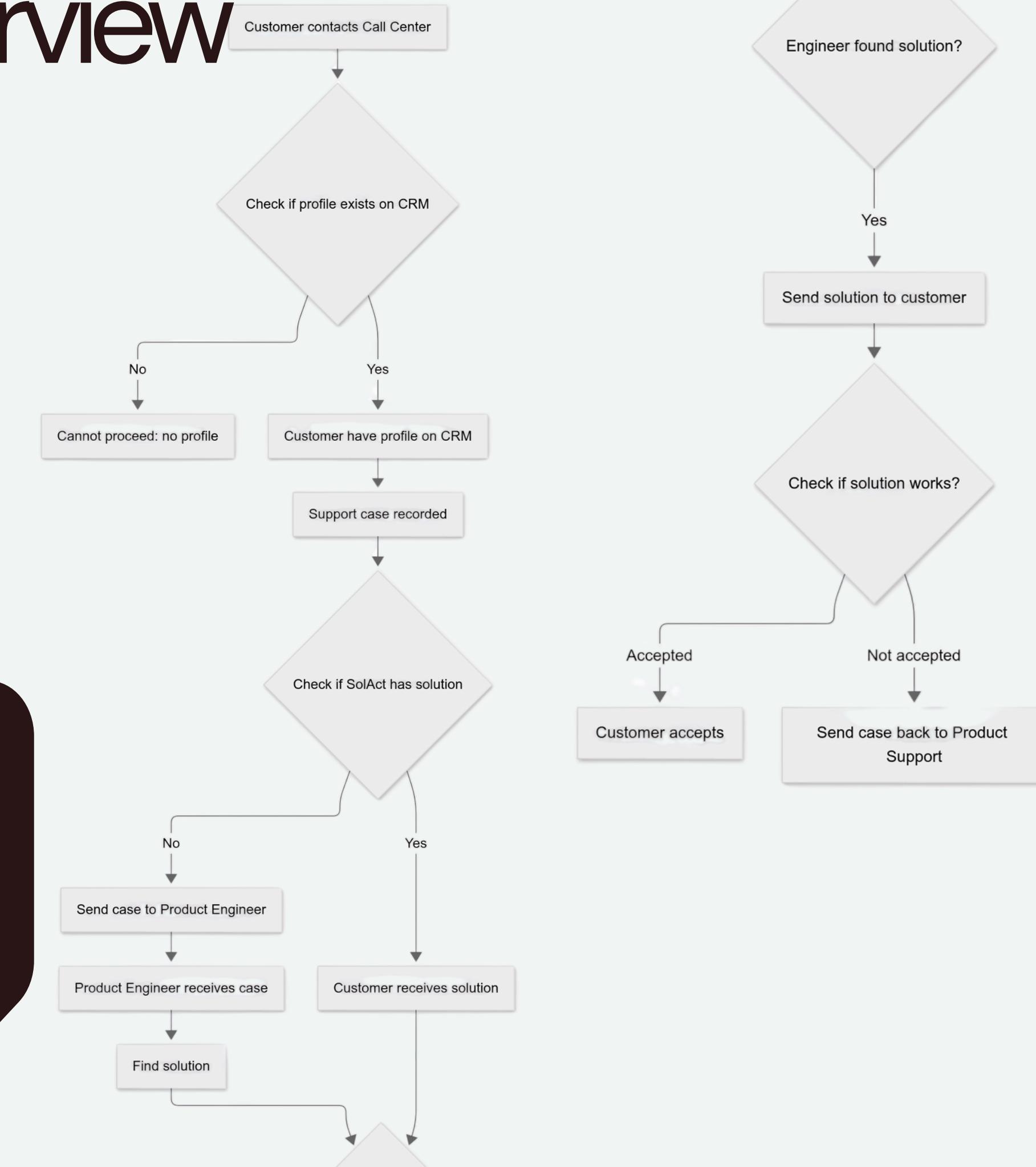
CURRENT ROLE OF PRODUCT SUPPORT (AS-IS)

When the Contact Center cannot find a solution in SolAct → the case is forwarded to the Product Support team



RESPONSIBILITIES OF PRODUCT SUPPORT:

- Check whether the issue is a known problem
- If it's a known issue and a solution is available → send the solution to the Contact Center
- If it's an unknown issue → escalate the case to the Engineering team for a fix
- Case forwarding is done via paper documents → manual, slow, and prone to errors



ROLE OF PRODUCT SUPPORT (NOW)



01

WHEN THE CONTACT CENTER
CANNOT FIND A SOLUTION IN
SOLACT → THE CASE WILL BE
FORWARDED TO PRODUCT
SUPPORT.

02

COMMUNICATION IS STILL
MANUAL (E.G., SENDING PAPER OR
EMAILS).

03

PRODUCT SUPPORT HAS TO WAIT
FOR INFORMATION FROM THE
CONTACT CENTER → SOMETIMES
THE INFORMATION IS
INCOMPLETE.

04

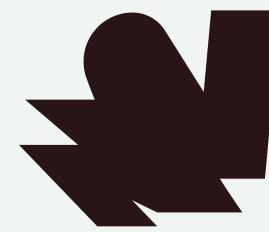
THERE IS NO CASE STATUS
TRACKING SYSTEM → CANNOT SEE
WHICH CASE IS PENDING OR HAS
BEEN SENT TO THE ENGINEER YET.

The role of the Product Support team
under the current process (AS-IS)

Problem Summary

01

The case forwarding process is still manual
→ Causes delays and is prone to errors.

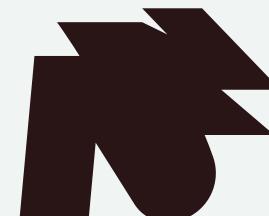


02

The CRM system and SolAct are separate → Staff have to log in to multiple systems / frequently switch screens.

03

No real-time case status tracking system → Don't know who has the case or where the delay is.



04

Some customer information or case details may be incomplete
→ This causes Product Support to have to ask the same questions multiple times.

TO-BE Process

DESIGN A NEW, AUTOMATED SUPPORT PROCESS

01

Automated workflow to replace manual, paper-based case handling

02

Internal Portal for Contact Center and Product Support team

- Single interface to view customer profile, product information, and solution records
- Integrated access to CRM and SolAct systems

03

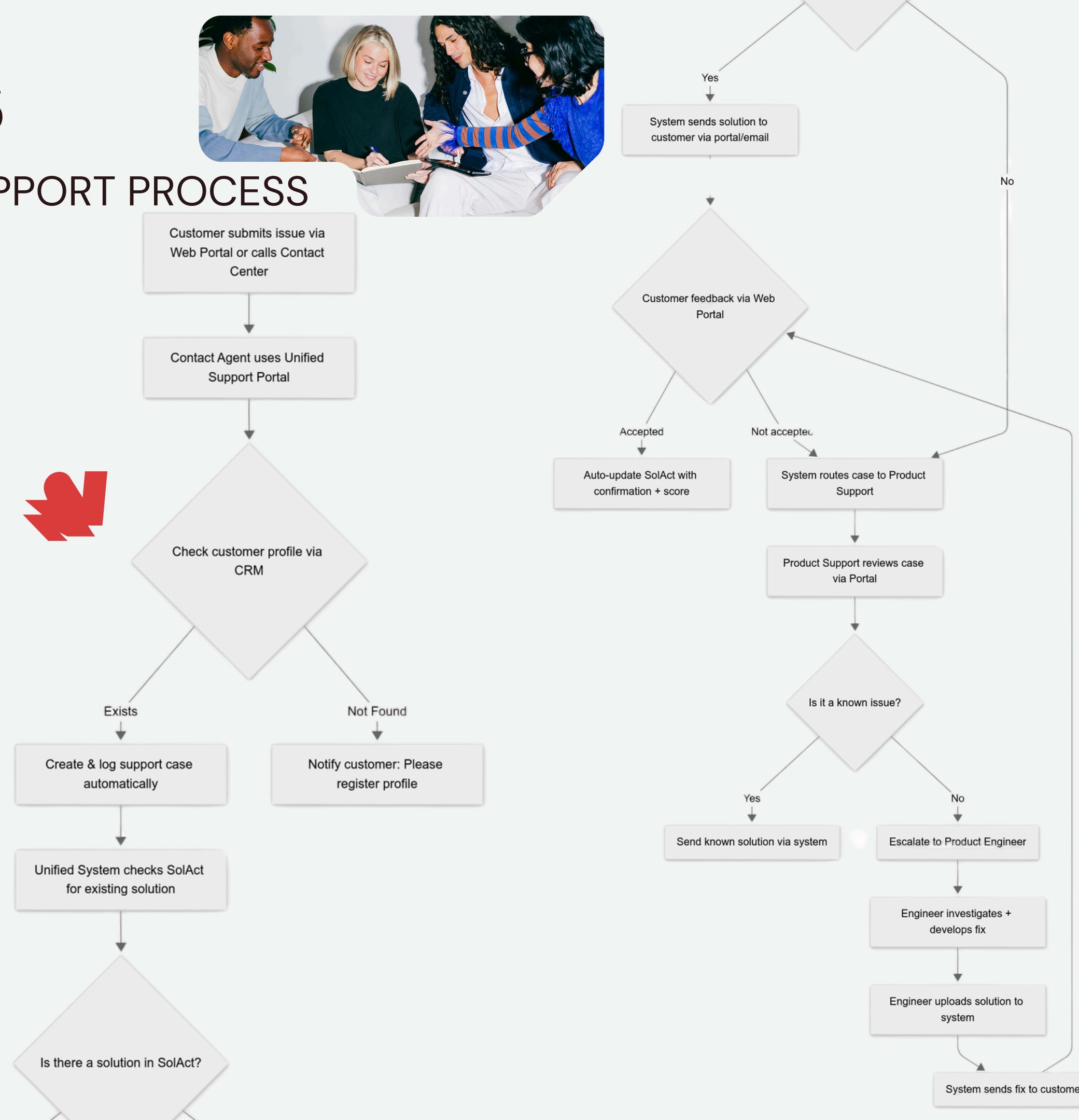
Customer Web Portal

- Allows customers to track support case status online
- Reduces the number of follow-up calls to the Contact Center

04

Centralized Data Access

- No more switching between multiple systems and logins
- Improves response time and reduces human error



Proposed System Features

Admin

Feature	Explanation
Single Interface View	combines CRM + SolAct + case information on a single page
Auto Case Assignment	Auto Case Assignment automatically assigns tasks to Product Support
Workflow Automation	Cases are automatically forwarded in sequence → No need for paper or email.
Task Dashboard	Display the list of pending cases / in progress / closed cases
Real-time Notification	Immediate notification when there is a new case or a customer response
Access Control & Logging	records who did what in the system → For security and retrospective auditing

Customer

Feature	Explanation
Submit Case Online	Customers can create cases through the website themselves.
Case Status Tracking	Customers can check the status of their cases. Real-time
View Solution History	View the history of previous answers or fixes.
Feedback / Accept Fix	Customers can accept or reject the solution through the website.
Notification Alerts	Notification Alerts Automatic notifications when there are replies or updates from the team.



Tools / Platform Suggestion

Tools

Pro.

Jira

Workflow Assign task

Microsoft Power Apps

Portal, Custom

Salesforce

CRM + Case system

AS-IS vs TO-BE



Process Step	AS-IS (Current)	TO-BE (Improved System)	Customer Notification	Agent calls or emails customer manually	System sends automatic email/notifications through Portal
Case Submission	Customer calls the Contact Center	Customer submits a case via Web Portal or still has the option to call	Customer Response	Customer has to call back or follow up multiple times	Customer can respond/give feedback directly through Web Portal
Customer Profile Verification	Agent manually checks CRM	Portal connects to CRM and verifies automatically	SolAct Update	Manually updated by staff	Automatically updates SolAct once feedback is received
Solution Search	Manual search in SolAct	System checks SolAct automatically through a Unified Portal	Case Tracking	No tracking system, customer must ask the agent	Dashboard for staff and customers to view real-time case status
Escalation to Product Support	Uses paper/email/messages to forward cases	Workflow Automation instantly forwards the case in the system	Speed & Accuracy	Slow and prone to human error	Much faster and reduces human error
Engineer Workflow	Waits for manual handover from Support team	System automatically notifies and assigns cases with status tracking			

Benefits

- O1** REDUCE CASE HANDLING TIME
- O2** REDUCE STAFF WORKLOAD
- O3** INCREASE ACCURACY
- O4** IMPROVE CUSTOMER SATISFACTION
- O5** ENABLE FUTURE ANALYTICS SYSTEM EXPANSION



CONCLUSION



- The new system enhances the efficiency of Product Support operations.
- It addresses previous issues caused by manual processes and fragmented systems.
- The system is built on a scalable and extensible architecture.

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