# Customer Support Case Management with Escalation

# Problem Statement

Companies handling large volumes of customer issues often face delays in resolving cases due to manual processes. Customers want faster resolution and clear communication about their issues, while managers need real-time insights into support performance. A Salesforce-based Case Management system can automate case assignment, send timely alerts, escalate unresolved issues, and provide dashboards for monitoring. This improves customer satisfaction and optimizes support team efficiency.

**Phase 1: Problem Understanding & Industry Analysis**

## Requirement Gathering

* **Stakeholders** – Customers, support agents, team managers, and admins.
* **Customer Needs** – Simple way to raise complaints/issues, receive timely updates, and faster resolution.
* **Support Staff Needs** – Tools to automatically receive assigned cases, track progress, and escalate unresolved cases.
* **Manager Needs** – Dashboards to track open cases, escalations, and team performance.

**Stakeholder Analysis**

## Customers → End users raising issues (technical, billing, general queries).

## Support Agents → Handle assigned cases, update progress, and resolve issues.

## Managers → Monitor escalated cases, overall support performance, and SLA compliance.

## Admins → Configure case rules, automation flows, and maintain system.

## Business Process Mapping

## Customer raises a Case in Salesforce (via portal/email).

## Case is automatically assigned to correct queue based on Case Type.

## Support agent works on resolving the case.

## Email notifications sent to customer and agent on creation/updates.

## If unresolved within 48 hours, case status updated to Escalated and manager notified.

## Managers can take proactive actions on escalated cases.

## Use Cases

* **Case Creation & Assignment** – Customers log issues, cases auto-assigned to queues (Technical/Billing/General).
* **Notifications** – Email alerts sent to customers & agents on case creation and escalation.
* **Escalations** – Cases not closed within SLA (48 hrs) auto-escalated and reassigned.
* **Case Tracking** – Support team updates status; customers can track case progress.
* **Performance Dashboards** – Managers receive an email notification when a case escalates.

## AppExchange Exploration

* Email-to-Case Premium – Advanced automation for customer email-to-case conversions.
* Service Cloud Voice – Integrates telephony with case management for real-time support.
* Survey Force – Collects customer feedback post-case resolution to measure satisfaction.
* Slack Integration for Service Cloud or Omni-Channel to show research.