Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Project Title: Manufacturing After-Sales & Service CRM

Phase 1: Problem Understanding & Industry Analysis

1. Problem Statement:

Manufacturing companies face growing challenges in their after-sales service operations. Customers often encounter delayed responses, lack of visibility into service requests, and frequent warranty or AMC disputes due to manual and error-prone tracking. Service teams operate without real-time case visibility, which results in inefficient engineer dispatching and missed SLA commitments.

Field engineers are dispatched without considering skills or location, leading to longer turnaround times and reduced efficiency. Management has limited insights into product defects, engineer utilization, and service performance, making it difficult to optimize costs or improve customer satisfaction.

Without a centralized CRM solution, after-sales service processes remain fragmented, creating poor customer experiences and significant operational inefficiencies.

2. Stakeholder Analysis:

Stakeholder	Role	Needs
Customers	Register products, raise service requests, track warranties/AMCs	Quick service resolution, warranty clarity, real-time request visibility
Service Agents	Manage cases, assign engineers, handle warranty disputes	Automated case assignment, SLA tracking, reduced manual effort
Field Engineers	Perform on-site repairs and maintenance	Clear job assignments, optimized scheduling, ability to update job status
Product Managers	Track product failures, analyze service data	Reports on product defects, recurring issues, and spare parts demand
Management	Oversee SLA compliance, service costs, customer satisfaction	Performance dashboards, SLA breach alerts, operational insights

3. Business Process Mapping:

Steps in the After-Sales Service Lifecycle:

1. Customer purchases a product and registers it.
2. Warranty/AMC details are validated.
3. Customer raises a service request.
4. Case is auto-assigned to a service agent.
5. Service agent dispatches the nearest skilled engineer.
6. Engineer completes the service and updates closure.
7. Customer feedback is collected, reports generated for management.

4. Industry-Specific Use Cases:

- **Warranty & AMC Lifecycle Management**: Automating warranty validation and AMC tracking.
- **Case Management with SLAs**: Ensuring timely response and resolution to customer requests.
- **Field Engineer Scheduling & Tracking**: Assigning engineers based on skill and location.
- **Predictive Maintenance (IoT Integration)**: Anticipating failures before they occur.
- **Customer Satisfaction Tracking**: Collecting feedback for quality improvements.

5. AppExchange Exploration & Decision:

We explored Salesforce Field Service and Service Cloud Einstein as potential solutions. While these provide robust capabilities, we chose to implement a custom Salesforce CRM build for demonstration purposes. This allows end-to-end showcasing of configuration, automation, coding, and integrations within Salesforce without dependency on paid AppExchange products.