Integrated Customer Sales and Support System

Phase 1: Problem Understanding & Industry Analysis

Overall Problem Statement

The fundamental problem this project addresses is departmental isolation and fragmented customer data. When sales and support teams operate independently, they don't share information. This creates critical issues:

- **Customer Dissatisfaction:** Support agents lack context, forcing customers to repeat their information.
- **Operational Inefficiency:** Sales teams are unaware of customer issues, which can negatively affect renewals or new sales.
- **Lack of a Unified View:** Neither team has a single, complete view of the customer relationship.

This project solves the problem by creating a single source of truth for all customer information. By linking sales data (Leads, Accounts, Opportunities) and support data (Cases) to a central Account record, it breaks down the organizational barriers and creates a unified system.

Project Goals

- Keep a list of potential customers (leads) and check their interest.
- Manage sales deals (opportunities) and track progress.
- Save customer information as accounts and contacts after sales.
- Handle customer support cases and assign them to the right agent.
- Help sales and support teams work better together by sharing customer information.
- Send automatic alerts to teams.
- Show simple reports to track sales and support work.

❖ Requirement Gathering

- **Core Requirements:** To build a system that connects a **Sales Cloud** process with a **Service Cloud** process.
- **Functional Requirements:** The system must be able to create Case records, and both sales and support users must be able to view each other's data (e.g. a sales user seeing a customer's Case history).
- **Non-Functional Requirements:** Requirements for system security and performance.

❖ Stakeholder Analysis

A stakeholder is anyone affected by the project. Analysing them ensures their needs are met.

- **Primary Stakeholders:** The **Sales Team** and the **Support Team**.
- **Key Needs:**

  Sales Team: Requires read-only access to customer support records to gain a complete understanding of customer health.

  Support Team: Requires read-only access to a customer's sales and opportunity history to provide context-aware service.

❖ Business Process Mapping

- **Current Process:** A sale is completed, but a customer's subsequent support issue is invisible to the sales team because the data is in separate compartments.
- **New Process:** The new process will link a Case to a central Account record. This allows a sales user to see all related Cases and a support user to see all related Opportunity history.

❖ Industry-specific Use Case Analysis

- **Standard Solution**: This project utilizes the industry-standard approach for customer relationship management, which leverages a combination of Sales Cloud and Service Cloud within the same platform.
- **Data Model**: The solution is built around the Account object serving as a central hub. The data model is structured as follows:
  - The Account object is the central parent.
  - Opportunities and Cases are child objects of the Account, linked by standard lookup relationships.
  - This structure naturally facilitates a 360-degree view, as all related records are accessible from the parent Account record.

❖ AppExchange Exploration

- **Purpose:** To determine if a pre-built application can accelerate project development and provide functionalities that are not native to the platform.
- **Conclusion:** The core project objective—creating a unified customer view—is a foundational use case for Salesforce. This can be accomplished through standard object configuration and security settings. As such, a review concluded that no third-party applications are required to meet the project's primary goals.