## Phase 1: Problem Understanding & Industry Analysis

### Requirement Gathering

Stakeholder Interviews: Conduct interviews with bank tellers, customer service agents, team leads, and branch managers to understand their daily challenges.

**Example Requirements:**

1.Log all customer interactions (phone calls, emails, chat).

2.Route incoming cases to the correct agent based on issue type and agent skill set.

3.Provide a single view of the customer, including account history and past cases.

4.Automate notifications to customers about their case status.

5.Escalate cases automatically if they are not resolved within a specific timeframe.

6.Provide analytics on case volume, agent productivity, and resolution times.

### Stakeholder Analysis

Service Agents: The primary users who will log cases and interact directly with customers.

Team Leads: Responsible for monitoring agent performance, reassigning cases, and approving escalations.

Branch Managers: Need high-level reports to understand service performance across different branches.

Admin: Manages system configuration, user access, and data security.

### Business Process Mapping

Flow: Customer contacts the bank → Agent logs a new case → Case is routed to the appropriate agent → Agent works on the case → Case is resolved or escalated → Customer is notified.

### Industry-specific Use Case Analysis

In the banking industry, security and compliance are paramount. The CRM must handle sensitive customer data securely. Case routing is critical to ensure that specialized issues (e.g., credit card fraud, loan applications) are handled by the right experts. Automation is key to reducing manual effort and human error.

### AppExchange Exploration

Search for "banking CRM" or "case management." While some solutions exist, a custom solution is needed to handle the bank's unique processes and security requirements.