## Problem Statement:

**“Customer Service Management System for Banks”**

A mid-sized bank is struggling with its customer service operations. They lack a centralized system to track customer interactions, leading to delayed case resolution and fragmented information. Service agents are unable to get a complete view of a customer's history, causing them to ask for information repeatedly and frustrating customers. The manual processes for case routing and follow-up are inefficient, and managers lack the visibility to monitor agent performance and identify bottlenecks. This is resulting in decreased customer satisfaction and loyalty. The bank needs a comprehensive solution to streamline their customer service, centralize data, and improve efficiency.

## Project Overview

This project outlines the development of a Customer Service CRM on the Salesforce platform for a mid-sized bank. The CRM is designed to centralize customer information, streamline case management, and improve the efficiency and quality of customer support. The system will provide a 360-degree view of the customer, automate common service tasks, and enable managers to monitor team performance with comprehensive reports and dashboards.

## Objectives

The primary goals of this CRM are to enhance the bank's customer service operations by providing a single source of truth for all customer interactions, reducing case resolution times, and increasing customer satisfaction. The system aims to empower service agents with the right tools and information to resolve issues quickly and effectively, leading to improved customer loyalty and retention.