Customer Complaint CRM Project – Full Explanation

Project Overview

Objective:
The Customer Complaint CRM is designed to streamline the management of customer complaints, ensuring that issues are logged, tracked, and resolved efficiently. The system aims to improve customer satisfaction, reduce response times, and provide actionable insights to management.

Problem Statement:
In many organizations, customer complaints are handled inconsistently, leading to delays, miscommunication, and unsatisfactory resolutions. Without a centralized system, it becomes challenging to track the progress of complaints, assign tasks effectively, and measure team performance.

Solution:
The Customer Complaint CRM provides a **centralized platform** for managing complaints from initial submission to resolution. Key features include:

- **Complaint Logging:** Easy submission of complaints by customers via multiple channels.
- **Ticket Management:** Automated assignment and prioritization of complaints to appropriate agents.
- **Real-time Tracking:** Status updates and notifications for both customers and agents.
- **Reporting & Analytics:** Insights into complaint trends, response times, and team performance.
- **Role-Based Access:** Secure access for agents, managers, and administrators.

Benefits:

- Faster and more transparent complaint resolution.

- Improved customer satisfaction and loyalty.
- Enhanced agent productivity through automated workflows.
- Data-driven insights for continuous improvement.

Scope:
The CRM will handle complaints across all customer touchpoints, provide reporting dashboards for managers, and support automation features to reduce manual intervention. Future enhancements may include AI-based ticket categorization and predictive analytics to prevent recurring issues.

Phase 1: Problem Understanding & Industry Analysis

👉 **Goal**: Understand what we're building and why.

1. **Requirement Gathering**
    - Talk to stakeholders (customer, support agent, support manager).
    - Example requirements:
        - Track all complaints with status and category.
        - Assign complaints automatically to right team.
        - Ensure SLA deadlines are tracked.
        - Escalate unresolved complaints to managers.
        - Generate reports on top complaint reasons.
2. **Stakeholder Analysis**
    - **Admin (you)** – configures the system.
    - **Support Agents** – log complaints, update status.
    - **Manager** – monitors escalations, approves closures.
    - **Customer Service Head** – checks reports, resolves SLA issues.

3. **Business Process Mapping**
   Flow:
   Customer raises complaint → Case created in Salesforce → Assignment Rule → Agent updates progress → SLA monitored → Escalation if overdue → Resolved → Closed.

4. **Industry-specific Use Case Analysis**
   - In retail/food, complaints are frequent and SLA-driven.
   - Companies must track reasons (Delivery, Service, Billing, Hygiene).
   - Helps improve service quality by analyzing patterns.
5. **AppExchange Exploration**
   - Some complaint management apps exist (Service Cloud add-ons).
   - But building a lightweight custom version fits learning goals and time frame.

Phase 2: Org Setup & Configuration

👉 **Goal:** Prepare Salesforce environment.

1. Salesforce Edition – Developer Org.
2. Company Settings – update local time zone & currency.
3. Business Hours – set 9am–6pm.
4. Users – create *Support Agent* and *Manager*.
5. Profiles – Agent (limited) vs Manager (full).
6. Roles – Manager on top → Agents below.
7. Permission Sets – extra access to Reports/Dashboards.
8. OWD – Cases Private, Accounts Public Read Only.

9. Sharing Rules – Manager sees all Cases, agents see only their own.
10. Queues – `Complaints_Queue`, `Escalation_Queue`.
11. Login Policies – restrict agents to office hours (optional).

Phase 3: Data Modeling & Relationships

👉 **Goal:** Build data structure.

1. **Objects**
   - Standard: Account (Stores), Contact (Customers), Case (Complaints).
   - Custom fields on Case: Category__c, Channel__c, Store__c, SLA_End_Date__c, Escalated__c, Root_Cause__c.
2. **Fields**
   - Category__c (Picklist: Delivery, Billing, Service, Hygiene).
   - Channel__c (Picklist: Web, Phone, Email, Store).
   - SLA_End_Date__c (DateTime).
   - Escalated__c (Checkbox).
   - Root_Cause__c (Long Text).
3. **Page Layouts**
   - Complaint layout: show Priority, SLA timer, Root Cause.
   - Store layout: show related complaints.
4. **Schema Builder**
   - Case → Contact → Account relationships visualized.

Phase 4: Process Automation (Admin)

👉 **Goal:** Automate tasks.

1. Assignment Rule – route cases to queue by Category.
2. Auto-response Rule – send acknowledgement email.
3. Flow (Before Save) – calculate SLA_End_Date.
4. Scheduled Flow – flag Escalated__c if overdue.
5. Validation Rule – prevent Case without Category.
6. Email Alert – notify manager when escalated.

Phase 5: Apex Programming (Developer)

👉 **Goal:** Add advanced logic.

1. Apex Trigger (optional) – auto-update Escalated__c when SLA breached.
2. SOQL – query cases nearing SLA.
3. Queueable Apex (optional) – send bulk reminders.
4. Test Classes – ensure 100% coverage for triggers/classes.

Phase 6: User Interface Development

👉 **Goal:** Make it user-friendly.

1. Lightning Record Page – for Complaint Case type.
2. Tabs – Complaints, Customers, Stores.

3. Home Page – dashboard of open complaints.
4. Quick Action – “Log Complaint.”
5. (Optional) LWC – SLA countdown timer on Case page.

Phase 7: Integration & External Access

👉 **Goal:** Connect with outside systems.

1. Web-to-Case – collect complaints from website.
2. Email-to-Case – generate cases from emails.
3. Remote Sites – not needed unless calling APIs.

Phase 8: Data Management & Deployment

👉 **Goal:** Manage data and move changes.

1. Import 50 sample complaints using Data Import Wizard.
2. Export sample complaints for testing.
3. Backup weekly (Data Export).
4. Change Sets – deploy from Sandbox → Production.

Phase 9: Reporting, Dashboards & Security Review

👉 **Goal:** Monitor & secure system.

1. Reports:

- Complaints by Category.
- SLA Breaches.
- Complaints by Store.

2. Dashboard: Complaints KPIs for Managers.
3. Security:
    - Complaints Private.
    - Managers see all, agents see only their own.
    - Field-level security on Root_Cause__c.

Phase 10: Final Presentation & Demo Day

👉 **Goal:** Wrap it like real delivery.

1. Pitch: Problem → Solution → Benefits.
2. Demo Walkthrough: create complaint, show SLA, escalate, resolve.
3. Reports & Dashboard demo.
4. Handoff Documentation: this doc + screenshots.
5. Portfolio: Share project on LinkedIn as CRM demo.
