🚀 Phase 1: Problem Understanding & Industry Analysis

This phase sets the **foundation** for your CRM project. The goal is to deeply understand the **problem space**, analyze the **industry requirements**, and align the CRM solution with **stakeholders' expectations**.

🔹 1. Requirement Gathering

What it means:
Requirement gathering is the process of collecting, analyzing, and documenting the needs of the business and end-users. It helps define *what* the CRM system must achieve.

How to do it:

- Conduct **interviews** with stakeholders (customers, agents, managers).
- Send out **surveys** to understand common pain points in complaint handling.
- Analyze **existing complaint logs** (emails, Excel sheets, or manual registers).

Key questions to ask:

- How are customer complaints currently tracked?
- What challenges do agents face in resolving complaints?
- What reports do managers want to see?
- Do customers get regular updates on their complaints?

Example requirements for Customer Complaint CRM:

- Customers should be able to log complaints through **website, email, or phone**.
- Agents should be able to **view, assign, and close complaints**.

- Managers should be able to **analyze complaint trends** and **agent performance**.
- System should send **automatic notifications** when complaint status changes.

Deliverable:
A **Requirement Specification Document** with **must-have features (core)** and **nice-to-have features (future scope)**.

🔹 2. Stakeholder Analysis

What it means:
Identifying the key people (stakeholders) who will be impacted by the CRM and understanding their expectations.

Stakeholder Categories for this project:

1. **Customers (External Stakeholders)**
   - Role: Log complaints and track their resolution.
   - Expectation: Fast response, transparency, updates.
2. **Support Agents (Internal Stakeholders)**
   - Role: Handle and resolve complaints.
   - Expectation: Easy access to customer data, clear case assignment, reduced manual effort.
3. **Managers/Supervisors**
   - Role: Monitor agent performance, oversee complaint resolution.
   - Expectation: Dashboards, SLA compliance tracking, escalations.
4. **System Administrators**
   - Role: Configure Salesforce, manage user roles, maintain security.
   - Expectation: Customization flexibility, easy maintenance.

5. **Top Management**
   - Role: Ensure customer satisfaction and business growth.
   - Expectation: Reports to measure overall complaint trends and decision-making insights.

Deliverable:
A **Stakeholder Map** (a table or diagram with roles, responsibilities, and expectations).

🔹 3. Business Process Mapping

What it means:
Visualizing how complaints are currently handled (**AS-IS process**) and how the new CRM will improve it (**TO-BE process**).

AS-IS Example (Manual Process):

1. Customer calls customer care → details written on paper.
2. Complaint forwarded via email/WhatsApp.
3. No tracking system → customer keeps following up.
4. Resolution happens but no record of timelines or satisfaction.

TO-BE Example (CRM-enabled Process in Salesforce):

1. Customer submits complaint via **web portal/email/chatbot**.
2. Salesforce automatically creates a **case record**.
3. Case is **auto-assigned** to the right agent (based on skill/rules).
4. Agent updates case progress in real-time.
5. Customer gets **automated notifications** (case created, in-progress, resolved).
6. Managers view **dashboards** for trends, escalations, SLA breaches.

Deliverable:
Business Process Diagrams:

- **AS-IS model** (manual flow)
- **TO-BE model** (Salesforce-enabled flow)

🔹 4. Industry-Specific Use Case Analysis

What it means:
Every industry faces different kinds of customer complaints. Aligning your CRM to one industry makes the project realistic.

Example: Car Rental Industry (if you choose this):

- Common Complaints:
  - Vehicle not available on booking.
  - Poor vehicle condition.
  - Overbilling/hidden charges.
  - Late pickup/drop-off.
  - Refund delays.
- CRM Use Cases:
  - Auto-logging complaints directly from the booking system.
  - Assigning complaints to specialized teams (billing, maintenance, scheduling).
  - Tracking SLAs (e.g., refund within 7 business days).
  - Manager dashboards to identify frequent complaint categories.

Other industries you could consider:

- **Banking**: Failed transactions, fraud reports.

- **Telecom**: Network downtime, billing errors.
- **Retail/E-commerce**: Product quality, delivery issues.

Deliverable:
An **Industry Use Case Document** describing complaint categories and CRM solutions.

🔹 5. AppExchange Exploration

What it means:
Salesforce AppExchange is like an **app store** where you can find ready-made solutions. Exploring it helps you decide whether to build from scratch or enhance existing apps.

How to explore:

1. Go to AppExchange.
2. Search for: *Complaint Management, Case Management, Customer Service*.
3. Review apps like:
   - **Salesforce Service Cloud Extensions** (case management add-ons).
   - **Complaint Management Apps** (industry-specific).
   - **Chatbots/AI Tools** (for customer service automation).

Deliverable:
A **comparison table** of top 2–3 apps with features, pros/cons, and decision whether to use them or not.
