

## □ Phase 1: Problem Understanding and Industry Analysis

### ◆ 1. Requirement Gathering

The first step in developing the *Customer Complaint Management System* is to **understand the exact needs** of the users and organization.

#### ❖ Objective:

To identify what the system should do, who will use it, and what features are required.

#### □ Description:

Information is collected from various sources such as:

- Customer service agents
- Managers
- Admins
- End-users (customers)

The gathered requirements are divided into two types:

#### ✓ Functional Requirements:

These describe what the system should do.

- Register a new customer complaint.
- Assign complaints automatically to the right agent.
- Track complaint status (New, In-progress, Resolved).
- Send automatic notifications to customers.
- Generate reports and dashboards for management.

#### ⌚ Non-Functional Requirements:

These describe how the system should perform.

- The system should be secure and reliable.
- The interface should be user-friendly.
- It should provide fast response time and high availability.

☞ *Outcome:* A clear list of system needs that will guide the design in the next phase.

### ◆ 2. Stakeholder Analysis

In this step, all people or groups involved in the project are identified. Each stakeholder has a specific role and expectation from the system.

#### ❀ Stakeholders Involved:

Stakeholder	Role	Responsibilities
<b>Customers</b>	Complaint submitter	Register complaints and track status
<b>Customer Service Agent</b>	Resolver	Handle and update complaint progress
<b>Manager/Admin</b>	Supervisor	Monitor cases, assign agents, and generate reports
<b>Salesforce Developer</b>	System creator	Customize and build the CRM system
<b>System Administrator</b>	Maintainer	Manage user permissions and performance

☞ *Outcome:* Understanding of roles helps in defining user permissions and building relevant modules in Salesforce.

### ❖ 3. Business Process Mapping

Business process mapping means **visualizing the workflow** of how a complaint is handled from start to finish.

#### ⌚ Typical Workflow:

1. **Customer submits a complaint** through a web form or Salesforce portal.
2. **System automatically generates a case record** and assigns it to a support agent.
3. **Agent reviews and updates** the case with the resolution steps.
4. **Customer gets notified** through an email alert about updates.
5. **Manager monitors** all cases using dashboards and reports.
6. Once resolved, the **case is closed** and stored for future reference.

#### ⌚ Purpose:

- Understand how information flows in the organization.
- Identify which parts can be automated using **Salesforce Flow** or **Process Builder**.
- Design a system that matches real-life business needs.

☞ *Outcome:* A clear picture of the workflow that will guide system automation design.

### ❖ 4. Industry-Specific Use Case Analysis

Different industries have different types of complaints. By analyzing these, we can design a flexible system that fits multiple sectors.

#### ☒ Examples by Industry:

Industry	Example Complaint	Purpose of System
<b>Telecom</b>	Network outage or billing issue	Track and resolve technical problems faster
<b>Banking</b>	Transaction failure or service delay	Ensure secure and quick handling of customer issues

Industry	Example Complaint	Purpose of System
E-commerce	Wrong delivery or refund delay	Improve delivery and return process tracking
Healthcare	Appointment or billing issue	Manage patient and service-related complaints

#### Purpose:

- Understand how complaint management varies by industry.
- Build a **customizable Salesforce app** that can be easily adapted to any sector.

 *Outcome:* A strong understanding of industry requirements that ensures practical project design.

#### 5. AppExchange Exploration

**Salesforce AppExchange** is a marketplace where developers and companies share pre-built Salesforce applications and components.

#### Objective:

To explore existing Complaint Management or CRM apps to understand:

- What features they provide.
- How they are structured in Salesforce.
- What improvements can be made in your project.

#### Activities:

- Search for apps like “Customer Complaint Manager” or “Service Cloud Cases.”
- Study their dashboards, case automation, and reports.
- Identify reusable components (for example, prebuilt case management templates).
- Learn Salesforce best practices for building complaint systems.

 *Outcome:* Helps to design your project efficiently using proven Salesforce components and automation tools.