

## □ 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
Customers	Complaint submitter	Register complaints and track status
Customer Service Agent	Resolver	Handle and update complaint progress
Manager/Admin	Supervisor	Monitor cases, assign agents, and generate reports
Salesforce Developer	System creator	Customize and build the CRM system
System Administrator	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
Telecom	Network outage or billing issue	Track and resolve technical problems faster
Banking	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.