**Salesforce Project**

**👉 Project Title: *“E-Commerce Customer Support & Case Management System”*  
👉 Industry: E-Commerce / Retail  
👉 Type: B2C Salesforce Service Cloud Implementation  
👉 Target Users: Support Agents, Managers, and Customers**

* **Problem Statement**

An e-commerce company receives thousands of customer queries daily regarding order tracking, returns, and complaints. Currently, these requests are handled manually through emails, calls, and spreadsheets, causing delays, missed follow-ups, and poor customer satisfaction. Managers also lack visibility into agent performance and service quality.

To address these challenges, the company requires a Salesforce Service Cloud implementation that:

* Centralizes all customer service requests into one CRM system.
* Automates case creation and assignment to agents.
* Sends real-time notifications and updates to customers.
* Tracks resolution progress and maintains complete service history.
* Provides dashboards and reports for monitoring productivity and customer satisfaction.

**📌 Phase 1: Problem Understanding & Industry Analysis**

**1. Requirement Gathering**

We interact with stakeholders (support agents, managers, customers) to identify pain points:

* Customer complaints and return requests are handled manually (emails, calls, spreadsheets).
* Agents face difficulty prioritizing urgent cases.
* Delays in response reduce customer satisfaction.
* Managers lack real-time visibility into service performance.

**Key Business Requirements:**

* Automate case creation (from email, web form, or chatbot).
* Assign cases to agents automatically (based on region, workload, or skill).
* Notify customers about updates via SMS/Email.
* Track case lifecycle (Open → In Progress → Resolved).
* Create dashboards for monitoring agent performance and customer satisfaction.

**2. Stakeholder Analysis**

* Support Agents → Need a system to view, manage, and resolve cases efficiently.
* Support Managers → Need dashboards/reports for team productivity and case SLAs.
* Customers → Expect quick responses, real-time updates, and transparency.
* Business Owners → Want higher customer satisfaction and reduced service costs.

**3. Business Process Mapping**

Current Process (Manual):  
Customer complaint → Logged in Excel/email → Assigned manually → Delay in updates → Poor tracking.

**Proposed Salesforce Process:**

1. Customer complaint comes via web/email/social.
2. Automatically logged in Salesforce as a Case.
3. Assignment rules send case to the right agent.
4. Customer receives automated acknowledgement (Email/SMS).
5. Agent works on the case and updates progress.
6. Manager tracks performance via Reports & Dashboards.

**4. Industry-Specific Use Case Analysis (E-Commerce)**

* High volume of order tracking requests.
* Frequent return & refund complaints.
* Need for automated customer notifications.
* Real-time agent performance monitoring.

**5. AppExchange Exploration**

To enhance Service Cloud, the company may explore:

* Email-to-Case apps → automatically convert support emails into cases.
* SMS Integration apps (like Twilio) → send customer updates.
* Survey apps → collect feedback after case resolution.