Customer Service Management Project Simulation

Workflow Overview

Stages:
- Ticket Intake: Receiving customer service requests.
- Categorization & Prioritization: Sorting and assigning tickets based on urgency and type.
- Processing & Resolution: Resolving customer issues.
- Review & Validation: Quality assurance and feedback collection.
- Closure: Finalizing and archiving resolved tickets.

Statuses:
- Backlog
- To Do
- In Progress
- Waiting for Customer
- Escalated
- Resolved
- Closed

Issues

1. Ticket Intake (20 Issues)
   - Customer reported login failure.
   - Request to update contact information.
   - Inquiry about recent billing charges.
   - Complaint about product delivery delays.
   - Request for refund due to defective product.
   - Inquiry about warranty terms.
   - Request to reset account password.
   - Complaint about incorrect billing.
   - Customer asked for product replacement.
   - Feedback about poor customer service experience.
   - Request for invoice copy.
   - Inquiry about loyalty program points.
   - Report of unauthorized account access.
   - Request to cancel subscription.
   - Complaint about frequent service outages.
   - Inquiry about service availability in a new location.
   - Request to transfer account ownership.
   - Feedback about new product features.
   - Customer request for expedited service delivery.
   - Report of duplicate charges on credit card.

2. Categorization & Prioritization (20 Issues)

- Categorize customer complaints by urgency.
- Assign "High Priority" to login failures.
- Create labels for subscription cancellations.
- Filter and prioritize refund requests.
- Escalate critical issues to the operations team.
- Assign billing-related issues to the finance team.
- Organize complaints about outages for root cause analysis.
- Tag account access issues for security investigation.
- Create a sub-task for each refund request.
- Assign loyalty point inquiries to the marketing team.
- Prioritize duplicate charge issues as "Critical."
- Create automation rules to auto-assign password reset tasks.
- Generate a report for all "High Priority" tickets.
- Assign unresolved tickets to a queue for follow-up.
- Review escalated issues daily for urgent action.
- Group feedback into actionable insights.
- Identify recurring complaints for pattern analysis.
- Prioritize subscription cancellations during the renewal period.
- Tag complaints about new features for R&D feedback.
- Assign expedited service requests to senior representatives.

3. Processing & Resolution (40 Issues)

- Investigate root cause of login failures.
- Update contact details for requested accounts.
- Issue refunds for defective products.
- Verify billing adjustments with the finance team.
- Resolve password reset requests within 24 hours.
- Investigate unauthorized access reports.
- Process account ownership transfers.
- Arrange product replacements for eligible customers.
- Escalate unresolved outages to the engineering team.
- Confirm warranty terms for customer inquiries.
- Resolve invoice copy requests.
- Validate loyalty point balances for customers.
- Investigate and resolve duplicate charge complaints.
- Process expedited delivery requests.
- Provide detailed responses to warranty-related inquiries.
- Work with logistics to resolve delivery delays.
- Assist customers with subscription cancellation processes.
- Address complaints about frequent outages.
- Resolve billing discrepancies for loyal customers.

- Process product replacement requests in bulk.
- Verify service availability for new locations.
- Provide customers with estimated resolution times.
- Send updates to customers for tickets in "Waiting for Customer."
- Notify customers about status changes for escalated tickets.
- Resolve feedback issues requiring immediate attention.
- Assign follow-up tasks to customer service agents.
- Confirm completion of product replacements.
- Adjust refund processing times for VIP customers.
- Coordinate with third-party vendors for complex issues.
- Analyze outage complaints for long-term solutions.
- Provide proactive updates for critical issues.
- Investigate causes of repeat complaints.
- Collaborate with product teams to resolve feature-related issues.
- Resolve login issues for accounts flagged as inactive.
- Communicate with customers to gather additional details.
- Address recurring subscription-related complaints.
- Provide resolution summaries for resolved tickets.
- Ensure tickets are updated with detailed notes.
- Resolve queries related to account ownership transfers.
- Reassign unresolved tasks to senior agents for closure.

4. Review & Validation (10 Issues)
- Verify the resolution of refund requests.
- Perform quality checks for escalated tickets.
- Review customer feedback on resolved tickets.
- Validate billing adjustments with the finance team.
- Cross-check resolved issues for accurate documentation.
- Conduct root cause analysis for critical complaints.
- Review unresolved tickets for escalation.
- Collect customer satisfaction ratings.
- Validate account updates for accuracy.
- Analyze response times for service improvement.

5. Closure (10 Issues)
- Close tickets resolved successfully.
- Archive resolved tickets for auditing purposes.
- Notify customers of ticket closure.
- Provide follow-up details to customers post-resolution.
- Generate closure reports for management review.
- Mark unresolved tickets as "Closed" after escalation.
- Conduct retrospective meetings for learning.
- Archive escalated tickets separately for analysis.

- Create automation rules to close inactive tickets.
- Document key insights from the project for future improvements.

Automation Rules Recommendations

1. Auto-Assign Tickets
    - Trigger: Issue created.
    - Condition: Summary contains "Password Reset."
    - Action: Assign to the "Support Team."

2. Auto-Close Inactive Tickets
    - Trigger: Status in "Waiting for Customer" for 7 days.
    - Condition: No comments or updates.
    - Action: Transition to "Closed" and notify the customer.

3. Notify Escalations
    - Trigger: Issue transitioned to "Escalated."
    - Action: Send an email to the operations team.

4. Auto-Tag Priority Issues
    - Trigger: Issue created.
    - Condition: Summary contains "Unauthorized Access" or "Duplicate Charge."
    - Action: Add label "Critical" and set Priority to "High."

5. SLA Breach Notifications
    - Trigger: Due date breached.
    - Action: Notify the assigned agent and escalate to the manager.

6. Automated Sub-Task Creation
    - Trigger: Issue created with the type "Refund Request."
    - Action: Create sub-tasks for "Verify Purchase" and "Process Refund."