PHASE 1: Problem Understanding & Industry Analysis

Problem Overview

Modern businesses require a centralized system to capture, manage, and resolve customer issues efficiently. When customer concerns are handled through disconnected channels such as emails, phone calls, and messaging apps, tracking becomes difficult and response times suffer.

Manual ticket assignment often results in uneven workload distribution and delayed resolutions. An intelligent, automated approach ensures that tickets are routed to the most suitable support agent based on urgency and availability.

Additionally, management teams need real-time insights into ticket status, resolution timelines, and agent productivity. Without structured analytics, identifying performance gaps and process bottlenecks becomes challenging.

1. Requirement Gathering

Objective:
To understand operational challenges and define functional requirements for the support system.

Input was collected from key stakeholders including small business owners, support staff, managers, and end customers.

Key Requirements Identified:

- Centralized tracking of customer support tickets with clear statuses such as New, In Progress, Escalated, and Closed.

- Automated assignment of tickets to available support agents based on priority levels.

- Prevention of duplicate ticket handling and overlapping agent assignments.

- Generation of analytical reports and dashboards for operational monitoring.

2. Stakeholder Analysis

Objective:
To identify users involved in the system and understand their roles and expectations.

Internal Stakeholders:

- **Support Agents:** Handle customer issues, update ticket progress, and initiate escalations when required.

- **Support Managers:** Oversee ticket resolution, monitor agent performance, approve escalations, and review analytics.

- **IT / System Administrators:** Configure the platform, manage integrations, and ensure system stability.

External Stakeholders:

- **Customers:** Submit support requests, track ticket status, and provide feedback after resolution.

3. Business Process Mapping

Objective:
To analyze the existing support workflow and identify opportunities for automation and improvement.

Existing Challenges:

- Manual creation and tracking of support requests.

- Lack of a structured escalation or SLA monitoring mechanism.

- Customer communication spread across multiple platforms.

- Limited real-time visibility into ticket progress and resolution efficiency.

Proposed Enhancements:

- A unified platform to manage the complete ticket lifecycle.

- Automated ticket routing and prioritization.

- SLA-based escalation rules for critical issues.

- Integrated customer notifications via email, SMS, or chat.

4. Industry Use Case Analysis

Objective:
To align the solution with industry-specific customer support requirements.

Customer support plays a critical role in customer satisfaction and brand loyalty. Small and medium-sized businesses often struggle to manage support requests due to fragmented communication channels.

Key industry expectations include:

- A centralized system for ticket creation and tracking.

- Automated ticket assignment and escalation mechanisms.

- Real-time notifications to keep customers informed.

- Analytical dashboards to track KPIs such as open vs. closed tickets, SLA adherence, and average resolution time.

5. AppExchange Exploration

Objective:
To evaluate existing Salesforce applications that can enhance or inspire the solution design.

- Reviewed Salesforce AppExchange offerings related to customer support and ticket management.

- Analyzed features available in solutions such as Service Cloud and other support ticketing apps.

- Identified capabilities like centralized case management, intelligent routing, SLA tracking, and reporting dashboards that could be customized or extended in the proposed system.