

Smart SLA Tracker: Intelligent Customer Complaint & Escalation Management

Phase 1: Problem Understanding & Industry Analysis

Problem Statement

Many businesses face challenges in managing customer complaints and adhering to Service Level Agreements (SLAs). Manual SLA tracking often leads to delays, missed escalations, and dissatisfied customers. Without automation, support teams struggle to prioritize cases, ensure timely resolutions, and maintain customer trust. There is a need for a Salesforce-based solution that automates SLA monitoring, complaint handling, and escalations to improve service efficiency and customer satisfaction.

Requirement Gathering

The application needs to:

- Track all customer complaints as Cases with SLA deadlines.
- Automate SLA countdowns and send alerts/reminders before breaches.
- Escalate unresolved complaints to higher support tiers based on SLA rules.
- Provide real-time dashboards and reports for SLA compliance monitoring.
- Enable role-based access for agents, managers, and admins.
- Integrate with email, Slack, or Teams notifications for instant communication.
- (Optional) Leverage AI/Einstein to predict case priority or resolution time.

Stakeholder Analysis

- **Support Agents:** Primary users who resolve customer complaints and receive SLA alerts.
- **Team Leads/Managers:** Monitor SLA performance, handle escalated cases, and review compliance reports.
- **Customers:** Indirect stakeholders who benefit from faster and more reliable complaint resolution.
- **Admin/IT Team:** Configure escalation rules, manage user roles, ensure data integrity, and maintain the system.

Business Process Mapping

1. A customer complaint is logged as a Case in Salesforce.

2. SLA timer is automatically set based on case type and priority.
3. Flows send reminders to the assigned agent as SLA deadlines approach.
4. If SLA is breached, Escalation Rules reassign the case to higher-level support.
5. Managers are notified via email or collaboration tools.
6. Dashboards display SLA compliance rate, resolution times, and escalated case trends.
7. Reports are generated for performance analysis and continuous improvement.

Industry-Specific Use Case Analysis

- Customer Support Centers: Handle high complaint volumes with strict SLAs.
- Telecom & Utilities: Ensure service complaints are resolved within regulated timelines.
- Banking & Insurance: Monitor escalations to avoid compliance risks and penalties.
- IT & SaaS Providers: Improve service desk efficiency and meet contractual SLAs.

AppExchange Exploration

- Explore existing SLA and Case Management apps (e.g., “Case Escalator,” “SLA Manager”).
- Identify gaps such as AI-driven prioritization, custom dashboards, or deeper workflow automation.
- Consider free integrations for messaging (Slack/Teams) or AI-enhanced SLA prediction to extend scope.