CUSTOMER SUPPORT TICKET MANAGEMENT SYSTEM

Phase 1: Problem Understanding & Industry Analysis

Problem Statement

Managing customer support requests is a critical function for organizations, yet many companies continue to rely on emails, spreadsheets, and disconnected tools to handle customer issues. This lack of a centralized support system leads to several challenges:

- **Inefficient workflows:** Support teams spend excessive time manually assigning tickets and tracking issue resolution.

- **Poor customer experience:** Customers do not receive timely updates regarding the status of their support requests.

- **Data silos:** Customer issues, communication history, and resolution details are scattered across emails and manual records.

- **Limited visibility:** Managers lack real-time insights into open tickets, unresolved issues, and support team performance.

- **Operational risks:** Manual handling increases the chances of missed tickets, delayed resolutions, and inconsistent service quality.

There is a strong need for a **centralized customer support ticket management system** that automates ticket handling, ensures transparency, improves response times, and provides actionable insights through reports and dashboards.

Requirement Gathering

The primary requirement of this project is to overcome inefficiencies in traditional customer support processes. The key functional requirements identified include:

- **Centralized Ticket Management:** A single platform to create, track, and manage customer support tickets.

- **Process Automation:** Automated ticket assignment, status updates, escalations, and notifications.

- **Robust Security:** Ensure customer and ticket information is accessible only to authorized users.

- **Actionable Analytics:** Dashboards and reports to monitor ticket trends, resolution times, and agent performance.

- **Scalability:** Ability to handle increasing volumes of customer requests without performance degradation.

Stakeholder Analysis

Four primary stakeholders were identified, each with specific requirements:

- **Customer:** Needs an easy way to raise support requests and track ticket status.

- **Support Agent:** Requires a structured system to view assigned tickets, priorities, and customer details.

- **Support Manager:** Needs visibility into ticket queues, escalations, and agent workload.

- **Organization Leadership:** Requires analytics on customer issues, service efficiency, and overall support performance.

Business Process Mapping

The end-to-end customer support process is mapped as follows:

1. **Ticket Submission:** Customer or support agent creates a ticket with issue details, category, and priority.

2. **Validation & Categorization:** System validates ticket information and categorizes the issue.

3. **Ticket Assignment:** Tickets are automatically assigned to support agents.

4. **Issue Resolution:** Support agents work on the issue and update ticket status.

5. **Escalation:** High-priority or unresolved tickets are escalated to managers.

6. **Ticket Closure:** Issue is resolved and the ticket is closed.

7. **Reporting & Dashboards:** Managers and HR analyze ticket trends, resolution times, and performance metrics.

Industry-specific Use Case Analysis

The project addresses common challenges in customer support operations:

8. **Operational Efficiency:** Automation reduces manual effort in ticket assignment and tracking.

9. **Customer Satisfaction:** Real-time status updates improve transparency and trust.

10. **Agent Productivity:** Organized ticket queues help agents prioritize tasks effectively.

11. **Manager Efficiency:** Dashboards provide visibility into open tickets and support team workload.

12. **Analytics & Insights:** Reports help identify recurring issues and improve service strate

AppExchange Exploration

An analysis of existing customer support and case management solutions on Salesforce AppExchange was conducted. Many solutions were found to be feature-rich but complex and costly. A custom-built Salesforce solution offers:

- Custom workflows tailored to organizational needs.

- Reduced complexity by focusing on essential support functions.

- Flexibility for automation and reporting.

- Cost-effective implementation using Salesforce declarative tools.

This analysis confirms the **feasibility and value** of developing a custom **Customer Support Ticket Management System** as a Salesforce project.