

CASE MANAGEMENT SYSTEM

Problem Statement

In today's competitive business environment, customer satisfaction is a critical factor for the success of organizations in industries such as IT services, e-commerce, telecom, and retail. Companies often struggle with managing and resolving customer issues efficiently due to manual processes, unorganized data, and lack of automation. Key problems include:

1. Delayed Response Times:

- Customer issues are not tracked systematically.
- Agents may overlook or delay responses, leading to frustration.

2. Unassigned or Mismanaged Cases:

- Without automated assignment rules, cases may remain unassigned or handled inconsistently.
- High-priority issues may not reach the appropriate agent promptly.

3. Inefficient Communication:

- Customers are not notified promptly about case updates or escalations.
- Email communication and status updates are often manual, causing errors or delays.

4. Difficulty in Monitoring and Reporting:

- Managers lack real-time visibility into case status, priority, or agent performance.
- Reports are often generated manually, which is time-consuming and error-prone.

5. Inconsistent Business Rules Enforcement:

- Reopening closed cases, escalating unresolved issues, and enforcing service timelines often rely on manual checks.
- This leads to operational inefficiency and inconsistent handling of cases.

Project Objective:

The goal of this project is to develop a **Salesforce Case Management System** that addresses these challenges by:

- Centralizing case tracking and management within Salesforce.
- Automating case assignment, email notifications, and escalations.
- Enforcing business rules such as restricting case reopening beyond a configurable timeframe.
- Enhancing reporting and dashboards for managers to monitor case performance and team efficiency.
- Improving overall customer satisfaction by ensuring timely, consistent, and transparent issue resolution.

Outcome:

By implementing this system, organizations can achieve:

- Faster response and resolution times.
- Reduced manual effort and errors.
- Streamlined support processes with clear accountability.
- Enhanced visibility and actionable insights through dashboards and reports.
- Better customer experience and improved operational efficiency.