

Phase 1: Problem Understanding & Industry Analysis

1. Problem Statement

In many organizations, managing customer issues or service requests is still handled through manual methods such as emails, spreadsheets, or disconnected systems. This creates several challenges:

- Delays in case resolution due to lack of automation and centralized tracking.
- Difficulty in assigning cases to the right support agents based on priority or issue type.
- Inconsistent communication between customers and support teams.
- Lack of visibility for management to monitor service performance and customer satisfaction.

The absence of an integrated case management system leads to inefficiency, slower response times, and decreased customer trust.

2. Objective

To design and implement a **Salesforce-based Case Management System** that helps organizations streamline their customer support operations by:

- Creating and tracking cases efficiently from submission to resolution.
- Automating case assignments based on predefined rules and priorities.
- Sending email alerts and notifications for status updates and escalations.
- Restricting case reopening after resolution using business validation rules.
- Generating insightful reports and dashboards to monitor support performance.

This system aims to improve transparency, efficiency, and overall customer satisfaction.

3. Industry Analysis

Current Practices:

- Many service-based organizations rely on email threads or ticketing spreadsheets.
- Communication with customers is mostly manual and inconsistent.
- Performance monitoring and case history tracking are not streamlined.

Challenges in the Sector:

- Delayed response times due to manual workflows.
- Lack of accountability in tracking issue ownership.
- Difficulty in measuring service performance and customer satisfaction.

Technology Opportunity:

- **Salesforce Service Cloud** provides a powerful platform for implementing automated case management.
- Features like **Assignment Rules, Flows, Email Alerts, Dashboards, and Validation Rules** help automate and monitor processes.
- Salesforce scalability allows integration with AI and chatbots for intelligent case routing and future enhancements.

4. Expected Benefits

- **For Customers:** Faster issue resolution and transparent communication.
- **For Support Agents:** Simplified workflows, automated task management, and reduced manual errors.
- **For Management:** Real-time insights through reports and dashboards for better decision-making.
- **For the Organization:** Improved productivity, higher customer satisfaction, and streamlined support operations.