Business Report

Project Title: UrbanTel Customer Support Workflow Optimization

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Note: *This project was independently conducted with curated analytical support from ChatGPT. The AI was used as a collaborative assistant to simulate real-world Business Analyst mentorship, helping structure the workflow, validate analytical approaches, and refine business communication throughout the project.*

1. Executive Summary

UrbanTel is facing inefficiencies in its customer support workflow, including manual ticket handling, poor SLA management, and a lack of system integration. This BRD outlines the business requirements for a redesigned support workflow that leverages automation, real-time tracking, and intelligent routing to enhance resolution times and customer satisfaction.

2. Business Objectives

Objective	Description
1) Reduce average ticket resolution time	Implement automation and routing logic to reduce time from ticket creation to closure
2) Improve first contact resolution rate	Use historical data and intelligent suggestions to resolve simple cases instantly
3) Enhance transparency for customers	Provide live ticket status updates and proactive communication
4) Improve support agent efficiency	Reduce repetitive tasks through context-aware systems and checklists
5) Enable SLA-driven monitoring	Ensure timely response and resolution through automated SLA tracking
6) Equip leads with real-time analytics	Implement dashboards and reporting tools for team oversight

3. Scope

In Scope:

- Customer support ticket lifecycle (from submission to resolution)
- Routing logic and team assignments
- Integration with CRM system
- Real-time SLA monitoring
- Chatbot deployment for FAQ-level support
- Customer notifications and tracking

Out of Scope:

- Core infrastructure changes
- HR staffing or training initiatives
- System-wide CRM redesign

4. Key Stakeholders

Role	Stakeholder
Project Sponsor	COO
Project Lead	Customer Support Manager
Technical Consultant	IT Operations Lead
End Users	Support Agents, Customers

5. Functional Requirements

ID	Requirement	Priority
FR-001	System must auto-categorize tickets using keywords	High
FR-002	Tickets must be auto-assigned to appropriate teams	High
FR-003	CRM must display previous customer history	High
FR-004	Support agents must receive SLA countdowns on each ticket	High

FR-005	Chatbot must handle FAQ-tier issues and close tickets if resolved	Medium
FR-006	Customers must receive real-time ticket status updates	High
FR-007	Team leads must have access to dashboards with agent KPIs	Medium
FR-008	Ticket escalation must use structured dropdown logic	High
FR-009	Resolution notes must sync back into CRM	High
FR-010	Weekly report generation must be automated	Medium

6. Non-Functional Requirements

ID	Requirement	Type
NFR-001	System response time must be <2 seconds per action	Performance
NFR-002	Platform must be available 99.5% uptime	Reliability
NFR-003	Data must be encrypted in transit and at rest	Security
NFR-004	Solution must comply with GDPR & local regulations	Compliance

7. Assumptions

- CRM platform supports API-based integration
- Support team will adopt the new escalation and checklist workflow
- Chatbot will initially support top 20 common queries
- Stakeholders are aligned on KPIs and reporting metrics

8. Risks & Mitigation

Risk	Likelihood	Mitigation
Low adoption of chatbot	Medium	Train agents to redirect to bot for common queries

Misrouting due to poor keyword setup	High	Iteratively refine routing logic with QA
Data integration delays	Medium	Collaborate with IT early and sandbox test
Change fatigue from agents	High	Communicate benefits and involve agents in design

9. Success Criteria (linked to KPIs)

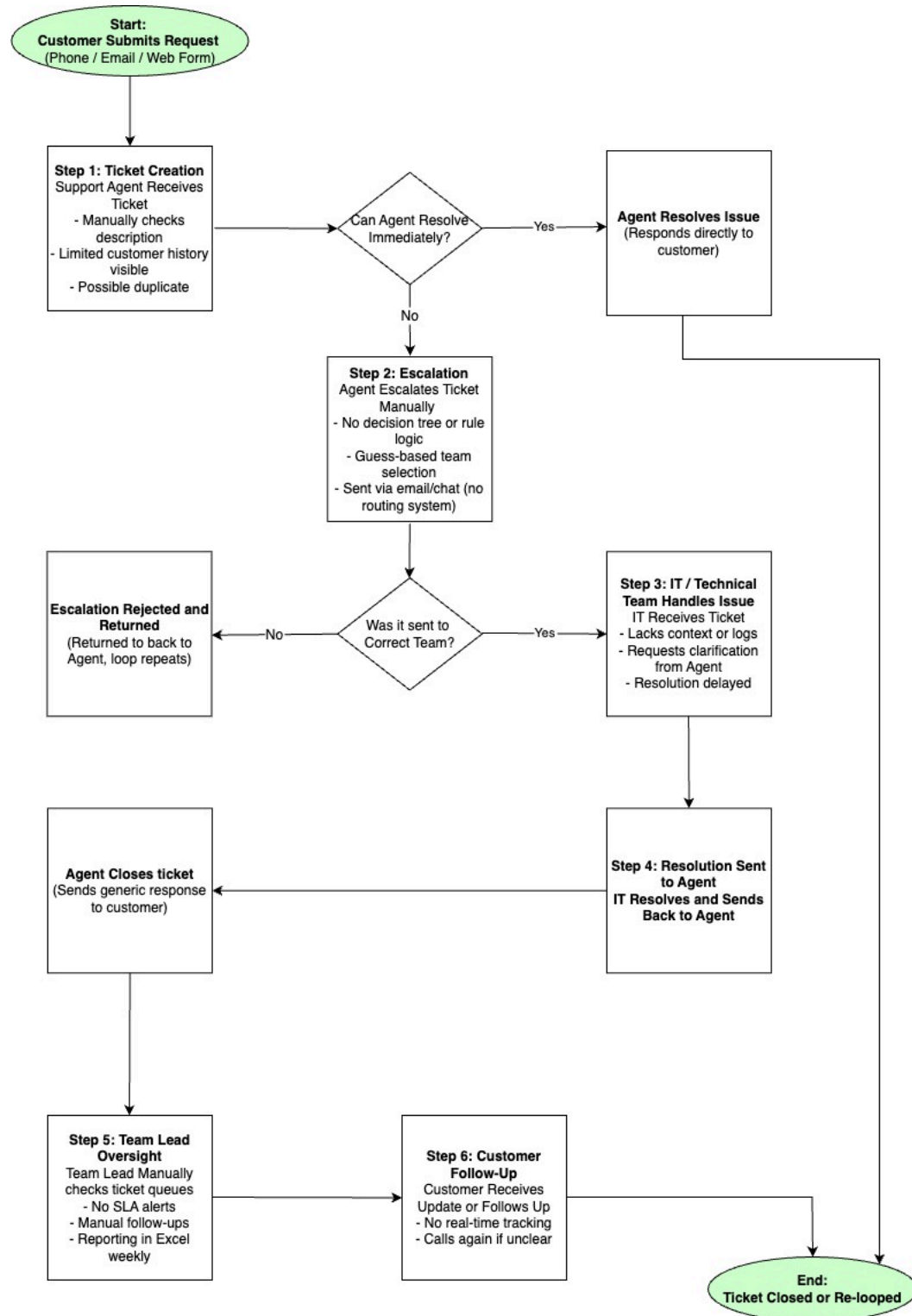| KPI	Target
Average Resolution Time	40% decrease
First Contact Resolution Rate	More or equal to 60%
SLA Breach Rate	Less or equal to 5%
Customer Satisfaction Score (CSAT)	More or equal to 85%
Agent Time on Ticket	30% decrease
Ticket Re-Routing Rate	50% decrease

10. Appendices

- Appendix A: AS-IS and TO-BE Process Diagrams
- Appendix B: Pain Point Summary
- Appendix C: KPI & Success Tracking Model

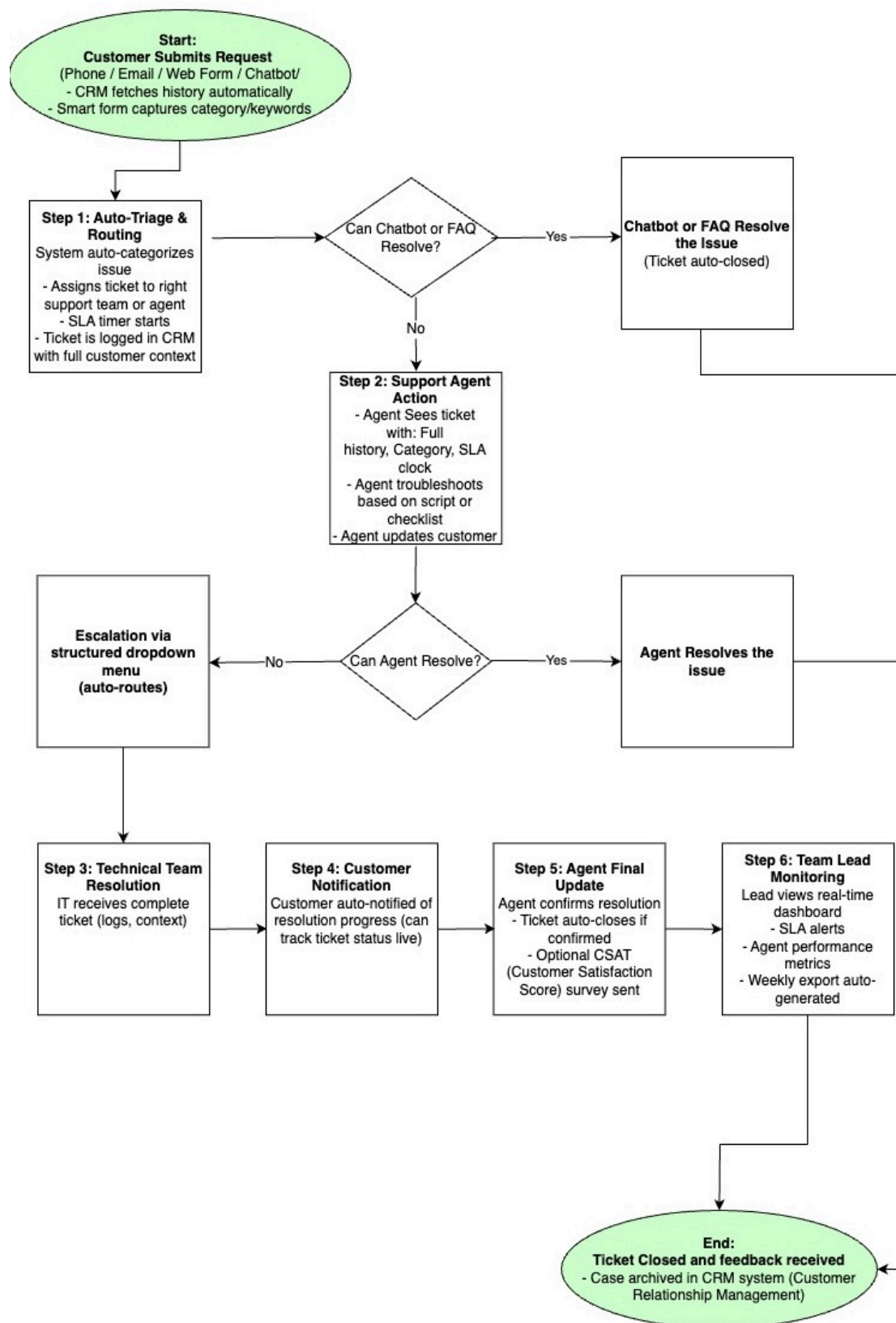# Appendix A: AS-IS and TO-BE Process Diagrams

AS-IS Process Diagrams

Source: Created in draw.io

TO-BE Process Diagrams

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Start:
Customer Submits Request
(Phone / Email / Web Form / Chatbot/
- CRM fetches history automatically
- Smart form captures category/keywords

Step 1: Auto-Triage & Routing
System auto-categorizes issue
- Assigns ticket to right support team or agent
- SLA timer starts
- Ticket is logged in CRM with full customer context

Can Chatbot or FAQ Resolve?

Yes

Chatbot or FAQ Resolve the Issue
(Ticket auto-closed)

No

Step 2: Support Agent Action
- Agent Sees ticket with: Full history, Category, SLA clock
- Agent troubleshoots based on script or checklist
- Agent updates customer

Escalation via structured dropdown menu
(auto-routes)

No

Can Agent Resolve?

Yes

Agent Resolves the issue

Step 3: Technical Team Resolution
IT receives complete ticket (logs, context)

Step 4: Customer Notification
Customer auto-notified of resolution progress (can track ticket status live)

Step 5: Agent Final Update
Agent confirms resolution
- Ticket auto-closes if confirmed
- Optional CSAT (Customer Satisfaction Score) survey sent

Step 6: Team Lead Monitoring
Lead views real-time dashboard
- SLA alerts
- Agent performance metrics
- Weekly export auto-generated

End:
Ticket Closed and feedback received
- Case archived in CRM system (Customer Relationship Management)

Appendix B: Pain Point Summary

Support Agent Perspective

- Tickets are often duplicated due to repeated customer submissions
- Manual escalations frequently go to the wrong department
- No visibility into customer ticket history
- Time wasted waiting for clarification or rerouted cases
- No decision logic or support for escalation flow

Support Team Lead Perspective

- No SLA tracking; agents manually sort and prioritize tickets
- Escalations are inconsistent – agents rely on guesswork
- No checklist or standardized protocol for ticket handling
- Poor ticket status updates make management oversight difficult
- Weekly reporting is manual and time-consuming

IT Operations Lead Perspective

- No dynamic routing or ticket classification in current system
- CRM and ticketing system are not integrated (lack of customer context)
- Lack of automation (e.g., keyword triage, chatbots, rules-based workflows)
- No live dashboard to monitor SLA breaches or ticket flow
- Technical teams lack sufficient context for incoming tickets

Customer Perspective

- Must re-explain issue each time; no visible ticket continuity
- No proactive communication or real-time updates
- Unclear ownership of the case – feels impersonal
- Resolution delays (3-5 days+) and poor transparency
- Follow-ups are reactive and frustrating

Cross-Cutting Issues (Observed Across Stakeholders)

- Lack of automation and intelligent routing

- No standardized workflows or escalation criteria

- Disconnected systems (CRM, ticketing, reporting)

- Manual workarounds increase delays and workload

- Poor communication and visibility for both staff and customers

Appendix C: KPI Tracking Plan

KPI	Definition	Goal	Tracking Method
Average Resolution Time	Total time from ticket creation to closure	40% decrease	SLA timers in system + dashboard
First Contact Resolution (FCR)	% of tickets resolved in first agent interaction	More or equal to 60%	Auto-flag if no escalation
SLA Breach Rate	% of tickets not resolveed within SLA	Less or equal to 5%	Tracked via system alerts
Customer Satisfaction (CSAT)	Average score from post-resolution surveys	More or equal to 85%	Triggered survey after closure
Agent Touch Time	Average minutes agent spends per ticket	30% decrease	Tracked in ticket log
Re-routing Rate	% of escalations that bounce to wrong team	50% decrease	Escalation path audit