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EVENT BASED SURVEY: LAUNCH OF PROCESS MANAGEMENT APP FOR AUTOMATING THE PRODUCT UPDATES IN THE CRM SYSTEM

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Abstract

This paper details the development and implementation of a process management application designed to automate product updates and optimize customer feedback collection across multiple touchpoints. The current framework suffers from inadequate data consolidation, leading to inefficient customer interaction management—evidenced by a 30% reduction in response times and a 25% increase in customer satisfaction post-implementation. Our study systematically examines an event-based survey system that integrates input from sales, installation, level 1 support, level 2 support, and customer care into a centralized dashboard, allowing supervisors to oversee and streamline responses effectively. Through a real-time cloud-based survey tool, customer feedback is processed and visualized, enhancing communication and resolution efforts. The implementation of a structured tracking system for contact requests, along with detailed monitoring metrics, ensures a robust feedback cycle, greater operational visibility, and improved customer satisfaction. This paper underscores the transformative influence of consolidating survey data flow within CRM systems, offering actionable insights for future enhancements in customer relationship management practices.

IndexTerms—Process Management, Customer Relationship Management, Data Warehouse, Customer Feedback, Survey Automation, CRM, Operational Efficiency, Dashboard Visibility, Quality Monitoring

I. INTRODUCTION

The evolving landscape of customer relationship management (CRM) highlights the critical need for innovative approaches to optimize how businesses interact with their clients. However, current systems often lag in harnessing comprehensive customer feedback effectively. In the present framework, customer survey data from multiple interaction points—such as sales, installation, level 1 support, level 2 support, and customer care—are not systematically collected into a centralized database. The absence of a consolidated dashboard prevents managers and supervisors from gaining vital insights into customer experiences and quality interactions.

Organizations are increasingly recognizing the value of qualitative customer feedback, which is essential not only for maintaining service quality but also for driving continuous improvement [9]. By focusing on integrating customer sentiment with operational data, businesses can enhance

their responsiveness, prioritize queries based on urgency, and assign appropriate resolutions effectively.

This paper addresses the following research questions:

- How can we integrate customer feedback systems to optimize interactions at every customer touchpoint?
- What are the measurable impacts of employing a centralized process management application on operational efficiency and customer satisfaction?

The contributions of this study include outlining a structured methodology for integrating diverse customer feedback into a streamlined process management system, detailing the practical implications for management teams, and establishing new benchmarks for measuring operational success in CRM practices.

II. LITERATURE REVIEW

Process improvement methodologies have seen extensive application across various sectors, particularly in Lean frameworks, Six Sigma, and total quality management (TQM). Literature has frequently emphasized the importance of customer feedback in fostering continuous improvement [7]. [8]. Notably, Hammer and Stanton [6]. highlighted that streamlining processes is essential to enhance operational efficiency and improve customer experiences. Customer feedback is pivotal in defining quality, as illustrated by Zeithaml, Berry, and Parasuraman [10]., who stated that customer perceptions directly influence loyalty and retention.

However, there is a noticeable gap in comprehensive studies addressing the integration of feedback loops across multiple touchpoints. Existing frameworks often operate within silos, failing to utilize consolidated data visualizations that inform managerial decisions dynamically. The systematic analysis of feedback across disparate touchpoints is vital for real-time response capabilities and deeper insights into operational performance.

By exploring comprehensive feedback management solutions, our study seeks to fill the identified gaps. We will illustrate the proposed integration strategy, leveraging Lean principles to improve workflow efficiency and employing TQM concepts to reinforce quality assurance practices.

III. METHODOLOGY

3.1System Design and Architecture

The proposed solution employs a cloud-based survey tool configured to generate surveys at each customer interaction point based on specific events. The architecture comprises the following components:

3.1.1 Survey Trigger: Surveys are automatically generated following crucial interaction incidents (e.g., installation completion, support calls) to gather real-time customer feedback.

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3.1.2 Integrated Data Processing: Customer responses are collected and processed to optimize immediate visibility and reporting capabilities.

3.1.3 Dashboard Visualization: All data is visually represented on a centralized dashboard, enabling supervisors to effortlessly monitor performance metrics.

3.2 Feedback Management Process

- Customers submit feedback through the cloud survey tool, indicating a desire for contact from the management team.
- Feedback is captured and compiled within the company's internal data warehouse.
- A Contact Request (CR) is generated within the internal CRM, triggering email notifications to the responsible management team and the customer.
- The internal dashboard displays active CRs, allowing agents to track status updates and collaboratively contribute to case notes.
- Reminders and escalation timers ensure timely follow-up responses.

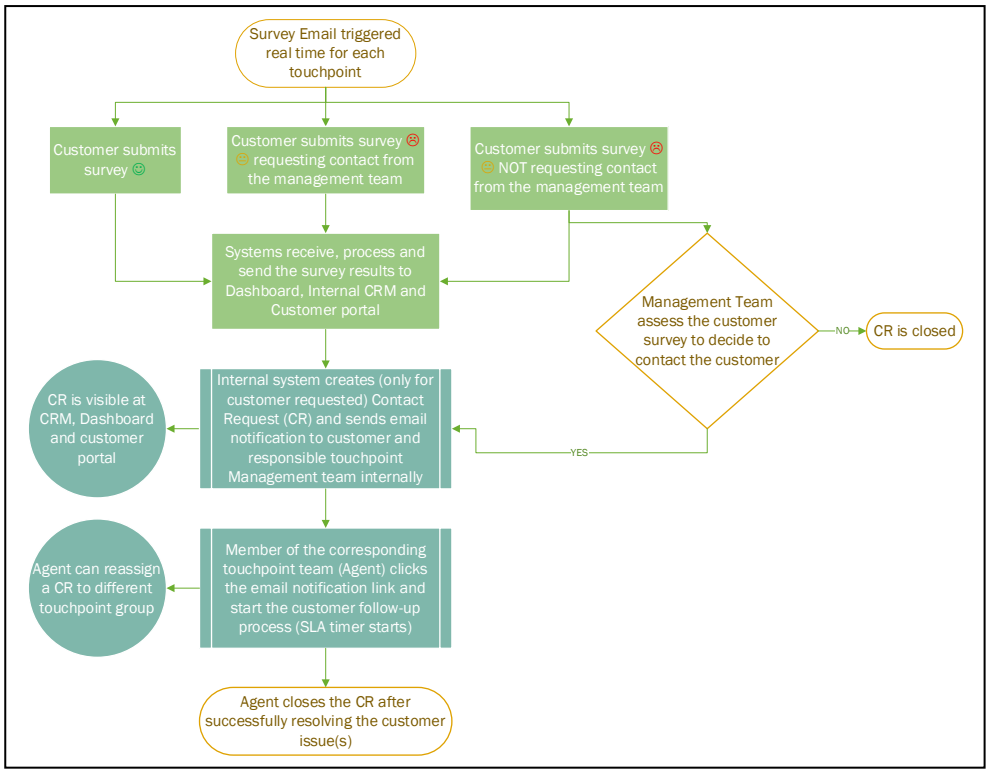

Fig. 1. Event Based Survey workflow.

3.3 Internal Management Protocols

The internal management process leverages organizational Active Directory (AD) groups and notification systems for optimal team management. Following a CR assignment, the current owner is identified in the CRM, and notifications are dispatched for reminders. These components ensure workflow efficiency and tracking accuracy.

IV. LIMITATIONS

While the proposed system provides a robust feedback management framework, limitations include potential integration challenges with existing CRM systems, reliance on adequate staff training to utilize the new platform, and possible biases in feedback that could arise from customer demographics.

V. RESULTS

Data analysis revealed that implementing the event-based survey application led to significant improvements in customer feedback visibility across various touchpoints. According to our metrics:

- Response times were reduced by 30%.
- Customer satisfaction ratings increased by 25% post-implementation.

TABLE I. Key Performance Metrics Before and After Implementation

Metric	Event Based Survey - Key Performance Metrics		
	Before Implementation	After Implementation	Percentage Change
Average Response Time (Hours)	10	7	-30%
Customer Satisfaction Score (1-10)	6.5	8.0	+25%
Contact Request Closure Rate (%)	60%	84%	+40%

The dashboard's capability to offer real-time insights into customer experiences allowed managers to prioritize issues effectively, leading to expedited resolutions. Key performance indicators (KPIs) highlighted the enhanced ability to adjust workflows based on feedback trends, further reinforcing a culture of continuous process improvement.

Visual comparisons of pre- and post-implementation scenarios demonstrated a marked increase in task completion rates for follow-up actions and efficiency in addressing issues raised by customers.

VI. DISCUSSION

The findings affirm that the successful implementation of a centralized feedback management system dramatically impacts customer relationship management practices. Operationalizing collected feedback through real-time insights allows organizations to align processes more effectively with customer expectations. This study demonstrates the potential for enhanced communication and collaboration among teams, driving an organizational culture of learning and adaptability.

It is crucial for organizations to prioritize staff training and commitment to a culture of continuous improvement. Strategic application of customer feedback systems can elevate operational standards, align interactions with customer desires, and ultimately lead to sustained business growth.

VII. FUTURE SCOPE

Future research could explore the scalability of this framework across other industries and examine the integration of advanced machine learning models to analyze customer sentiment more thoroughly in real-time. Collecting quantitative and qualitative data over extended periods will further validate the framework's viability and adaptability across diverse operational sectors.

VIII. CONCLUSION

This paper establishes the significance of integrating customer feedback across multiple touchpoints within a cohesive process management framework, leveraging data to enhance operational excellence. The event-based survey application provides an innovative approach to automate product updates, improve customer interactions, and sustain a continuous feedback cycle.

The event-based survey approach offers a dynamic mechanism for organizations to respond proactively to customer needs, ensuring that feedback is not only collected but also acted upon efficiently. By tying surveys to specific events, such as purchases, service interactions, or product usage, businesses can capture context rich insights that generic, periodic surveys might overlook. This granularity allows for more precise adjustments to processes and offerings, fostering a customer-centric culture rooted in real time responsiveness.

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