

CASE STUDY

Customer Support Workflow

Illustrative Sample Case Study

This case study illustrates how STRIVE helped a growing business improve its customer support workflow through better ticket organization, faster response handling, clearer follow-up processes, and more structured reporting.



INDUSTRY
E-commerce &
Service Business



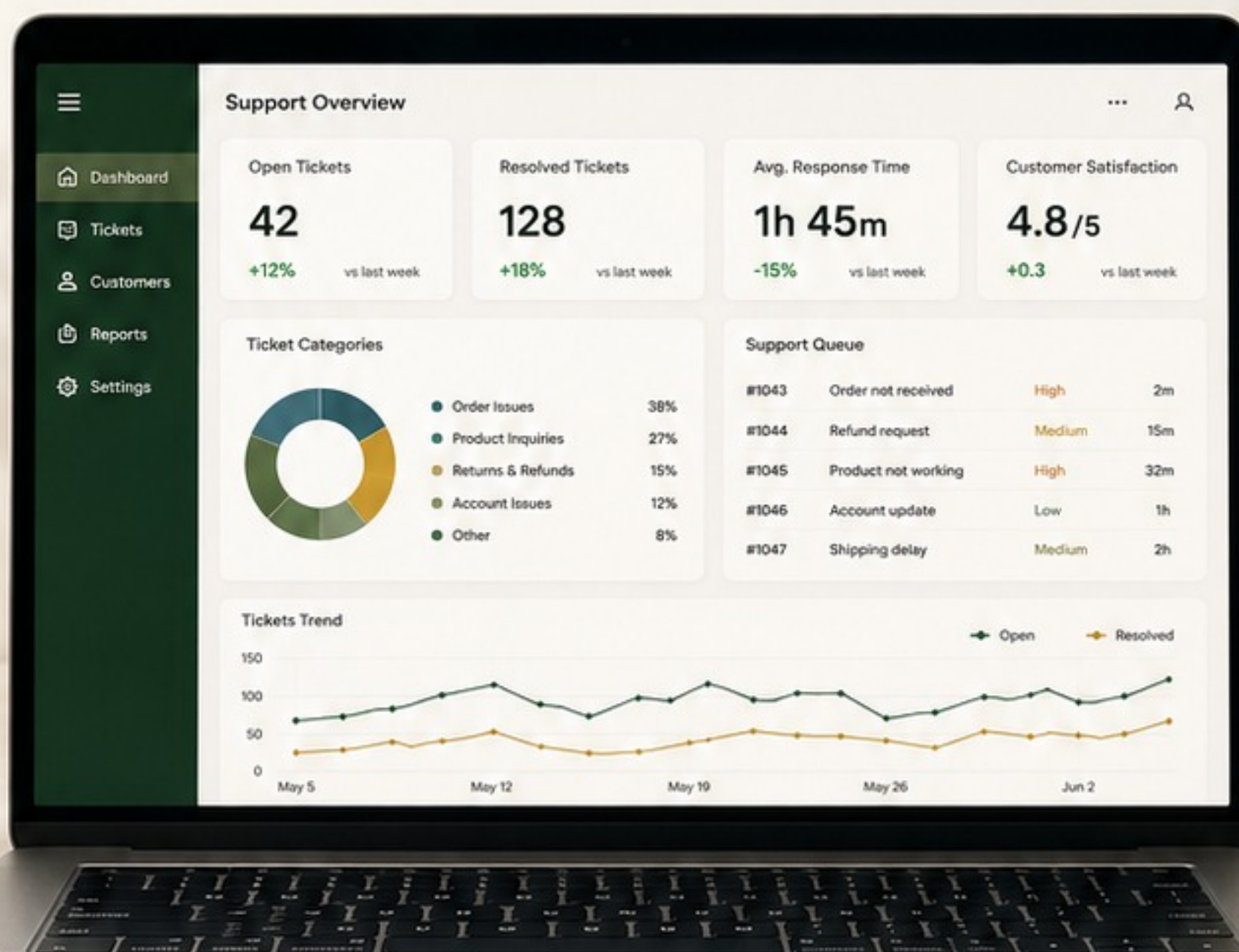
SERVICE
Customer Support
Workflow



TIMELINE
4 Weeks



TOOLS
CRM, Google Sheets,
Gmail, Helpdesk,
WhatsApp



CASE STUDY

Client Overview

Business context at a glance

STRIVE's client is a growing e-commerce and service-focused business handling customer questions across email, chat, and WhatsApp. As ticket volume increased, the business needed a more dependable support workflow to improve response time, team coordination, and customer experience.



BUSINESS TYPE

E-commerce & Customer Service



SUPPORT CHANNELS

Email, Chat, WhatsApp, Calls



AVERAGE TICKET VOLUME

35–50 tickets per day



MAIN SUPPORT AREA

Ticket management, follow-ups, status updates



REPORT FREQUENCY

Daily queue review and weekly reporting



DECISION FOCUS

Response speed, issue resolution, customer satisfaction



The client needed a *structured support workflow* to turn scattered communication into organized, trackable customer service operations.

CASE STUDY

Client Challenge

What needed to improve

Before partnering with STRIVE, the client's customer support process was inconsistent, hard to review, and too dependent on manual follow-up. Important requests were not always tracked in a clear and timely way.

1



TICKETS WERE SCATTERED

Messages were spread across email, chat, and WhatsApp.

Email	27
Live Chat	15
WhatsApp	18

2



RESPONSES TOOK TOO LONG

Manual checking delayed replies and follow-ups.

May 2025							Pending Replies
S	M	T	W	T	F	S	
		6	7				23
		13	14				
		20	21				
		27	28				
Avg. Delay							18h 40m

3



STATUS TRACKING WAS INCONSISTENT

Different formats caused confusion.

Ticket ID	Status	Owner
#1042	Open	John
#1043	In Progress	Sara
1044	working on it	Mike
Ticket-1045	Pending	—
001046	Resolved	John

4



PRIORITIES WERE UNCLEAR

Urgent issues were not flagged consistently.

#1012	Website down
#1013	Refund request
#1014	Payment issue
#1015	Login not working
#1016	Feature request

5

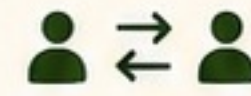


REPORTING WAS LIMITED

Management lacked a clear daily overview.

Total Tickets	Open Tickets	Resolved
—	—	—
Avg. Response Time	Backlog	
—	—	
No consolidated overview		

6



SALES & SUPPORT HANDOFF WAS WEAK

Customer context was sometimes missed.



THE IMPACT:

These workflow gaps reduced response efficiency, slowed resolution, and made support operations harder to manage confidently.



CASE STUDY

Goals & Priorities

What needed to improve

The goal was to build a dependable Excel dashboard automation system that improves reporting speed, KPI clarity, and management visibility—so the business can review performance with confidence.



1. BUILD A STRUCTURED DASHBOARD FLOW

Design a clear, logical flow from raw data to meaningful insights.



2. AUTOMATE KPI CALCULATIONS

Use formulas and logic to automatically calculate key metrics accurately.



3. ORGANIZE SOURCE DATA

Consolidate and clean data for consistency, accuracy, and reliability.



4. IMPROVE MONTHLY COMPARISONS

Enable side-by-side and trend analysis for better decision-making.



5. MAKE REPORTING EASIER TO REVIEW

Present insights clearly with visuals that are easy to understand.



6. REDUCE MANUAL REPORTING TIME

Minimize repetitive tasks so the team can focus on growth, not formatting.

PRIORITY MATRIX



PRIORITY FOCUS CHECKLIST

INITIATIVE	PRIORITY
Build a structured dashboard flow	High
Automate KPI calculations	High
Organize source data	High
Improve monthly comparisons	Medium
Make reporting easier to review	Medium
Reduce manual reporting time	Low

“Clear reporting goals lead to better systems, faster review, and measurable growth.”



CASE STUDY

STRIVE Solution

How the workflow was improved

STRIVE designed a practical customer support workflow focused on organized ticket handling, faster response actions, clearer ownership, and structured reporting—so every customer request became easier to manage and review.

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1 CHANNEL CONSOLIDATION
combined support requests into one structured system.
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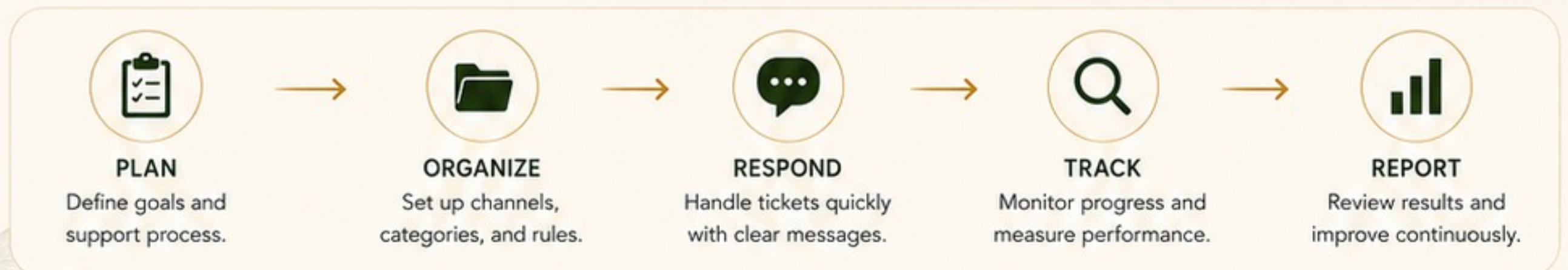
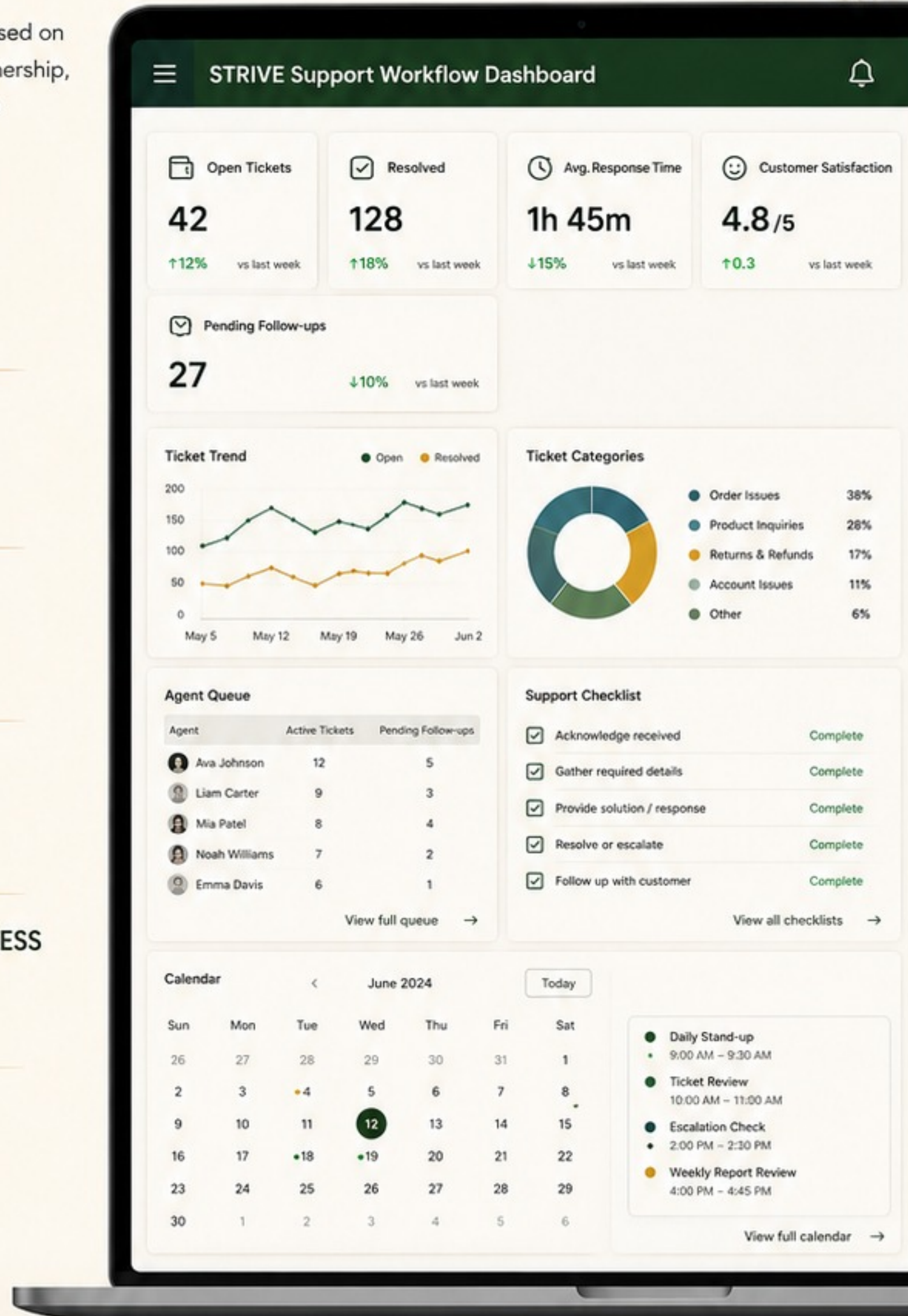
2 TICKET STATUS FLOW
defined stages for new, ongoing, waiting, and resolved cases.
- 

3 PRIORITY TAGGING
added high, medium, and low priority handling.
- 

4 RESPONSE TEMPLATE SETUP
prepared clear message templates for common issues.
- 

5 ESCALATION & FOLLOW-UP PROCESS
created repeatable steps for pending and urgent issues.
- 

6 REPORTING & HANDOVER
built review reports and team usage guidance.



CASE STUDY

Work Process

From requirement to final delivery

At STRIVE, we follow a structured and transparent process to ensure every customer support workflow we design is organized, practical, and ready for day-to-day operations.



STRIVE ensures a seamless support workflow process—
from scattered communication to organized service operations.



STAY INFORMED

clear visibility into queue status and follow-ups.



IMPROVE CONSISTENCY

repeatable support actions reduce missed tasks.



ENSURE USABLE OUTPUTS

trackers and dashboards are simple, practical, and ready to use.

CASE STUDY

Deliverables

Project outputs

All outputs were delivered in a clear, organized, and client-ready format—making customer support easier to review, manage, and improve.

01 SUPPORT TRACKER

ticket ID, channel, customer, issue type, status, owner.

Support Tracker					
Ticket ID	Channel	Customer	Issue Type	Status	Owner
#1042	Email	Sarah Johnson	Order Issue	Open	Mia R.
#1043	WhatsApp	James Lee	Refund Request	In Progress	Alex T.
#1044	Helpdesk	Priya Patel	Account Access	Pending	Nina K.
#1045	Gmail	Michael Brown	Product Question	Resolved	Leo S.
#1046	Website	Emily Davis	Shipping Delay	Closed	Mia R.

02 DAILY QUEUE DASHBOARD

open tickets, pending follow-ups, urgent cases, response time.



03 RESPONSE TEMPLATE LIBRARY

common reply templates for order issues, refunds, account help, and product questions.

Template Library	
Order Issues	12 templates
Refunds & Returns	10 templates
Account Help	9 templates
Product Questions	11 templates

Order Delay - Apology

Hi (Customer Name),

We're sorry to hear that your order is delayed. We're working on it and will keep you updated shortly.

Thank you for your patience!

Best regards,
(Company Name)

[Use Template](#)

04 ESCALATION MATRIX

when and how issues should be escalated.

Escalation Matrix			
Issue Type	Trigger / Condition	Escalate To	SLA
Billing Dispute	Refund amount > \$100	Finance Team	24h
Technical Issue	System error or bug affecting users	Tech Support Lead	12h
VIP Customer Complaint	VIP customer unhappy or repeated issues	Account Manager	12h
Legal / Compliance	Terms violation or legal concern	Compliance Team	4h

05 WEEKLY SUPPORT REPORT

ticket volume, resolution count, satisfaction trend, top issue categories.



06 HANDOVER NOTES

workflow guidance, update instructions, and checklist.

Handover Notes	
Workflow Guidance - Review tickets in the Daily Queue. - Respond using templates from the Template Library. - Update ticket status after each action. - Escalate based on the Escalation Matrix. - Follow up pending tickets daily.	Update Instructions - Log in to the support system. - Check and update ticket status. - Add internal notes if needed. - Attach relevant files. - Save and move to next ticket.
Handover Checklist ☐ All data files updated ☐ Templates reviewed ☐ Escalation rules confirmed ☐ Access handed over	



Handed Over with Care. Ready for Better Support.
Every file is structured, verified, and ready for business use.

CASE STUDY

Before & After

How the process changed

Before STRIVE, support handling was manual and scattered. After implementation, the workflow became more organized, faster to review, and easier to manage.



The transformation from scattered customer communication to a structured support workflow gave the business better clarity, faster service, and more confident follow-up management.

Your Goals. Our Support. Great Results.

Illustrative sample for portfolio presentation.
Client details have been changed for privacy.

CASE STUDY

Business Outcomes

Results demonstrated by this illustrative project

The customer support workflow system delivered meaningful improvements across response speed, issue visibility, follow-up consistency, and overall service organization.



1. FASTER RESPONSE TIME

Reduced average response time through better ticket triage, automation, and clear task prioritization.



2. BETTER FOLLOW-UP TRACKING

Real-time reminders and status updates ensure no request is missed and every customer receives timely follow-up.



3. CLEARER TICKET VISIBILITY

Centralized dashboards provide full visibility into ticket status, priorities, and progress at every stage.



4. STRONGER TEAM COORDINATION

Defined roles, assignments, and internal notes improve collaboration and reduce confusion.



5. IMPROVED CUSTOMER EXPERIENCE

Faster resolutions, consistent communication, and reliable follow-ups lead to happier and more loyal customers.



6. PROFESSIONAL SUPPORT REPORTING

Data-driven reports help track performance, measure impact, and guide smarter operational decisions.



SUMMARY

This support model helped the client stay focused on customer experience while support operations remained organized, efficient, and dependable.





STRIVE

FREELANCING AGENCY

Precision Planning, Measurable Growth

CASE STUDY

Need a Similar Solution?

Let's build an Excel dashboard system that works for you

Every business has unique reporting needs. STRIVE designs tailored Excel dashboard solutions that organize data, improve KPI visibility, and help teams focus on smarter decisions.



Verified client feedback will be added after publication approval. No placeholder testimonial is used.

READY TO TRANSFORM YOUR REPORTING WORKFLOW?



1
Share your reporting problem



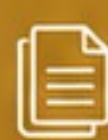
2
We assess and recommend the best dashboard plan



3
Focus on business decisions while we handle reporting structure



START YOUR PROJECT



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At STRIVE, your success is our mission. Your Goals. Our Support. Great Results.



Note: Illustrative sample for portfolio presentation. Client details have been changed for privacy.