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An Enhanced Customer Management and Scheduling System

NWOZOR, B. U.[1,*], *AKAWE, B. G.*[1]

[1]*Department of Computer Science, Federal University of Petroleum Resources, Effurun Delta State*

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ABSTRACT

This study introduces an enhanced customer management and scheduling system aimed at improving task assignment for handling customer queries, follow-ups, and standby duties. Traditional scheduling methods often struggle in dynamic environments where query volumes, priorities, and resource availability change frequently. These challenges lead to poor customer satisfaction, inefficient resource use, and delayed responses. The problem's combinatorial nature, classified as NP-hard, makes it computationally difficult to find optimal schedules, especially as task complexity increases. To address these issues, the Agile Software Development Methodology was adopted to design and implement a flexible and efficient scheduling system. The system adapts to changing conditions and optimizes personnel allocation for customer service tasks, ensuring better responsiveness and resource utilization. The results of the implementation showed remarkable improvements across key performance areas. Portability increased by 35%, ease of use and user experience improved by 45%, and accessibility was enhanced by 50%. Operational costs were reduced by 60%, while customer access time improved by 70%. Appointment scheduling time was reduced by 65%, and data security was strengthened by 50%. These improvements demonstrate the system's effectiveness in delivering a more reliable, user-friendly, and cost-efficient solution for managing customer interactions and scheduling tasks in dynamic environment.

1. INTRODUCTION

The Scheduling and customer management involves assigning personnel to various tasks, such as solving customer's queries, follow-up activities, and standby duties. This problem integrates scheduling and routing complexities, making it a challenging NP-hard problem (Mao et al, 2017). NP-hard problems are those for which finding the best expert to solving a customer problem in a reasonable timeframe is extremely difficult, particularly as the scale of the problem grows. In real-world scenarios, the challenge escalates significantly when managing tens or hundreds of customers across multiple locations and queries and complaints are done by these customers (Halmetoja et al, 2019). The complexity is further amplified when the number of customers rises into the hundreds or thousands, requiring efficient allocation of personnel to a diverse range of tasks. Solutions to this issue must balance time constraints, resource limitations, and workforce availability to ensure all customers queries or complaints are completed effectively. Resource scarcity remains one of the most common challenges hindering

*Corresponding author, e-mail: nwozor.blessing@fupre.edu.ng, akaweblessing1@gmail.com
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corporate development on a global scale. Organizations often operate under limited human resources, financial constraints, or technological tools, intensifying scheduling and routing challenges. Poor allocation can result in inefficiencies, higher costs, and underutilization of personnel (Utung et al, 2020). To address this, businesses require robust solutions typically through best algorithms or artificial intelligence that can improve decision-making processes, reduce overhead, and maximize productivity. By efficiently managing schedules and routes, businesses can enhance customer's satisfaction utilization and overcome the bottlenecks caused by resource limitations, ultimately driving corporate growth and operational efficiency. Optimal customer scheduling, particularly in relation to research performance, is essential for enhancing customer satisfaction and driving business growth (Dwivedi et al, 2019). This study was conducted to demonstrate how effective scheduling strategies can significantly improve the quality of customer service while simultaneously fostering business development. By implementing optimal scheduling, businesses can streamline operations, reduce delays, and allocate resources more efficiently, ultimately delivering better experiences to customers. Utilizing advanced technology and innovative strategies is pivotal in achieving these goals. Digital tools such as scheduling software, artificial intelligence, and data-driven analytics play a critical role in improving business performance and enhancing customer support systems. These technologies enable businesses to respond to customer demands more effectively, personalize services, and maintain a competitive edge in the market. Aligning such efforts with current trends allows organizations to adapt to rapidly changing customer expectations and industry dynamics. In this era of increased competition and digital transformation, businesses face new responsibilities. Experts and professionals are tasked with solving customer-related problems efficiently while balancing the ongoing competitive changes in the business environment. As markets become more dynamic, customer satisfaction remains a key determinant of success. Meeting this demand requires not only optimizing scheduling practices but also fostering innovation and continuous improvement in customer service delivery. This study underscores the importance of adopting forward-thinking strategies that address both operational efficiency and customer satisfaction. By leveraging technology and prioritizing customer needs, businesses can achieve sustainable growth, strengthen customer relationships, and remain resilient in the face of competition. A schedule is a structured plan that specifies when activities or events are intended to occur. It provides a framework for organizing tasks to achieve the best possible outcomes. Scheduling involves allocating limited resources to tasks to optimize specific objectives (Naha et al, 2019). In all scheduling problems, the number of jobs and machines is typically finite, and various parameters can be controlled to improve results. Darwin's 1929 theory suggests that individuals adapt to their environment to survive the process of evolution. Traits that enhance competitiveness are preserved through reproduction, while weaker characteristics are eliminated over time. Genes, the basic units of inheritance, control dominant traits and form sets called chromosomes. Over successive generations, stronger individuals and their advantageous genes are passed on through recombination, a process known as crossover. This natural selection mechanism inspired the development of Genetic Algorithms (GAs).

These algorithms simulate evolutionary processes using computers to solve optimization problems. By mimicking biological evolution, GAs identify optimal solutions by combining and improving on the "fittest" solutions across iterations (Aman, 2012).

A customer management system is a vital component of any business, as it helps streamline interactions and improve overall customer satisfaction. Incorporating machine learning algorithms into such systems enhances their efficiency, particularly when managing customer queries and resolving problems. These algorithms can analyze incoming queries, prioritize tasks, and schedule responses based on urgency and complexity, ensuring timely and effective customer support.

One of the most effective approaches to optimizing task scheduling in this context is the use of Genetic Algorithms (GAs). GAs are inspired by the principles of natural selection and evolution, making them particularly suited for solving complex optimization problems. By simulating the process of evolution, GAs iteratively improve solutions, identifying the most effective ways to allocate resources and handle customer issues (Zhang et al, 2017). For a growing business, adopting machine learning and GAs in customer management systems offers significant advantages. These tools enhance productivity by automating repetitive tasks, allowing employees to focus on more strategic responsibilities. Also, they improve the customer experience by ensuring prompt responses and tailored solutions to individual concerns. Implementing such advanced technologies optimizes task management and contributes to the long-term success of the business, fostering stronger customer relationships and driving sustainable growth. Research on the theory and application of scheduling has been a focal point for many years, given its significance across various industries. The study of scheduling contains both theoretical and practical aspects, with the primary goal being the development of optimal schedules under specific constraints. Theoretical scheduling problems aim to identify the best possible sequences for tasks or jobs while adhering to resource limitations, time constraints, or other parameters. To address these challenges, researchers have employed various techniques such as branch-and-bound and dynamic programming. These methods systematically explore potential solutions, eliminating suboptimal options and focusing on those most likely to yield optimal results (Ana et al, 2022). Branch-and-bound breaks down problems into smaller sub problems, discarding branches that do not meet the required criteria. Dynamic programming, on the other hand, solves problems by breaking them into simpler overlapping sub problems and storing intermediate results to avoid redundant computations. From a combinatorial optimization perspective, sequencing and scheduling jobs in dynamic and unpredictable environments present considerable complexity. Such problems involve numerous variables and interdependencies, making them computationally challenging. This level of complexity is categorized as NP-hard, meaning that no known algorithm can efficiently solve these problems for all possible cases within a reasonable time frame. The continued study of scheduling theory and practice is important, as solving these problems can lead to improved resource allocation, enhanced productivity, and better decision-making in dynamic systems, ranging from manufacturing to service industries (Penedo, 2001).

2. LITERATURE REVIEW

Businesses have long relied on technology to enhance efficiency and optimize resource utilization (Al-Fugaha et at, 2015). Whether for small-scale or large-scale operations, automation processes have become essential over time. Tools such as Windows Scheduler or scheduling software are often associated with the term "efficiency," and for good reason (Armbrust et all, 2010). However, experts frequently emphasize that scheduling is a form of automation that goes beyond mere efficiency, playing a critical role in streamlining operations and improving overall productivity. Scheduling dates back to 1956/57 when Kelly and Walker developed the Critical Path Analysis algorithm, marking the beginning of modern scheduling methods. This algorithm was designed to manage and schedule a series of project activities. Years later, in 1980, the first commercial scheduling software, Micro Planner, was introduced, further advancing scheduling capabilities. The launch of the first Windows Scheduler in 1985 revolutionized scheduling once again, solidifying its role as an essential tool for managing tasks and projects efficiently. A scheduling system is a tool or software used to organize tasks, manage resources, and set appointments to make better use of time. It includes various methods and strategies to help complete activities on time, whether in a business, organization, or personal setting. These systems are built to handle complex situations, like managing staff availability, resource limits, and deadlines. The main goal of a scheduling system is to distribute tasks efficiently, avoiding conflicts and making operations smoother (Liu et at, 2022). In a work environment, this might involve scheduling shifts for employees, booking appointments for service providers, or setting project timelines for managers. The system helps find open time slots, prevents double-booking, and prioritizes tasks based on certain criteria (Yang et at, 2023). In today's digital world, scheduling systems have become more advanced, often using artificial intelligence and machine learning to improve decision-making. These systems offer reminders, updates, and insights to everyone involved, boosting communication and productivity. They can also be customized for specific industries like healthcare, hospitality, or education, addressing their unique scheduling needs. In our fast-paced society, success often depends on effective time management. This is where a modern scheduling system can make a big difference for businesses and individuals. Adopting such technology not only ensures accurate time allocation but also brings a level of efficiency that was hard to achieve before. Examining its impact shows how it changes the way daily operations are run. The strength of today's scheduling systems lies in their flexibility and adaptability. Whether it's assigning shifts in a round-the-clock call center, coordinating international virtual meetings, or setting deadlines for complex projects, these systems handle the logistical challenges. Integrating a scheduling system into an organization's routine not only saves time but also reduces the risk of human error. The benefits of using an advanced scheduling system go beyond just operational tasks. They also contribute to strategic planning, where data-driven insights help in future planning and resource management. This highlights the importance of scheduling systems for those aiming to stay competitive.

2.1 Customer Management System (CMS)

A Customer Management System (CMS) is a powerful software program designed to help companies store and analyse customer-related data as well as manage their

relationships with customers (Wan et al, 2016). These systems are made to consolidate client data into a single database, which improves organisation and accessibility (Gill et al, 2022). Through the automation of numerous important procedures like monitoring client enquiries, overseeing sales funnels, and examining purchasing patterns a CMS helps companies to function more effectively, minimize human labour, and enhance decision-making. Adopting a CMS has a number of important advantages. By providing timely and individualised answers to questions and concerns, businesses may increase customer satisfaction (Himanshu et al, 2023). CMS helps in removing duplications and establishing more efficient workflows for duties like data entry, follow-ups, and reporting, these systems are essential for optimising operations. Organisations can concentrate on initiatives to increase profitability and maintain competitive advantages with increased efficiency and better consumer insights. Prominent CMS platforms that demonstrate the revolutionary potential of these systems are Salesforce, Zoho CRM, and HubSpot CRM. Contact management, marketing automation, and analytics are just a few of the services that these platforms provide, enabling companies to improve their approaches to client interaction. Businesses can anticipate demands, better understand client preferences, and build deeper, more meaningful relationships by utilising these tools. In the end, a CMS is a strategic asset as well as a technology investment. By bridging the gap between companies and their clients, it promotes trust and loyalty while accelerating financial development and operational excellence. Below are some prominent Customer Management Systems

3. METHODOLOGY

In this study, the Agile Software Development Methodology has been employed for the design and implementation of an Optimizing Scheduling in Customer Management System based on Genetic Algorithm that is aimed to helping customer and ensure customer satisfaction is obtained. The Agile Development Methodology is combined with an Object-Oriented Approach, and the system is built using C#, ASP.NET and SQL technologies. Agile emphasizes iterative development, continuous feedback, and collaboration, making it suitable for projects requiring flexibility and frequent updates. This approach facilitates faster delivery of value, improved quality, predictability, and an enhanced ability to respond to change (Schwaber et al., 2022). Two widely used Agile methodologies, Scrum and Kanban, are popular frameworks for project management in software development. This dissertation adopts the Scrum framework due to its structured yet flexible approach to handling complex projects. Scrum is a subset of Agile, characterized by its well-defined roles, distinct artefacts, and time-boxed events designed to foster collaboration and continuous improvement. Scrum organizes work into iterations called sprints, which typically last two to four weeks. Each sprint begins with a planning session to define the goals and deliverables and concludes with a review and retrospective to assess outcomes and identify areas for improvement. Key roles in Scrum include the Product Owner**,** responsible for prioritizing tasks based on business value; the Scrum Master**,** who facilitates the process and removes obstacles; and the Development Team**,** which executes the work. Artifacts such as the Product Backlog**,** Sprint Backlog**,** and Increment are integral to Scrum, as they provide transparency and track progress. Time-boxed

activities like daily stand-ups ensure consistent communication and alignment among team members. By embracing iterative and incremental practices, Scrum allows teams to deliver functional products at the end of each sprint, adapt to changing requirements, and maintain high productivity. This dissertation leverages the Scrum framework for its ability to manage dynamic and evolving requirements effectively, ensuring that project goals are met with flexibility and precision.

3.1 Analysis of the Proposed System

The proposed system focuses on transforming the current, mostly manual customer management approach into a fully optimized, technology-driven platform aimed at improving efficiency, service delivery, and overall customer satisfaction.

The new system will centralize customer data, ensuring that all interactions, service histories, feedback, and personal details are easily accessible in one secure database. This will eliminate the data fragmentation and inconsistencies experienced with the existing system, leading to better organization and faster information retrieval. By introducing automation for routine tasks such as responding to inquiries, updating records, scheduling follow-ups, and generating reports — the system significantly reduces manual workload. This will allow staff to focus on more strategic and customer-focused activities, thereby boosting productivity and enhancing the quality of service.

Integrated communication features will ensure that customers can engage seamlessly through various channels such as email, chatbots, and direct messaging. It also offers personalized communication, based on the customer's interaction history, which strengthens customer relationships and loyalty.

Furthermore, the proposed system will provide real-time analytics and reporting tools. These tools will enable management to track customer behavior, service performance, and satisfaction levels, allowing for data-driven decision-making and continuous improvement strategies. The optimized system is also scalable, meaning it can grow alongside the organization without requiring complete overhauls. As customer bases expand, the system will support new functionalities and higher volumes of customer interactions effortlessly. Also enhancing security features such as data encryption, user authentication, and secure cloud storage, the system ensures customer information remains protected, boosting trust and compliance with data standard. Figure 1 shows System Design Architecture, while Figure 2 shows the flowchart.

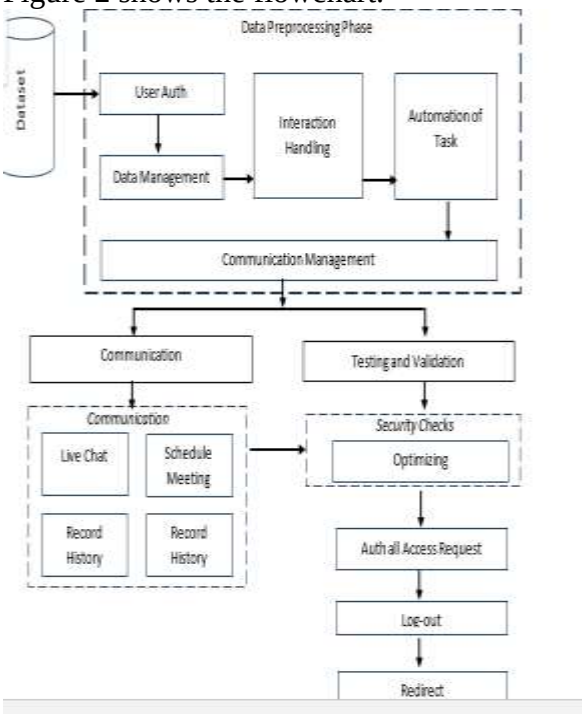

Figure 1: System Design Architecture

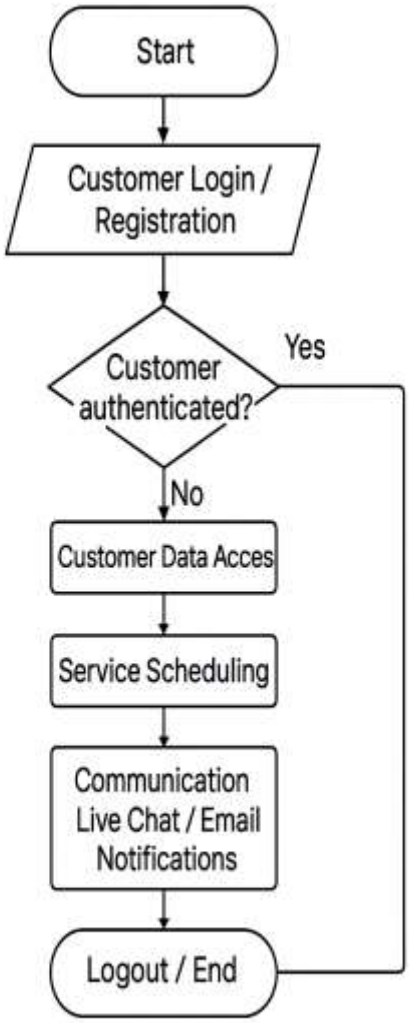

Figure 2: Flowchart

4. RESULTS AND DISCUSSION

It involves the coordination of various components to ensure not only functionality but also efficiency and success (Ekanem, 2014). This chapter presents the implementation of the demo system, developed based on the design and methodology outlined in the previous chapter. The implementation process includes structured activities such as setting up the necessary hardware and software, configuring the system according to specified requirements, and integrating core modules to ensure smooth and responsive operations. The primary objective is to enable the system to manage customer records efficiently and automate scheduling processes for improved service delivery.

System implementation translates conceptual and logical models into a functional application. Major activities include selecting suitable programming tools, writing and debugging code, conducting system testing, and producing adequate documentation. In this project, Visual Studio Code was adopted as the integrated development environment, and the software was implemented using Python as the primary language.

For managing and organising customer data, the Pandas library was used to structure, sort, and preprocess datasets for optimal performance. The backend was built using Django, a robust Python web framework, to support scalability, security, and modular integration. The system adheres to the Model-View-Controller (MVC) architectural pattern, ensuring that each component remains maintainable and separated.

The application runs effectively on a local server and conforms to the architectural plan defined during the design phase. The backend handles customer data processing, scheduling logic, and API communication, while Django's ORM (Object-Relational Mapping) streamlines interaction with the database. This implementation ensures that the system is reliable, scalable, and capable of supporting real-time customer engagement and automated appointment scheduling.

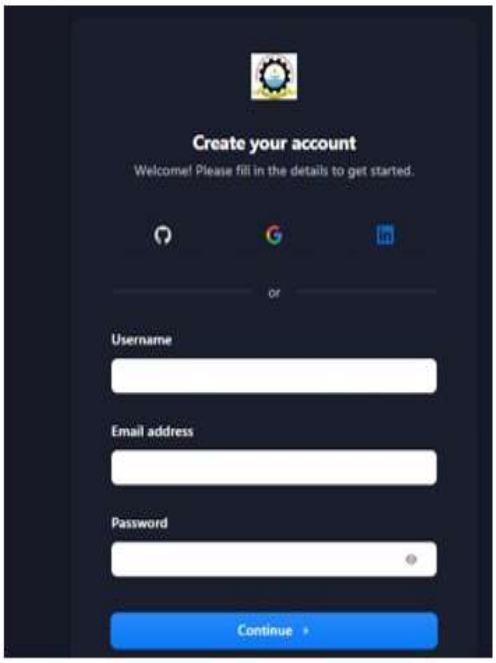

Figure 3: Registration Form

Figure 3 shows the registration form.

Registration Form: New users input their basic information, including name, contact details, and service preferences, to create an account. Once submitted, this data is stored securely in the MySQL database. This module ensures that customer profiles are initialized correctly, allowing seamless future interactions.

Figure 4 shows customer management scheduling module. The Customer Management Scheduling dashboard displays user details, past and upcoming appointments, and allows users to update their profiles. It also supports cancellation and rescheduling.

Scheduling Appointment is shown in Figure 5. The Scheduling Appointment, comes After logging in, customers can schedule appointments by selecting preferred dates, times, and available staff. The system checks availability in real-time and confirms bookings, ensuring no overlap in schedules.

Figure 4: Customer Management Scheduling Module

5. CONCLUSION

The significance of an enhanced customer management and scheduling system cannot be overstated in today's digital-driven business environment, where customer expectations are continuously evolving, and speed, accuracy, and convenience have become essential to service delivery. The implementation of a web-based solution that automates appointment scheduling and customer interactions has proven to be a vital tool for improving service efficiency and maintaining high customer satisfaction.

By transitioning from a largely manual or fragmented system to a centralised digital platform, the proposed system allows users to register, manage profiles, book or reschedule appointments, and receive notifications, all without the need to visit the service centre physically.

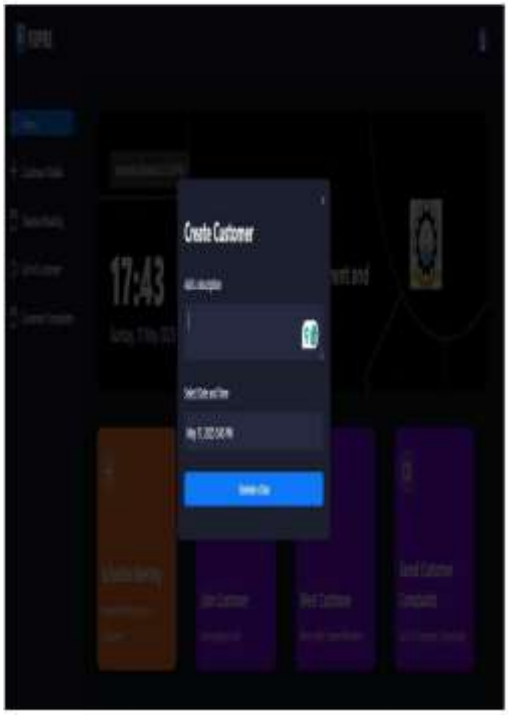

Figure 5 Scheduling Appointment

This shift not only streamlines business operations but also enhances user interaction, reduces administrative burdens, and improves responsiveness.

Developed using C#, React.js, MySQL, and Node.js, the system is designed to be scalable, efficient, and accessible. Its intuitive interface ensures that both customers and administrators can navigate and utilise the platform with ease. The enhanced system supports real-time data handling, better scheduling accuracy, and improved communication through embedded chat features, making it a practical and modern solution for businesses looking to optimise customer service and internal coordination.

This solution is highly valuable for organizations aiming to boost productivity, improve client relationships, and maintain a competitive edge through the adoption of digital tools that meet contemporary business demands.

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