PHASE 1 – Problem Statement & Use Case Document

HandsMenThreads – Salesforce-Powered Fashion Retail CRM

1. Introduction

HandsMenThreads is a modern men's fashion brand specializing in curated apparel collections, personalized style experiences, and premium-quality clothing. As the brand expanded, so did the complexity of its retail operations. Traditional management tools such as spreadsheets, WhatsApp messages, and loosely connected digital tools began to show limitations, especially in areas involving order fulfillment, inventory tracking, customer engagement, loyalty management, and marketing outreach. This phase defines the business problems, establishes the need for a scalable solution, and outlines the use cases that the Salesforce CRM implementation aims to address.

The primary goal is to build an integrated system that enhances customer satisfaction, supports business scalability, and automates repetitive tasks, allowing the team to focus on business growth. Salesforce, as a cloud-based CRM, provides the perfect foundation to centralize all customer activities, manage orders, and maintain real-time visibility into inventory and loyalty programs.

2. Problem Statement

As HandsMenThreads grew, operational challenges began impacting efficiency, customer experience, and overall sales performance. Several pain points were identified through discussions with the sales team, inventory handlers, marketing staff, and store managers.

Operational Challenges

- **Manual Order Tracking**
  Most orders were tracked in Excel sheets or through informal communication channels. This frequently caused mistakes such as lost orders, mismatched quantities, or incorrect billing details. Since there was no centralized source of truth, multiple versions of the same order often existed.

- **Inventory Inaccuracy**
  Stock levels were not updated in real-time. When an order was completed, stock deduction was done manually—leading to discrepancies between actual product availability and recorded inventory. Overselling became common during high-demand periods.

- **Lack of Automated Customer Communication**
  Customers often requested order confirmations, delivery updates, and product recommendations. Since communication was manual, customers experienced delays and miscommunication, resulting in lower trust and fewer repeat purchases.

- **No Loyalty System**
  The brand operates in a competitive fashion market where customer retention is crucial. A structured loyalty program did not exist, making it difficult to reward repeat customers or segment high-value clients for targeted marketing.

- **Unorganized Marketing Campaigns**
  Seasonal sales, product launches, and promotions were handled through ad-hoc methods

without tracking customer response or conversion rates. This made it impossible to measure campaign effectiveness or personalize outreach.

- **Limited Analytics and Reporting**
  Management lacked real-time dashboards showing:

  o   Monthly sales trends

  o   Best-selling products

  o   Top-performing customer segments

  o   Low-stock alerts

  o   Campaign performance metrics

Without data-driven insights, decision-making was reactive rather than strategic.

3. Why Salesforce CRM?

Salesforce serves as a unified platform to bring together all customer-centric operations. It offers automation, analytics, customization, and scalability. For HandsMenThreads, Salesforce enables the business to move from manual processes to a digital, automated workflow that supports growth.

Key reasons for choosing Salesforce:

- **Customization**: Build objects for Products, Orders, Customers, Loyalty, Campaigns.

- **Automation Tools**: Flows, validation rules, Apex triggers for advanced logic.

- **Dashboards & Reports**: Real-time visibility into operations.

- **Security & Access Control**: Prevent unauthorized access to sensitive data.

- **Scalability**: Support growing customer base and product catalog.

4. Use Cases

Below are the main business scenarios Salesforce will handle:

Use Case 1: Customer Profile & Relationship Management

Store complete customer details including:

- Contact information

- Purchase history

- Loyalty tier

- Lifetime value

- Preferences and interactions

Salesforce supports segmentation and personalized communication.

Use Case 2: Order Creation, Processing & Status Tracking

This includes:

- Selecting products

- Quantity and pricing

- Automated order total calculation

- Status updates such as Placed → Packed → Shipped → Delivered

- Automatic invoice email

Salesforce ensures each order follows a standardized process.

Use Case 3: Inventory & Stock Control

The system should:

- Deduct stock automatically after an order

- Prevent overselling

- Notify admins when stock drops below threshold

- Maintain accurate SKU-level visibility

Use Case 4: Loyalty Program Management

Salesforce calculates:

- Points earned per order

- Tier upgrades (Silver, Gold, Platinum)

- Rewards eligibility

This strengthens customer retention and brand loyalty.

Use Case 5: Marketing Campaign Management

Track campaigns like:

- Festive sales

- New arrivals

- Discount codes

- Customer targeting lists

Salesforce supports linking orders to campaigns to measure ROI.

Use Case 6: Analytics & Reporting

Dashboards offer insights into:

- Sales growth

- Inventory turnover

- Best-selling categories

- Customer lifetime value

- Campaign conversions

These insights help the business make informed decisions.

5. Conclusion

Phase 1 establishes a clear understanding of HandsMenThreads' operational challenges and articulates how Salesforce will address them. The use cases defined here serve as the foundation for all future phases, including data modeling, automation, UI design, and Apex development. The CRM solution will ultimately transform HandsMenThreads into a digitally empowered, data-driven fashion brand capable of delivering exceptional customer experiences.