Franchise Management CRM project

Project Overview:

The Franchise Management CRM is a Salesforce-based solution designed to help franchise businesses efficiently manage their network of outlets, sales performance, compliance processes, and franchisee relationships. The system centralizes franchise data, automates workflows, and provides actionable insights through dashboards and reports, supporting business growth and quality assurance.

Problem Statement:

- Franchise businesses often struggle with:
  - Dispersed and inconsistent data about outlets, sales, and franchisees.
  - Manual, error-prone compliance tracking and audits.
  - Difficulty in monitoring sales trends and identifying underperforming outlets.
  - Lack of streamlined communication and documentation between the parent company and franchisees.

- There is a need for a unified system that can:
  - Centralize all franchise-related data.
  - Automate compliance and audit processes.
  - Provide real-time insights to drive decisions and improve performance.
  - Enhance collaboration and transparency between franchise owners and the parent organization.

Project Objectives:

1. Centralize Franchise Data:
   Maintain detailed records of outlets, franchisees, sales, and compliance in one system.

2. Automate Compliance & Audits:
   Schedule and track regular compliance checks, notify stakeholders of issues, and ensure timely resolution.

3. Sales Tracking & Analysis:
   Record daily/monthly sales at each outlet and generate comparative reports to monitor growth and flag concerns.

4. Franchisee Relationship Management:
   Store franchisee contact details, agreements, and automate renewal/reminder workflows.

5. Performance Dashboards:
   Visualize key metrics such as top-performing outlets, compliance status, and sales trends for leadership and managers.

Salesforce Concepts Used:

To achieve these objectives, I will use Salesforce admin and developer tools:

Admin Concepts:

1. Custom Objects & Fields:
   For outlets, franchisees, sales records, and compliance checks.
2. Relationships (Master-Detail, Lookup):
   To link sales and compliance records to outlets/franchisees.
3. Page Layouts & Record Types:
   Tailor user experiences for managers, franchisees, and auditors.
4. Validation Rules:
   Ensure data quality (e.g., sales amount > 0).
5. Workflow Rules/Process Builder/Flows:
   Automate notifications, audit scheduling, and follow-ups.
6. Reports & Dashboards:
   For visualizing performance and compliance.

Developer Concepts:

1. Apex Triggers & Classes:
   Advanced automation, such as auto-scheduling audits or custom calculations.
2. Lightning Components / LWC:
   Custom UI for dashboards, quick data entry, or interactive forms.
3. Integration (optional):
   Connect with external applications (e.g., POS systems, compliance platforms).

Security & Sharing:

1. Profiles & Permission Sets:
   Control access for different users (franchisee, manager, auditor).
2. Sharing Rules:
   Ensure franchisees see only their own outlet data.