Phase - 1 (RetailHub CRM)

Problem Statement : A retail chain is facing challenges in managing customer engagement across both walk-in stores and online platforms. Currently, customer purchases are recorded in separate systems, and loyalty program points are tracked manually, leading to errors and dissatisfaction. Inventory shortages often result in lost sales, and managers cannot view real-time reports on sales performance, inventory status, or loyalty program effectiveness. Sales representatives also lack insights into high-value customers, which limits their ability to deliver personalized offers.

This fragmented process results in inefficient operations, poor customer satisfaction, and reduced sales growth. The proposed solution is to implement a Salesforce-based CRM system—RetailHub CRM—to centralize customer data, automate loyalty program tracking, and provide real-time inventory and reporting capabilities.

Phase 1.1: Requirement Gathering

The initial phase of the **RetailHub CRM project** focused on requirement gathering to clearly identify the core business challenges and operational pain points faced by the retail chain. The analysis revealed several critical issues that were hindering both growth and customer satisfaction.

Key Problems Identified

1. **Data Fragmentation**
    - Customer data was stored across multiple systems for walk-in stores and online platforms.
    - This prevented a **unified view of customer activity** and made customer engagement inconsistent.
2. **Manual Processes**
    - The existing **customer loyalty program** was managed manually.
    - This process was **prone to errors**, often leading to customer dissatisfaction and reduced trust.
3. **Inefficient Inventory Management**

    - The system lacked **real-time stock alerts**, resulting in frequent inventory shortages.
    - This led to **lost sales opportunities** and poor customer experience.

4. **Lack of Customer Insight**
    - Sales representatives did not have access to insights that could identify **high-value or loyal customers**.
    - This limited their ability to deliver **personalized services and targeted offers**.

5. **Reporting Deficiencies**
    - Management was unable to access **real-time reports or dashboards**.
    - This created challenges in **assessing sales performance** and evaluating the **effectiveness of loyalty programs**.

Phase 1.2: Stakeholder Analysis

Following the requirement gathering, a **stakeholder analysis** was conducted to identify the key user groups who would be directly impacted by the new CRM system. This step was crucial to ensure that the application addresses the unique perspectives, needs, and expectations of all relevant parties.

Main Stakeholders Identified

1. **Store Managers**
    - Need: High-level visibility into store performance.
    - Key Requirements: Real-time dashboards providing insights into **sales, inventory, and loyalty program effectiveness**.

2. **Sales Representatives**
    - Need: Enhanced tools for customer engagement.
    - Key Requirements: Access to **comprehensive customer profiles** and **up-to-date loyalty information** to deliver personalized services and offers.

3. **Customers**
    - Need: A simplified and engaging shopping experience.
    - Key Requirements: Easy **loyalty point tracking**, **personalized promotions**, and clear visibility of **product availability** across channels.
4. **Business Owners**
    - Need: Strategic insights for decision-making.
    - Key Requirements: Summary-level **reports and analytics** covering **sales growth, customer retention, and overall store performance**.

Phase 1.3: Business Process Mapping

To understand the full impact of the proposed CRM, the project team mapped the existing **manual business processes** and contrasted them with the **future-state automated processes** that would be enabled by Salesforce. This exercise highlighted key opportunities for improvement in **efficiency, accuracy, and speed**.

Current (As-Is) Manual Process

The analysis of the existing workflows revealed several inefficiencies:

1. **Purchases Management**
    - Purchases were logged in disparate systems, such as Excel spreadsheets or standalone Point-of-Sale (POS) systems.
    - This fragmented approach created data silos and inconsistencies.
2. **Loyalty Program Tracking**
    - Customer loyalty points were calculated and updated manually by staff.
    - This process was slow, error-prone, and negatively impacted customer satisfaction.
3. **Inventory & Stock Updates**

- Inventory information was not updated in real-time and was often restricted to individual stores.
- This led to frequent stockouts and delayed restocking decisions.

4. **Reporting**
    - Performance reports were generated infrequently, often only on a monthly basis.
    - Managers lacked timely insights for decision-making.

Proposed (To-Be) Salesforce-Enabled Process

The Salesforce CRM solution will centralize and automate these processes to improve accuracy and visibility:

1. **Centralized Purchase Logging**
    - All purchases from every channel (in-store and online) will be recorded directly in Salesforce.
    - This ensures a unified view of customer transactions.
2. **Automated Loyalty Management**
    - Loyalty points will be calculated and applied automatically using **business rules and automation** (flows, triggers, or process builders).
    - This eliminates manual errors and improves customer satisfaction.
3. **Real-Time Inventory Updates**
    - Product stock levels will update automatically in real time.
    - Low-stock alerts will be generated and sent to managers proactively.
4. **Instant Dashboards & Reports**
    - Salesforce dashboards will provide managers with **up-to-date performance metrics**.

- This enables quick and data-driven decision-making.