

RetailHub CRM – Customer Loyalty & Inventory System

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.

Future Plan

The RetailHub CRM project will be implemented in multiple phases:

1. Requirement Analysis & Stakeholder Mapping – Understand challenges faced by managers, sales reps, and customers.
2. Salesforce Org Setup – Configure users, roles, profiles, and company settings.
3. Data Modeling – Create objects for Customers, Products, Purchases, and Loyalty Transactions.
4. Process Automation – Automate loyalty point calculations, inventory alerts, and customer notifications.
5. Apex Development – Implement triggers and classes for advanced logic such as personalized recommendations and batch processing.
6. Lightning Components – Build LWC dashboards for sales reps and managers.
7. Integration – Connect with e-commerce website for online sales and external APIs for notifications.
8. Deployment & Testing – Migrate from sandbox to production with test classes and QA.
9. Reporting & Dashboards – Provide insights into sales performance, inventory levels, and loyalty program effectiveness.
10. Final Demo & Documentation – Present results, feedback collection, and project handover.

Scope

The scope of the RetailHub CRM includes:

- Centralized customer data management across online and offline channels.
- Automated loyalty program with points earning, redemption, and tier management.
- Real-time inventory tracking and low-stock alerts for managers.
- Personalized recommendations for customers based on purchase history.
- Custom dashboards for store managers to analyze sales performance and customer engagement.
- Secure access control for managers and sales representatives.

Out of Scope:

- Full-fledged payment processing system.
- Third-party ERP integration (planned for future phases).