ShopSmart – E-commerce Customer Engagement & Order Tracking System

# Phase 1: Problem Understanding & Industry Analysis

## Problem Statement

The online retail company receives thousands of customer orders daily via its website and mobile app. However, the existing processes are fragmented and lead to multiple issues. Customer support teams face difficulties in providing real-time updates on order status, shipping, and returns. Marketing campaigns are generic and not personalized, reducing customer engagement and loyalty. Warehouse managers struggle with visibility into order fulfillment and returns. Additionally, management lacks consolidated dashboards to track customer experience, sales performance, and product trends. These gaps result in lower customer satisfaction, inefficiencies, and lost revenue opportunities.

## Requirement Gathering

• Centralize customer and order data within Salesforce

• Real-time order tracking with automated status updates (Placed → Shipped → Delivered → Returned)

• Personalized marketing campaigns using customer purchase history and preferences

• Dashboards for sales trends, customer loyalty, and product return analysis

• Automated customer notifications (order confirmation, shipment tracking, return updates)

• Role-based access for Sales, Support, Warehouse, and Management

• Seamless integration with website/app and logistics APIs

## Stakeholder Analysis

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| Stakeholder | Role | Key Needs |
| Sales Manager | Oversees sales and marketing campaigns | Personalized campaigns, customer insights, real-time revenue trends |
| Warehouse Manager | Manages stock & order fulfillment | Order tracking, inventory alerts, smooth return workflows |
| Customer Support | Handles customer queries & complaints | Quick access to customer order history, proactive notifications |
| Business Owner / CEO | Decision maker | Dashboards on customer engagement, sales performance, and returns |
| IT / Salesforce Admin | Configures Salesforce | Maintain scalable, secure, and integrated system |

## Business Process Mapping

## Current State (As-Is Process)

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| --- | --- | --- | --- |
| Step | Owner | Process Description | Pain Points |
| 1 | Customer / Website | Customers place orders on the website or app, which are manually logged into disparate systems. | Manual entry delays, errors, no single source of truth. |
| 2 | Warehouse | Warehouse staff update stock only once per day in spreadsheets. | Frequent stockouts, overselling, lack of real-time sync. |
| 3 | Customer Support | Customers contact support for order/return status updates. | High workload, delayed responses, low customer satisfaction. |
| 4 | Marketing | Generic campaigns sent to all customers. | Low engagement, poor targeting, missed upsell opportunities. |
| 5 | Management | Sales & returns data consolidated monthly. | Delayed insights, lack of KPIs, no real-time decision-making. |

## Business Process Mapping – Future State (To-Be Process)

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| --- | --- | --- | --- |
| Step | Owner | Automated Solution in Salesforce | Benefit |
| 1 | Customer / Website | Orders captured directly into Salesforce via API or LWC form. | Eliminates manual entry, improves accuracy. |
| 2 | Flow + Trigger | Real-time inventory update with low-stock alerts. | Prevents overselling, ensures timely restocking. |
| 3 | Flow + Email / SMS Alert | Automated notifications for order placement, shipment, and returns. | Enhanced customer experience, fewer support calls. |
| 4 | Marketing Cloud / Journey Builder | Personalized campaigns based on purchase history. | Higher engagement, improved loyalty, increased sales. |
| 5 | Dashboards | Live dashboards for sales, returns, and engagement KPIs. | Faster decisions, better forecasting. |

## Industry-Specific Use Case Analysis

1. Order Lifecycle Automation: Orders automatically progress through stages (Placed → Shipped → Delivered → Returned) with notifications at each step.  
  
2. Inventory Synchronization: Real-time stock level updates ensure accurate availability and reduce overselling risks.  
  
3. Customer Engagement: Personalized marketing journeys, loyalty rewards, and proactive notifications drive repeat purchases.  
  
4. Return & Refund Management: Automated workflows streamline returns and refunds while keeping customers informed.  
  
5. Performance Insights: Live dashboards show KPIs for sales, customer retention, product returns, and marketing effectiveness.  
  
6. Scalability & Growth: Salesforce infrastructure ensures seamless handling of higher order volumes as the business expands.