Retail Loyalty CRM

Phase 1: Problem Understanding & Industry Analysis

👉 **Goal: Understand customer retention challenges in retail and e-commerce.**

1. **Requirement Gathering**

   - Personalized loyalty program (no generic discounts).

   - Real-time feedback collection (surveys, SMS, social media).

   - Predictive churn detection.

   - Targeted campaigns for high-value customers.

2. **Stakeholder Analysis**

   - **Store Managers:** Track loyalty, approve high-value offers.

   - **Marketing Teams:** Design & run segmented campaigns.

   - **Customer Support Teams:** Resolve negative feedback quickly.

   - **Customers:** Receive points, offers, and share feedback.

3. **Business Process Mapping**

   - Purchase → Points assigned → Feedback collected → Sentiment analyzed → Offers generated → Negative feedback escalated → Reports/dashboard updated.

4. **Industry Use Case Analysis**

   - Retail suffers from high churn due to generic promotions.

   - Competitors focus on instant offers; few focus on **personalized, AI-driven campaigns**.

   - Integrating **loyalty + feedback** in one CRM system is a differentiator.

5. **AppExchange Exploration**

○ Existing loyalty apps exist but lack **real-time feedback integration**.

Phase 2: Org Setup & Configuration

👉 **Goal: Configure Salesforce environment for CRM project.**

1. **Salesforce Editions**

   ○ Use **Developer Edition Developer Org** (free dev org).

2. **Company Profile Setup**

   ○ Go to **Company Settings** → add company info, local time zone.

   ○ Set currency to INR/USD depending on the project.

3. **Business Hours & Holidays**

   ○ Define working hours (10am–10pm).

   ○ Add public holidays (no approvals on these days).

4. **Fiscal Year Settings**

   ○ Standard (Jan–Dec) → good for revenue reporting.

5. **User Setup & Licenses**

   ○ Create users: Rental Agent, Manager. Assign them Salesforce licenses.

6. **Login Access Policies**

   ○ Restrict login hours (9am–6pm for agents).

7. **Dev Org Setup**

   ○ This is your sandbox → where you build/test.

8. **Sandbox Usage**

   ○ If this were a real company, we'd build in Sandbox, then deploy to Production.

9. **Deployment Basics**

   ○ Deployment is moving config/code from sandbox → production using sets