**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