USE CASE & USER STORY

User Story: Octave Marketing Campaign

❖ **User Story Title:**

Create a customer segment to conduct an effective marketing campaign.

❖ **User Story Description:**

As a marketing executive, I want the ability to generate and view customer segments based on purchasing behavior across three different categories (fresh sales, dry sales, and luxury sales) on 20 different outlets all around Sri Lanka, so I can conduct targeted and effective marketing campaigns with higher engagement and ROI.

This feature allows the stakeholders to access the dashboard, apply a segmentation filter, and view suggested marketing campaigns for each segment.

❖ **UI Sketches/UI references:**
- ✓ UI_Mockup_CustomerFilterPage
- ✓ UI_Mockup_ExportReportView
- ✓ UI_Mockup_SegmentDashboard

❖ **Acceptance Criteria:**
(user = Marketing Lead)

- o User logs into the analytics dashboard.
- o User clicks on the "Customer Segmentation" section.
- o The system displays all active customer segments in chart and card format.
- o User applies filters (e.g., age range, product category, last purchase).
- o The system dynamically updates the segments based on selected criteria.
- o Each segment card includes:
- ✓ Segment name
- ✓ Number of customers

- ✓ Key behavior traits
- ✓ Suggested campaign type

- o User clicks "Export Report" to download the selected segment data (PDF/Excel).
- o The system successfully generates reports and notifies the user with confirmation.
- o The user can access previous segment reports under the "History" tab.
- o The system handles exceptions (e.g., no matching results, export error).

Note:

This is a Level 1 User Story and can be broken down into atomic sub-stories such as:

- View all segments
- Apply segmentation filters
- View suggested campaign types
- Export segment reports

Use Case: Octave Marketing Campaign

Use Case Name:	Generate Customer Segments for Marketing Campaign and provide recommendations
Use Case ID:	UC_OCTAVE_001
Business Req Ref:	BR_OCTAVE_004 *(Refers to: "The solution must process and segment customers based on purchasing behavior and demographics.")*
Primary Actor:	Marketing Executive
Secondary Actor:	Customer Segmentation System (dashboard and ML model
Pre-Condition	The segmentation model (Neural Network) has been developed, tested, and deployed. The user has access to the campaign dashboard.
Trigger:	A marketing executive wants to prepare a targeted campaign by analyzing customer data.
Use case description:	This use case describes the process a Marketing Executive follows to access customer segmentation insights, apply filters based on behavior and demographics, and download the results to plan a personalized marketing campaign. The system recommends campaign strategies per segment and allows exporting the data.

Basic Flow:	1. Marketing Executive logs into the campaign dashboard.
	    a. System displays main menu with "Segmentation" option.
	2. User selects "Customer Segmentation."
	    a. System shows visual tiles/cards representing each existing segment with KPIs.

	3. User applies filters (e.g., age group, location, last purchase, product category).
	    a. System dynamically updates segment data and visualizations.
	4. User clicks on a segment to view more detailed behavior patterns.
	    a. System displays characteristics, purchase behavior, and recommended campaign strategy.
	5. User clicks "Export Report."
	    a. System generates a downloadable PDF/Excel report of the selected segment with key data.
	6. System sends confirmation and saves report in "History" section.

Alternate Flows:	1. **No Segments Match Filters:**
	    a. System shows message: "No matching customers found. Try adjusting filters."
	2. **Segment Report Already Exists:**
	    a. System asks user: "Would you like to overwrite or create a new version?"

Exception Flows:	Export Fails due to Backend Error:
	    a. System shows error: "Export failed. Please try again later or contact support."
	    b. The retry option is shown.

UI References:	o UI_Mockup_OctaveDashboard o UI_Mockup_SegmentFilterPage o UI_Mockup_SegmentReportExport