**Phase 1: Problem Understanding & Industry Analysis**

1. **Requirement Gathering**

The business problem identified was the need to build a **Loyalty Management and Customer Re-engagement System** on Salesforce for an **E-commerce/Retail environment**.

**Key requirements we captured:**

1. **Loyalty Points Management**

* + Customers should earn loyalty points automatically when they place and activate an order.
  + The system must calculate points using the formula:

LoyaltyPoints=FLOOR(TotalAmount ÷ 100)Loyalty Points =

\text{FLOOR(TotalAmount ÷ 100)}LoyaltyPoints=FLOOR(TotalAmount ÷ 100)

Example: ₹2,350 order → 23 points.

1. **Reward Redemption** o Customers should be able to log into a self-service portal and claim rewards using their accumulated loyalty points.

o High-value redemptions (≥ 500 points) must require **manager approval**.

1. **Inactive Customer Re-engagement**

o The system must automatically detect customers who have not placed orders in the last 90 days.

These customers should receive a **“We Miss You” email** and a **followup task** for the support agent.

1. **Error Handling**

o Any flow or automation error should be logged in a custom object (Error\_Log\_\_c) for better debugging and transparency.

1. **Business Insights** o Managers should have **Reports & Dashboards** to track:
   * + Loyalty points by tier.
     + Reward redemptions by status.
     + Orders contributing to loyalty points.
     + Inactive customers re-engaged.

1. **Stakeholder Analysis**

|  |  |  |
| --- | --- | --- |
| **Stakeholder** | **Role** | **Expectations** |
| **End Customers** | Buyers using the portal | Earn points, redeem rewards, stay engaged |
| **Support Agents** | Handle cases, customer interactions | View loyalty data, orders, and help reengage inactive customers |
| **Support**  **Managers** | Approvers of high-value redemptions | Monitor dashboards, approve reward redemptions |
| **Salesforce**  **Admin** | Setup & configuration | Configure objects, flows, and  validation rules |
| **Salesforce**  **Developer** | Custom development | Apex triggers, test classes, and error handling |

1. **Business Process Mapping**

The entire lifecycle of the solution:

* 1. **Order Placement** o A customer places an order. o Once the order is activated → loyalty points are automatically added to their profile.
  2. **Loyalty Member Updates**

Each customer has a **Loyalty Member record** linked to their Contact.

* + - Points are updated, and Loyalty History is logged.
  1. **Reward Redemption**
     + Customers log into a portal to claim rewards. o If sufficient points are available: redemption record is created.
     + If redemption exceeds threshold → approval request goes to Manager.

1. **Inactive Customer Detection**
   * + A scheduled flow identifies inactive customers (no orders in last 90 days).
     + Sends **re-engagement email** + creates **follow-up task** for agents.
2. **Error Logging** o Any failure in automation writes to the Error\_Log\_\_c custom object.
3. **Business Dashboards** o Dashboards show key loyalty metrics for managers and agents.

1. **Industry-Specific Use Case Analysis** 
   * **Industry:** E-commerce & Retail.
   * **Pain Points Addressed:**
     + Customers stop engaging after a while (churn).

No visibility into customer loyalty.

* + - Reward redemption process requires manual tracking.
  + **Solution Fit:**
    - Provides automated loyalty tracking.
    - Builds stronger customer retention through points and rewards. o Gives managers **data-driven insights** via dashboards.

1. **AppExchange Exploration**

We reviewed existing **Loyalty Management Apps on AppExchange**, but they:

* + Were either **too generic** or **too expensive**.
  + Did not allow the level of customization we required.

**Decision:** Build a **custom solution** with:

* + Custom Objects (Loyalty\_Member\_\_c, Reward\_Redemption\_\_c,

Loyalty\_Points\_History\_\_c, Error\_Log\_\_c).

* + Apex Trigger (OrderTriggerHandler) for points calculation.
  + Flows for:
    - Loyalty Tier sync.
    - Order-based points updates. o Claim Reward Portal.

Inactive Customer Re-engagement.

* + Validation rules to ensure clean data.
  + Reports & Dashboards for visualization.

**Summary of Phase 1:**

We successfully captured the **problem, requirements, stakeholders, industry mapping, and approach**. The decision to go with a **custom Salesforce solution** instead of AppExchange ensured flexibility and full alignment with business needs

**ScreenShots:**



