TCS LAST MILE CAPSTONE PROJECT

Project Title: Smart Customer Retention & Loyalty Management System

Phase 1: Problem Understanding & Industry Analysis

© Requirement Gathering

Objective:

To identify customer retention and loyalty challenges and specify the system features required for addressing them.

Approach:

- Conducted stakeholder interviews and discussions (sales, marketing, support, finance) to capture current issues in retention and loyalty management.
- Reviewed historical data such as churn rates, customer lifetime value, and loyalty adoption.
- Identified essential features: churn prediction, loyalty tiering, personalized outreach, campaign management, and ROI measurement.

Deliverables:

- Requirement log with business, user, and system requirements.
- Workflow diagrams showing current vs. proposed processes.
- Use case scenarios for key user roles (manager, agent, customer).

Observation:

Major gaps were identified in delayed churn detection and manual customer outreach. Automation and predictive analytics are necessary improvements.

† Stakeholder Analysis

Objective:

To identify stakeholders, their interests, and their roles in customer retention and loyalty management.

Method:

- Internal stakeholders: CSMs, Sales Leads, Marketing Team, Data Analytics, IT, Executives.
- External stakeholders: Customers, integration partners, and loyalty platforms.

- Stakeholder needs: CSMs expect proactive churn alerts, executives focus on ROI, customers expect transparent and rewarding programs.
- RACI chart planned to define responsibilities.

Deliverables:

- Stakeholder matrix with influence and engagement levels.
- RACI chart for project activities.

Observation:

Different stakeholder groups prioritize different outcomes. Customers focus on rewards, while managers and executives expect measurable business results.

Business Process Mapping

Objective:

To analyze current customer retention and loyalty workflows and identify areas for improvement.

Tasks:

- Mapped customer journey from onboarding to churn.
- Documented loyalty program processes: enrollment, earning, redemption, and targeting.
- Identified issues: manual outreach, lack of segmentation, delayed churn response.
- Designed improved workflows including automation, AI, and real-time insights.

Deliverables:

- Swimlane diagrams comparing current vs. improved workflows.
- Process documentation with steps, owners, and data hand-offs.

Observation:

Most inefficiencies were linked to manual processes and lack of proactive mechanisms. Automation can streamline and improve retention.

Industry-Specific Use Case Analysis

Objective:

To benchmark customer retention and loyalty practices across industries.

Method:

- Reviewed case studies from e-commerce, telecom, SaaS, and retail.
- Best practices identified: predictive churn scoring, gamification, tiered loyalty rewards, and proactive engagement.

- Features mapped to system components.
- Differentiated features for MVP and future expansion.

Deliverables:

- Literature review of benchmark programs.
- Best-practice mapping to system features.
- Recommendations for MVP vs. future scope.

Observation:

Gamification and personalization are common success factors in loyalty programs and should be considered core features.



AppExchange Exploration

Objective:

To explore Salesforce AppExchange solutions relevant to retention and loyalty management.

Tasks:

- Researched available apps for churn prediction, loyalty management, and marketing automation.
- Evaluated tools such as Einstein Analytics and survey platforms.
- Determined areas suitable for reuse versus custom development.
- Planned sandbox testing and integration requirements.

Deliverables:

- AppExchange feature evaluation matrix.
- Recommendation report for adoption/customization.
- Integration plan with APIs or connectors.

Observation:

Salesforce ecosystem already provides many accelerators that reduce the need for complete custom development.