

## Phase 1: Problem Understanding & Industry Analysis

# PetCare CRM

## A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

### Problem Statement

Pet shops often face inefficiencies due to:

- Lack of centralized customer, pet, and service data.
- Manual tracking of appointments, purchases, and vaccination schedules.
- Poor coordination between customers, staff, and veterinarians.
- No real-time insights into inventory levels, sales, or customer engagement.

This leads to missed appointments, stock shortages or excess inventory, poor customer experience, and limited decision-making for shop managers.

### Objectives

1. To centralize **Customer, Pet, Appointment, and Product data** in **Salesforce**.
2. To automate **Service Reminders** for appointments and vaccinations through **Email Alerts**.
3. To streamline **Appointment Booking** using **Lightning Web Components (LWC)**.
4. To implement **Inventory Management** with **Stock Tracking** and **Low-Stock Alerts**.
5. To provide **Real-Time Dashboards and Reports** for sales, appointments, and customer engagement.

### Use Cases

1. **Customer & Pet Management**
  - Register customers and their pets with details like type, breed, and vaccination status.
  - Track purchase history and membership type.
2. **Appointment Booking & Reminders**
  - Customers can book grooming or vet appointments via LWC.
  - Automatic email reminders sent before appointments.
3. **Inventory Tracking**
  - Add products (food, medicines, accessories) into Salesforce.

- Track stock levels and generate low-stock alerts using validation rules or scheduled jobs.
- 4. **Reports & Dashboards**
  - Sales by product category (Food, Medicine, Accessories).
  - Appointment trends by service type.
  - Top customers based on purchase frequency.
- 5. **Approval Process**
  - Simulate approval workflow for discount requests on bulk purchases.

### **Stakeholder Analysis**

- **Customers/Pet Owners:** Want easy booking, timely reminders, and better service.
- **Shop Staff:** Need to manage appointments, pet details, and sales records efficiently.
- **Managers/Admins:** Want dashboards to monitor sales, service usage, and inventory.

### **Business Process Mapping (Before Salesforce)**

- Customers call shop → Staff notes appointments manually.
- Inventory updated in notebooks or Excel → Errors and delays.
- Customer and pet details scattered across papers/files.
- Reports prepared manually → Time-consuming and inaccurate.

### **Industry-Specific Use Case Analysis (Pet Care)**

- Similar to **Healthcare CRM**: Pets as patients, appointments as vet visits.
- Similar to **Retail CRM**: Inventory and sales tracking for products.
- Similar to **Service CRM**: Grooming and vaccination as bookable services.