

CRM Project – HR Recruitment Process

Phase 1: Problem Understanding & Industry Analysis

- **Goal: Track orders from placement → packing → shipping → delivery.**

1. Requirement Gathering

The first step is to understand the core requirements of an **E-commerce Order and Delivery Tracking System**.

Key functional requirements include:

- Enable customers to place and manage orders.
- Track orders across multiple stages: *Placed → Packed → Shipped → Out for Delivery → Delivered/Failed*.
- Provide real-time delivery status updates to customers via **Email/SMS/Portal**.
- Support order assignment to delivery agents (manual or automated).
- Manage exceptions such as **delayed deliveries, failed attempts, or returns**.
- Generate actionable reports and dashboards for monitoring:
 - Daily/Monthly order volumes.
 - On-time vs delayed deliveries.
 - Delivery agent performance.
 - Region-wise delivery success rate.

2. Stakeholder Analysis

The system must cater to the needs of multiple stakeholders:

- **Admin:** Oversees system setup, monitors performance, configures business rules.
- **Customer:** Places orders and tracks delivery status in real time.
- **Delivery Agent:** Updates the status of assigned deliveries (shipped, delivered, failed).
- **Support Team:** Handles customer queries, reschedules failed deliveries, and processes refunds.
- **Manager:** Reviews KPIs, approves escalations/refunds, and ensures SLA compliance.

3. Business Process Mapping

The end-to-end process can be summarized as follows:

1. **Customer places an order** through the e-commerce platform.

2. **System creates an Order record** with relevant details.
3. **Order is assigned** to a delivery agent or logistics partner.
4. **Delivery agent updates status** as the order progresses through its lifecycle.
5. **System sends notifications** to the customer at each stage.
6. **In case of failure/delay**, the support team intervenes.
7. **Reports and dashboards** are generated for managers to analyze overall efficiency.

This process ensures **transparency, accountability, and customer satisfaction**.

4. Industry-Specific Use Case Analysis

In the **e-commerce and logistics industry**, order tracking plays a vital role in customer trust and retention.

- ❖ **High-volume operations:** Thousands of orders may need simultaneous tracking.
- ❖ **Strict SLAs:** Deliveries must be completed within promised timelines (e.g., 24–48 hours).
- ❖ **Third-party logistics:** Many businesses rely on multiple courier partners, requiring API integration.
- ❖ **Customer experience:** Real-time updates and proactive issue resolution directly impact brand reputation.

By addressing these challenges, the system becomes a **critical enabler of business growth**.

5. Existing Solutions vs Custom Build

While several **pre-built logistics and tracking apps** exist in Salesforce AppExchange, they are often complex or costly.

For this project, we will **design a simplified, custom solution** to meet essential requirements while ensuring scalability and flexibility.

