

# Restaurant Customer Relationship Management

**Industry:** Food & Beverage

**Project Type:** B2C Salesforce CRM Implementation

**Target Users:** Restaurant Managers, Staff, Customers, Marketing Team

## Problem Statement

A restaurant chain manages hundreds of daily bookings, food orders, and customer interactions. However, they face challenges:

- Manual booking confirmations are slow and error-prone.
- Orders and bookings are tracked in separate systems.
- No loyalty tracking to reward repeat customers.
- Managers lack real-time insights into top customers, popular dishes, and peak hours.

To address these challenges, the restaurant wants to implement a **Salesforce CRM** to:

- Manage **Bookings, Orders, Customers, and Loyalty Points** in one system.
- Automate **booking confirmations and order notifications** via email/SMS.
- Track **customer loyalty points and redemption history**.
- Provide **dashboards and reports** for top customers, sales trends, and peak booking times.
- Improve customer engagement with personalized offers and loyalty rewards.

## Use Cases

### 1. Booking Management

- Customers book tables online, via phone, or walk-ins.
- Salesforce auto-creates a **Booking record** linked to the Customer.
- Flow sends **auto-confirmation email/SMS**.

- Managers can view **upcoming reservations** on a calendar dashboard.

## **2. Order Management**

- Track dine-in and takeaway orders.
- Link **Orders** to both Customer and Booking.
- Auto-generate order confirmation & notify kitchen team.
- Report: Most ordered items, peak order times, order value trends.

## **3. Customer Management**

- Maintain customer profiles with preferences & order history.
- Link bookings and orders to customers.
- Identify **repeat vs new customers**.
- Support marketing campaigns (email/SMS offers).

## **4. Loyalty Management**

- Award loyalty points per order (e.g., 1 point per ₹100).
- Track redemption of points against new orders.
- Auto-notify customers when they earn/redeem points.
- Report: Top loyalty members, redemption trends.

## **5. Reporting & Dashboards**

- **Top Customers** by revenue/visits.
- **Peak Booking Times** by day/hour.
- **Most Ordered Items** and category trends.
- **Loyalty Points Report** (earned vs redeemed).
- Dynamic dashboards for managers.