Project Title – A CRM Application to Manage The Mall

1. Project Overview

The **CRM Application for Mall Management** is designed to enhance the operations and customer experience in a mall setting. The system integrates various functionalities, such as tenant management, customer engagement, sales tracking, and marketing campaigns, into a single platform. It aims to streamline the management of the mall, improve tenant relationships, increase customer satisfaction, and ultimately boost the mall's revenue through effective relationship management.

2. Objectives

Business Goals:

1. **Increase Revenue through Targeted Marketing and Promotions:** Leverage customer data and advanced analytics to optimize marketing strategies and drive higher sales for both the mall and individual tenants.
2. **Improve Customer Retention and Loyalty**: Foster customer loyalty through personalized interactions, loyalty programs, and a seamless omni channel experience that increases repeat visits and long-term engagement.
3. **Foster Community Engagement and Social Responsibility**: Use the CRM platform to connect with the community, promote sustainability initiatives, and engage in social responsibility projects that build brand equity.
4. **Enable Seamless Omni channel Experience**: Integrate online and offline touch points to create a unified shopping experience, providing customers with the ability to engage with the mall both digitally and physically.

Specific Outcomes:

1. **Increase Revenue through Targeted Marketing and Promotions:** 10-15% increase in sales **across** mall retailers due to the launch of targeted marketing campaigns that utilize customer data for personalized offers.
2. **Improve Customer Retention and Loyalty:** Increase repeat visits by 20% from loyalty program members who receive personalized promotions and rewards.
3. **Improve Customer Experience and Satisfaction:** 85-90% positive customer satisfaction rating based on surveys about the mall's services, events, and overall experience.
4. **Increase Foot Traffic and Mall Engagement:** 15% increase in overall foot traffic through the use of targeted promotions, events, and marketing campaigns that encourage repeat visits and new customers.

3. Sales force Key Features and Concepts Utilized

1. Salesforce Objects and Data Model:

- **Shops**: Custom object for individual shops in the mall to store information about store types, sales performance, products, and promotions.
- **Events**: A custom object to manage mall events such as sales promotions, exhibitions, and other customer engagement activities.

2. Salesforce Automation Features:

- **Workflow Rules**: Automate simple actions such as sending email notifications to mall tenants when a customer visits or when new sales promotions are activated.
- **Process Builder**: Create more complex automation for actions like generating a task when a customer registers for an event, sending thank-you notes to customers after a purchase, or following up with vendors about supplies.

3. Customer Engagement and Experience:

- **Email Campaigns**: Send tailored email campaigns to customers about new events, sales, and promotions.
- **SMS and Push Notifications**: Communicate directly with customers via mobile messaging about store openings, sales, or exclusive discounts.

4. Vendor and Tenant Management:

- **Vendor Accounts**: Track and manage relationships with the vendors supplying products to mall stores. Salesforce allows you to manage contracts, inventory needs, and performance.
- **Opportunity Management**: Use Opportunities to track potential business dealings, like negotiating contracts with new tenants or securing event sponsors.

5. Event Management

- **Event Registration**: Use Custom Objects and Web-to-Lead forms to enable customers to register for events directly through the mall's website or via email campaigns.
- **Event Tracking and Attendance**: Track customer attendance for events and promotions. Salesforce can automatically log events that customers attend, track their interactions, and even trigger follow-up communications post-event.

6. Customer Loyalty and Rewards Programs

- **Loyalty Programs**: Salesforce allows the setup of loyalty programs where customers earn points based on their purchases or visits to the mall. These points can be tracked in **Custom Objects** and integrated with Marketing Cloud for personalized offers.
- **Customer Segmentation for Rewards**: Use data from customer profiles to offer personalized discounts, early access to events, or exclusive sales based on customer loyalty levels.

4. Detailed Steps to Solution Design

Solution Overview: Designing a CRM application for a mall using **Salesforce** requires a structured approach that takes into account various components such as customer engagement, vendor management, event planning, sales tracking, and reporting. Below is a step-by-step breakdown of the solution design, from requirements gathering to deployment and ongoing optimization.

Step 1: Requirement Gathering and Analysis

1. **Identify Key Stakeholders** - Mall administrators, shop owners, mall visitors, and service teams.
2. **Define Core Requirements**:
    - **Customer management** for tracking visitor data, preferences, and feedback.
    - **Tenant management** for managing relationships with shops in the mall, including leasing, rent payments, and maintenance requests.
    - **Event and Marketing Management** for organizing events, promotions, and loyalty programs.
    - **Operations and Maintenance Tracking** for scheduling repairs, cleaning, and other facility management.
3. **Determine Technical Requirements**:
    - Scalability for handling data from multiple tenants and visitors.
    - Security for protecting customer data and financial transactions.
    - Integration needs with external services (e.g., POS systems, payment gateways).

Step 2: System Architecture Design

1. **Define System Components**:
    - **CRM Database** for storing customer, tenant, and event data.
    - **User Interfaces** tailored for mall managers, tenants, and customers.
    - **Integration Layer** to connect with external services.
2. **Determine Data Flow and Access Control**:
    - Define the data flow between tenants, CRM, and mall administration.
    - Implement role-based access for tenants, admins, and customer support teams.
3. **Choose the Tech Stack**:
    - **Back-end**: Node.js, Django, or similar.
    - **Database**: MySQL for structured data or MongoDB for flexibility.
    - **Front-end**: React or Angular for responsive UI.

Step 3: Feature Detailing and Design Mockups

1. **Develop Wireframes** for key interfaces:
    - Tenant Dashboard for managing their leases, sales data, and store information.
    - Customer App for viewing events, promotions, and loyalty points.

- Admin Panel for managing mall-wide operations and analytics.

2. **Define Key Functionalities**:
   - Customer Segmentation and Personalization for targeted marketing.
   - Ticketing System for support requests from tenants and customers.
   - Analytics Dashboard to track footfall, sales trends, and engagement metrics.
3. **Create Data Models**:
   - Customer, tenant, event, and operations tables with their relationships.
   - Define data fields needed for real-time analytics and reporting.

Step 4: Prototyping and Testing

1. **Develop MVP** to validate core functionalities.
   - Basic customer, tenant, and event management features.
   - Initial dashboard for admin with essential analytics.
2. **Conduct Testing**:
   - **Unit Testing** for each module to ensure functionality.
   - **Integration Testing** to ensure smooth data flow across modules.
   - **User Testing** with key stakeholders to get feedback on usability.
3. **Iterate Based on Feedback** and plan additional features, optimizations, and scalability based on initial testing and stakeholder feedback.

4. Testing and Validation

Testing and validation are crucial phases in ensuring the quality, functionality, and reliability of a CRM application for managing a mall. Here's a breakdown of key testing stages and validation processes for this CRM application:

Unit Testing

- **Objective**: Validate individual components, such as CRM modules for customer, tenant, and event management.
- **Key Areas**:
  - **Data Operations**: Verify CRUD (Create, Read, Update, Delete) operations for tenants, customers, and event records.
  - **Business Logic Validation**: Test custom logic, like calculating loyalty points for mall customers or tenant billing.
  - **Form Validation**: Ensure input validation on fields like email, phone number, and other required data.
- **Tools**: Use unit testing frameworks like JUnit or Mocha for back-end, and Jest for front-end components.

User Interface (UI) Testing

- **Objective**: Validate that the CRM application's UI is intuitive, responsive, and user-friendly.
- **Key Areas**:
  - **User Flow**: Test for smooth navigation across dashboards for admins, tenants, and customers.
  - **Responsive Design**: Ensure the application works seamlessly on different devices, like desktops, tablets, and mobiles.
  - **Error Messages**: Verify that error messages and validation warnings are clear and helpful to users.
- **Tools**: Use Cypress for UI and end-to-end testing, or BrowserStack for cross-browser compatibility testing.

End-to-End Testing and Validation

1. **End-to-End Workflow Testing:**
   - **Objective:** Simulate full donation cycles to ensure that workflows (from donation entry to recipient delivery) function seamlessly.
   - **Process:** Create test scenarios that cover complete processes, including donation creation, volunteer assignment, delivery scheduling, and feedback loops.

- **Validation Criteria:** Validate that each step in the workflow is accurately executed, with updates in real-time and all data flowing through correctly.

2. **User Acceptance Testing (UAT):**
   - **Objective**: Validate that the CRM application meets user requirements and is ready for deployment.
   - **Key Areas**:
     - **Stakeholder Involvement**: Conduct UAT sessions with mall managers, tenant representatives, and customer service teams to confirm requirements are met.
     - **Real-World Scenarios**: Run scenario-based testing to validate key workflows, such as tenant billing, customer loyalty updates, and event management.
     - **Feedback and Sign-Off**: Gather final feedback and get sign-off from key stakeholders before deploying the application.
   - **Process**: Create UAT scripts based on business scenarios, and ensure thorough testing by all key users.

3. **Performance Testing:**
   - **Objective**: Assess the application's performance under various conditions, including heavy loads.
   - **Key Areas**:
     - **Load Testing**: Evaluate system behavior with a high number of concurrent users, especially during mall events.
     - **Stress Testing**: Test the CRM's resilience under extreme conditions, like spikes in visitor data uploads.
     - **Response Time Measurement**: Track response times to ensure the system performs well within acceptable limits.
   - **Tools**: J Meter, Load Runner, or Gatling for stress and load testing.

This testing and validation approach helps ensure a reliable, high-quality Salesforce solution that meets functional, performance, and user satisfaction standards. By covering unit testing, UI testing, and full workflow validations, the solution will be fully ready for deployment with minimal risk of issues post-launch.

5. Key Scenarios Addressed by Salesforce in the Implementation Project

Here are nine key scenarios typically addressed by Salesforce in an implementation project, specifically tailored for a CRM application to manage a mall. These scenarios cover various aspects of mall management, including tenant relationships, customer engagement, event management, and operational efficiency.

Scenario 1: Tenant Relationship Management

- **Objective**: Manage relationships with tenants, track their contracts, and handle tenant support requests.

- **Scenario**: Mall administrators can view tenant profiles, track lease agreements, and manage contract renewals. When a tenant has a question or issue, they can log a case, which is assigned to the relevant support team. Salesforce's case management workflows help ensure timely resolution and maintain tenant satisfaction.

Scenario 2: Customer Relationship and Loyalty Management

Use Case: Volunteers need to be matched with donation pickups based on location, availability, and current task load to ensure efficiency.

Solution: Using Salesforce Flow and custom business logic, the system automatically assigns available volunteers to new donations based on predefined criteria such as location proximity, availability, and task capacity. Volunteers receive instant notifications through the Salesforce mobile app when a pickup is assigned, allowing them to confirm availability and access directions via GPS.

Scenario 3: Efficient Donation Pickup and Delivery Tracking

Use Case: Coordinators need real-time insights into the status of each donation from pickup through to delivery, ensuring that food reaches recipients in a timely manner.

Solution: Service Cloud's case management system and custom Donation and Delivery objects allow coordinators to track each donation in real time. Case status updates (e.g., "Pending Pickup," "In Transit," "Delivered") provide transparency at every stage, helping coordinators monitor progress and reassign tasks as needed. The Volunteer Dashboard provides visibility into ongoing tasks, enabling volunteers to update statuses directly from the mobile app.

Scenario 4: Recipient Needs Tracking and Distribution Scheduling

Use Case: Organizations need to manage and record food distributions to recipients, including household needs and preferences, to ensure fair and equitable distribution.

Solution: Salesforce stores recipient information in the Recipient Profile, including dietary requirements, household size, and food preferences. Coordinators can view recipient history and tailor distributions based on specific needs. Distribution scheduling is streamlined by linking donations to recipients, ensuring that food is distributed promptly and according to preferences.

Scenario 5: Real-Time Notifications and Communication

Use Case: Volunteers, donors, and coordinators need timely updates and reminders to coordinate donations, pickups, and deliveries effectively.

Solution: Salesforce's notification workflows send real-time alerts for new pickups, delivery assignments, and urgent donations that require immediate attention. Volunteers receive reminders before scheduled pickups and can confirm task completion directly from the mobile app. Donors are also notified once their contributions are picked up, providing them with confirmation and closing the feedback loop.

Scenario 6: Impact Tracking and Reporting for Stakeholders

Use Case: The organization needs to monitor and report on food redistribution impact, volunteer engagement, and donor participation to demonstrate the project's effectiveness.

Solution: Salesforce Reports and Dashboards provide a visual representation of the program's impact. Dashboards track metrics like food distributed by category, volunteer engagement hours, donor retention, and peak donation times. These reports help stakeholders understand the program's impact on food waste reduction and community support, making it easy to communicate results to sponsors, partners, and the public.

Scenario 7: Volunteer Application and Approval Process

Use Case: New volunteers need an easy way to apply and become approved for participation, with minimal administrative overhead.

Solution: Salesforce's automated approval process manages new volunteer applications, streamlining the onboarding process. Prospective volunteers submit their applications through the platform, and the system routes these applications for manager review and approval. This automation allows coordinators to quickly expand the volunteer base without manual intervention.

Scenario 8: Managing High-Priority and Perishable Donations

Use Case: Certain food items may have shorter shelf lives or higher priority for distribution and require expedited handling.

Solution: Salesforce's business rules and approval workflows prioritize high-risk or perishable donations, routing them for immediate volunteer assignment. The "Donation Quality Check" process sends these donations for manager review, ensuring swift action to prevent food spoilage. Volunteers are alerted of these high-priority tasks in real time, enabling them to expedite the pickup and delivery.

Scenario 9: Organizing Community Outreach Events

Use Case: The organization wants to host community events to promote food security awareness, increase donations, and engage volunteers.

Solution: Salesforce's Event object tracks community events, including scheduling, location, sponsorship, and participant numbers. This feature allows coordinators to organize and manage events, track volunteer and donor participation, and gather insights for future event planning. Reports on event outcomes can be shared with stakeholders to highlight the organization's community involvement and outreach efforts.

Summary

Each scenario addressed by Salesforce helps to create an efficient, reliable, and scalable solution for managing food donations, volunteer coordination, and food distribution. The system's ability to automate routine processes, track detailed data, and provide real-time notifications ensures that the project is well-equipped to meet its mission of reducing food waste and supporting those in need.

6. Conclusion

The Salesforce implementation has created a seamless, scalable solution for managing food donations and distribution, connecting donors, volunteers, and recipients to reduce food waste and support those in need. Key achievements include:

- **Efficient Donation & Volunteer Management:** Streamlined donor contributions and automated volunteer assignments based on location and availability.
- **Real-Time Tracking & Notifications:** Enabled real-time tracking and updates, ensuring transparency in the donation process.
- **Impact Reporting:** Developed dashboards and reports to track distribution, volunteer engagement, and donor retention.
- **Enhanced Community Engagement:** Supported volunteer onboarding and organized community events to increase participation.

This project effectively meets its goals of reducing food waste and alleviating hunger, serving as a replicable model for similar initiatives.