Project Title: Last Mile Delivery CRM – Optimizing Routes & Customer Experience

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Problem Statement

Delivery-based businesses (e-commerce, groceries, food, courier) face challenges in ensuring **on-time deliveries, optimized routes, and customer satisfaction**. Delivery agents are often assigned manually, leading to delays and overlapping tasks. Customers may not receive **real-time updates** on order status, estimated delivery times, or delays, resulting in frustration. Managers lack visibility into **route efficiency, agent performance, and delivery costs**.

Without a centralized CRM, **orders, routes, agents, and customer communication are handled separately**, causing inefficiencies, higher fuel costs, and poor customer experiences.

Proposed Salesforce Solution

- Customers can track deliveries in real time through automated notifications (SMS/Email).

- Orders are auto-assigned to the **nearest available agent** using Salesforce Flows & Google Maps API.

- Route optimization reduces travel time and fuel consumption.

- Delivery agents update order status (Picked Up, Out for Delivery, Delivered, Failed) directly in Salesforce.

- Managers view **dashboards** showing:

  o On-time vs delayed deliveries.

  o Delivery cost per route.

  o Agent performance metrics.

- Customer feedback is captured and stored in the CRM to improve satisfaction.

PHASE 1: PROBLEM UNDERSTANDING & INDUSTRY ANALYSIS

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1. REQUIREMENT GATHERING

Goal: Understand the pain points of delivery businesses.

- Talk to delivery managers, agents, customer support, and customers.

- Identify issues like delayed deliveries, manual route planning, and lack of real-time updates.

- Collect examples of what the CRM should handle:

  o Track delivery agents and vehicles.

  o Prevent overlapping assignments.

  o Provide real-time tracking and notifications.

  o Generate performance and satisfaction reports.

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2. STAKEHOLDER ANALYSIS

Goal: Identify users and beneficiaries of the CRM.

Internal Users:

- **Delivery Agents:** Need assigned orders, route details, and ability to update status.

- **Managers:** Want reports, route optimization, and agent monitoring.

- **Customer Support:** Handles missed deliveries, complaints, and escalations.

External Users:

- **Customers:** Expect real-time tracking, delivery updates, and feedback options.

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3. BUSINESS PROCESS MAPPING

Goal: Map the existing workflow and how Salesforce improves it.

Current Challenges:

- Manual order assignment to agents.

- Routes are planned inefficiently.

- Customers don't get timely updates.

- Difficult to track agent performance.

How Salesforce Helps:

- Automates order assignment based on location and capacity.

- Suggests optimized routes via Google Maps API.

- Sends real-time delivery notifications.

- Provides centralized dashboards for monitoring.

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4. INDUSTRY USE CASE ANALYSIS

Goal: Tailor CRM to logistics/delivery industry.

Last Mile Delivery Needs:

- Fast & cost-efficient delivery.

- Real-time tracking for customers.

- Balanced agent workloads.

- On-time performance monitoring.

Salesforce Solutions:

- Custom objects for Orders, Vehicles, Routes.

- Flows for auto-assigning deliveries.

- Service Cloud for customer issues.

- Dashboards to track efficiency and satisfaction.

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5. APPEXCHANGE EXPLORATION

Goal: Check existing apps for delivery management.

Helpful App Types:

- Route optimization and GPS tracking.

- SMS/WhatsApp notification apps.

- Feedback and survey collection apps.

Action Steps:

- Explore logistics and delivery-related apps on AppExchange.

- Evaluate integration with Sales/Service Cloud.

- Decide whether to use apps or custom development for delivery automation.