

Project Title

EcoCart Logistics CRM – Streamlining E-commerce Deliveries with Salesforce

Problem Statement

In the fast-growing e-commerce sector, customers often lack real-time visibility into their deliveries, leading to frustration and frequent support requests. Delivery agents face challenges in updating shipment statuses promptly, and managers struggle to monitor delivery performance across regions. The absence of automation results in delayed communication, overlapping assignments, and poor customer experience.

To address this, EcoCart Logistics CRM will provide a centralized Salesforce-based solution to:

- Track orders, shipments, and delivery status in real-time.
- Automate status updates and customer notifications.
- Ensure managers have dashboards to monitor delivery KPIs and identify delays quickly.

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand what we're building and why.

1. Requirement Gathering

- Talk to stakeholders (delivery managers, logistics agents, customers, support team).
- Example requirements:
 - Track all orders with shipment and delivery status.
 - Allow customers to check real-time delivery updates.
 - Prevent delays or missed deliveries through automated alerts.
 - Generate performance and revenue reports for managers.

2. Stakeholder Analysis

- **Admin** (you, managing system setup and configurations).
- **Logistics Agents** (update shipment status, manage deliveries).
- **Manager** (monitors delivery performance, approves exceptions/delays).
- **Customer Support** (handles issues, reschedules, or cancellations).
- **Customers** (track their orders and receive notifications).

3. Business Process Mapping

- Flow:

Customer places order → System assigns shipment → Agent updates delivery status
→ Exception/Delay approval (if needed) → Customer receives real-time notification.

4. Industry-specific Use Case Analysis

- In the logistics industry, delivery speed, transparency, and error-free updates are crucial.
- Need to track orders, monitor delays, notify customers proactively, and provide performance dashboards.

5. AppExchange Exploration

- Search for "Logistics/Delivery Tracking" apps. While options exist, we'll build a **custom, simplified solution** in Salesforce to learn end-to-end CRM implementation.