

Phase 1 – Problem Understanding & Industry Analysis

Project Title

Retail CRM – Customer, Order, and Service Management System

Problem Statement

A retail company is currently managing customer orders, service requests, and marketing campaigns using fragmented tools such as spreadsheets, email threads, and third-party applications.

This results in delays, data silos, inefficient workflows, poor customer engagement, and lack of business insights.

A Salesforce CRM implementation will address these issues by centralizing all customer and order data, automating workflows, enabling targeted marketing, and providing real-time dashboards for data-driven decision-making.

Objectives

The Salesforce Retail CRM will:

- Automate customer onboarding, order tracking, and returns management.
- Centralize customer, product, and service data into a single platform.
- Implement personalized marketing campaigns based on customer behavior.
- Provide real-time dashboards and reports for management to track sales, service, and customer loyalty.
- Improve customer communication through automated notifications, reminders, and service updates.
- Ensure secure access control, data backups, and compliance.

Stakeholder Analysis

- Customers: Need simple order tracking, timely service, personalized offers.
- Sales Team: Needs unified view of customers, order history, and opportunities.
- Service Agents: Need easy access to complaints, returns, and customer issues.
- Marketing Team: Needs tools for targeted campaigns and customer segmentation.
- Management: Needs real-time dashboards on sales, top products, and service metrics.
- IT/Admin: Needs data security, user management, and system reliability.

Business Process Mapping

Current Process (Before Salesforce):

1. Customer places an order on the website.
2. Order details are stored in a spreadsheet.

3. Service complaints/returns are logged manually via email.
4. Marketing campaigns are sent as bulk emails without personalization.
5. Managers review sales trends manually at the end of the month.

Proposed Process (After Salesforce Implementation):

1. Orders are automatically captured as Salesforce records (via integration or import).
2. Workflows/Flows assign service requests to agents and send automated order confirmations.
3. Leads & Opportunities are tracked for upselling and cross-selling.
4. Marketing campaigns are personalized based on purchase history using segmentation.
5. Managers view real-time dashboards for sales, service SLAs, and customer loyalty.

Industry-Specific Use Case Analysis

- Customer 360° View: Maintain complete customer profiles with purchase history and service records.
- Order & Return Management: Track orders, manage returns, and automate refunds.
- Loyalty Programs: Group customers into cohorts (e.g., Gold, Silver, Bronze) for targeted offers.
- Marketing Automation: Send personalized promotions based on buying behavior.
- Service Management: Automate case creation, assignment, and resolution workflows.
- Inventory Insights (Optional): Track product demand trends using dashboards.

AppExchange Exploration

- Formstack/FormAssembly → For online order/feedback forms integrated with Salesforce.
- Conga/DocuSign → For generating invoices, receipts, and service agreements.
- Twilio/WhatsApp Integration → For sending real-time order updates and promotional offers.
- Marketing Cloud/Third-Party Marketing Apps → For advanced campaign management.

Conclusion

Phase 1 establishes the foundation for the Retail CRM project by clearly identifying the problem, defining objectives, analyzing stakeholders, and mapping current vs. future processes. This ensures upcoming phases—Org Setup, Data Modeling, Automation, Apex Development, UI Customization, Integrations, Data Management, Reporting, and Final Presentation—will directly address real-world retail challenges while showcasing Salesforce Admin and Developer capabilities.