

## Ideation Phase

### Define the Problem Statements

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Name	Motapothu Hima Sai Sindhu
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#### Define the Problem Statement:

**Defining problem statements** is a critical step in the ideation phase where the team clearly identifies the core challenges the project aims to address. This process transforms broad observations and business needs into specific, actionable issues that the solution must solve.

In the **HandsMen Threads** project, the goal was to elevate men’s fashion through technology. To do that effectively, the team needed to understand the pain points faced by customers, sales teams, and inventory managers in the fashion retail industry. Defining problem statements helped the team focus their efforts on areas with the highest impact.

#### 1. Customer Experience Problem

##### Problem Statement:

How can we personalize the customer experience in men’s fashion using technology to increase engagement, satisfaction, and loyalty?

##### Description:

In today’s fashion market, men often face a generic, one-size-fits-all shopping experience. There's little personalization in communication, product recommendations, or recognition of customer loyalty. This lack of engagement leads to a weak brand connection and poor customer retention.

##### Pain Points Identified:

- No segmentation of customers (e.g., loyal vs. new)
- No personalized offers or follow-ups
- Inconsistent communication after purchases

##### Solution Direction:

Use Salesforce to:

- Track customer purchase behavior
- Segment customers into loyalty tiers (Gold, Silver, Bronze)
- Send automated, personalized emails using flows

## **2. Order Management Problem**

### **Problem Statement:**

How can we automate and validate the order process to reduce errors, speed up confirmations, and ensure a smooth customer journey?

### **Description:**

Manual order processes are prone to delays and errors—such as incorrect quantities, invalid amounts, or missed confirmations. This creates dissatisfaction among customers and inefficiencies for staff.

### **Pain Points Identified:**

- Orders being saved with missing or invalid data
- Manual confirmation steps delaying processing
- No automated follow-up for confirmed orders

### **Solution Direction:**

Implement:

- Validation rules to ensure correct quantity and amount
- Record-triggered flows to auto-send confirmation emails
- Auto-generated order numbers for tracking

## **3. Inventory Visibility Problem**

### **Problem Statement:**

How can we track and manage inventory levels in real-time to prevent out-of-stock or overstock situations?

### **Description:**

Ineffective inventory management results in stockouts or excessive holding of unsold items. This directly impacts sales and customer satisfaction.

### **Pain Points Identified:**

- No real-time alert system for low stock
- Manual updates to inventory levels
- Lack of restocking process automation

### **Solution Direction:**

Use Salesforce to:

- Monitor stock quantities through custom fields

- Trigger email alerts when inventory drops below thresholds
- Use batch jobs to automatically update/restock inventory

#### **4. Marketing Efficiency Problem**

##### **Problem Statement:**

How can we streamline and personalize marketing campaigns to reach the right customers with the right offers at the right time?

##### **Description:**

Traditional marketing efforts lack focus and personalization. Customers are often sent irrelevant promotions, reducing the effectiveness of campaigns and wasting resources.

##### **Pain Points Identified:**

- Generic email blasts with low conversion
- No way to track customer engagement with campaigns
- No automated follow-ups tied to customer behavior

##### **Solution Direction:**

Implement:

- Marketing\_Campaign\_\_c object with customer lookup
- Scheduled or triggered flows to launch campaigns
- Segmented targeting using loyalty levels

#### **5. Data Integration & Reporting Problem**

##### **Problem Statement:**

How can we centralize customer, product, and order data for actionable insights and effective decision-making?

##### **Description:**

Fragmented data across systems or spreadsheets limits the ability to analyze trends, track performance, or make informed decisions.

##### **Pain Points Identified:**

- Disconnected records for customers, products, and inventory
- Lack of unified dashboard or reporting tool
- Manual data extraction for analysis

**Solution Direction:**

Salesforce provides:

- Custom objects with lookup and master-detail relationships
- Reports and dashboards for real-time visibility
- Unified view of customer, order, and inventory data

**Conclusion:**

These detailed problem statements provided a strong foundation for:

- Designing custom objects (Customer, Product, Order, Inventory)
- Implementing smart flows and validation rules
- Automating routine tasks (emails, restocks, loyalty updates)
- Aligning the technical build with real-world retail challenges