**Art Gallery CRM**

**Phase 1: Discovery & Analysis Document**

**Problem Understanding & Industry Analysis**

**Objective:**   
Modern art galleries face challenges in managing exhibitions, tracking artwork sales, and engaging visitors meaningfully. Fragmented systems and manual processes hinder scalability, transparency, and personalized experiences.

**Industry Insights:**

* Galleries increasingly rely on digital tools for curation, sales, and visitor engagement.
* Provenance tracking and ethical sourcing are gaining importance.
* Hybrid exhibitions (physical + virtual) demand flexible CRM capabilities.
* Visitor data is underutilized for personalization and retention.

1. **Requirement Gathering**

**Functional Requirements:**

* Track artwork details, status, and history
* Manage exhibitions and link artworks to events
* Log visitor interactions and preferences
* Record and report artwork sales
* Automate follow-ups and feedback collection

**Non-Functional Requirements:**

* Scalable and secure data architecture
* Mobile-friendly visitor check-in and engagement
* Integration with payment gateways and external art databases
* Role-based access for curators, sales staff, and admins

1. **Stakeholder Analysis**

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| **Stakeholder** | **Role** | **Needs & Expectations** |
| Gallery Curator | Manages exhibitions | Easy scheduling, artwork curation tools |
| Sales Executive | Handles transactions | Quick access to inventory and buyer history |
| Visitor | Engages with gallery | Personalized experience, seamless check-in |
| Gallery Owner | Oversees operations | Dashboards, reports, ROI insights |
| IT/Admin | Maintains system | Secure, customizable, low-maintenance setup |

1. **Business Process Mapping**

**Current State (Manual):**

* Excel sheets for inventory
* Email-based visitor communication
* Paper-based feedback forms
* Limited visibility into sales trends

**Future State (CRM-Driven):**

* Centralized artwork and exhibition database
* Automated visitor engagement workflows
* Real-time sales tracking and reporting
* Feedback loop for curatorial decisions

1. **Industry-Specific Use Case Analysis**

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| **Use Case** | **Description** | **Salesforce Feature** |
| Exhibition Planning | Schedule and curate events | Campaigns, Custom Objects |
| Artwork Provenance Tracking | Log history and ownership | Custom Metadata, Files |
| Visitor Interest Segmentation | Group visitors by preferences | Reports, Tags, Flow |
| Artwork Sales Lifecycle | Quote to cash process | Opportunities, CPQ |
| Feedback Collection | Post-visit surveys and insights | Forms, Email Studio |

1. **AppExchange Exploration**

**Relevant Apps to Consider:**

* *ArtCloud Connector* – For syncing artwork listings
* *Sales Analytics Dashboards* – Prebuilt visualizations
* *Einstein Bots* – For visitor FAQs and engagement
* *Event Management Solutions* – RSVP and scheduling tools
* *Field Audit Trail* – For provenance and compliance tracking