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Projecttitle: Lease Management Salesforce Implementation Project

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1 project overview

A CRM (Customer Relationship Management) application to manage a mall is a software solution designed to improve interactions with customers, tenants, and other stakeholders, ultimately enhancing overall business operations and customer satisfaction. Here's an overview of how such an application could work:

1.CustomerManagement

Customer Profiles: Track detailed information about customers, including contact details, preferences, purchase history, and visit frequency.

Segmentation: Group customers based on , demographics, or interests for personalized marketing and promotions.

Communication Channels: Engage with customers via multiple channels like email, SMS, app notifications, and social media.

2.Tenant/StoreManagement

Tenant Profiles: Maintain records of all mall tenants, including store type, lease agreements, payment status, and contact details.

Lease Tracking: Keep track of lease expiration dates, renewals, and other contractual details to ensure smooth tenancy management.

Performance Monitoring: Collect sales data, foot traffic analytics, and customer feedback to assess each store's performance and offer targeted support.

3.MarketingandPromotions

Campaign Management: Plan and execute targeted marketing campaigns based on customer segmentation, such as special offers, seasonal promotions, or loyalty programs.

Event Management: Organize and track mall events, promotions, or sales with the ability to notify customers or tenants in real-time.

4.CustomerServiceandSupport

Helpdesk Integration: Provide a support portal for customers to ask questions, file complaints, or request assistance, with ticketing and tracking functionality.

Benefits:

Enhanced Customer Experience:

Personalized offers, targeted promotions, and timely customer service lead to greater satisfaction.

Improved Operational Efficiency:

 Streamline processes related to tenant management, lease renewals, and customer

engagement. Increased Revenue:

 By optimizing marketing strategies and tenant relations, the mall can drive more foot traffic and higher sales.

Data-Driven Decisions:

Use real-time data and analytics to make informed decisions on marketing, tenant management, and customer service .

2 objectives

Business goals:

The business goals of a CRM (Customer Relationship Management) application to manage a mall focus on improving customer satisfaction, enhancing operational efficiency, and maximizing revenue. Here are the key business goals:

1. Enhance Customer Experience

Personalized Engagement: Tailor interactions with customers based on their preferences, past purchases, and visit history, which improves satisfaction and loyalty channel Communication: Provide seamless communication across multiple channels (email, SMS, mobile app, social media) to ensure customers receive timely updates and promotions.

Customer Support: Offer efficient, responsive customer service, addressing concerns or inquiries quickly, leading to increased customer trust and retention.

2. Increase Customer Retention and Loyalty

Loyalty Programs: Implement and manage customer loyalty programs that incentivize repeat visits and purchases, enhancing lifetime customer value.

Targeted Promotions: Use customer segmentation to offer personalized discounts, events, or rewards that encourage return visits and higher spending.

Engagement Tracking: Track customer behaviour to identify high-value customers, creating

opportunities for more meaningful engagement. Specific outcome Key Deliverables:

Specific outcome

1. CUSTOMER DATABASE: A centralized repository for storing customer data, including contact information, shopping behaviour preferences, and transaction history.

2. Customer Segmentation: Tools for segmenting customers based on demographics, purchase patterns, and engagement, enabling targeted marketing and personalized services.

3. Marketing Campaigns: Integration for creating and managing personalized promotional campaigns, loyalty programs, and special offers tailored to specific customer groups.

4. Sales and Engagement Analytics: Dashboards and reports that track customer interactions, sales performance, foot traffic, and other key metrics.
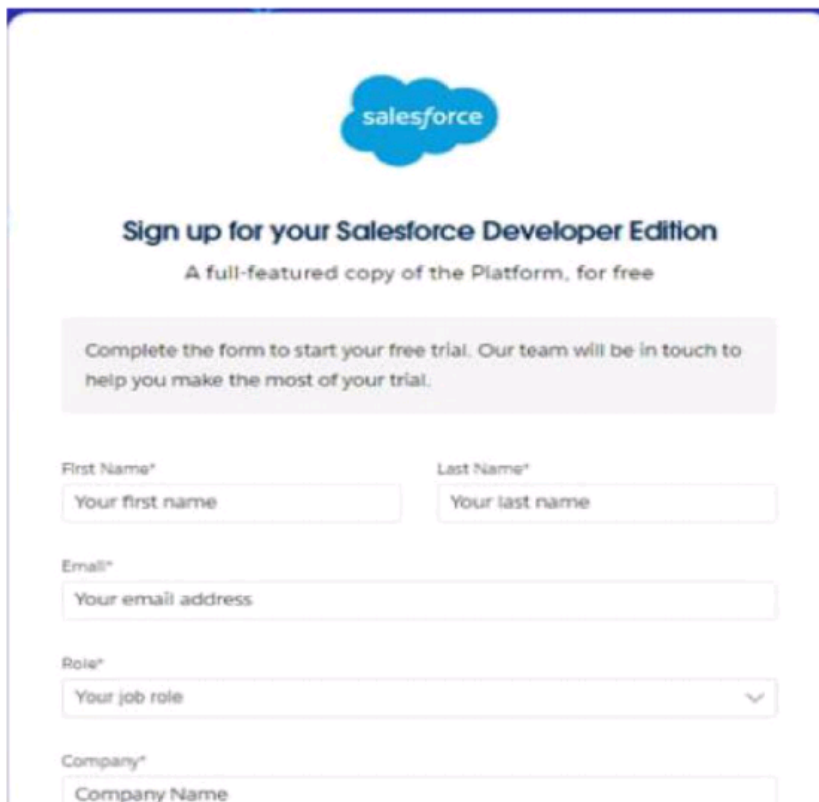
5. Customer Support & Feedback System: A module for tracking customer inquiries, complaints, feedback, and resolution status.

Outcomes:

- Enhanced Customer Experience: A personalized shopping experience by leveraging customer data, which leads to increased customer satisfaction and loyalty.

- Improved Marketing Effectiveness: Targeted marketing campaigns based on customer segments increase conversion rates and overall ROI on marketing spend.

- Increased Foot Traffic and Sales: Through personalized offers and promotions, the mall can attract more visitors, leading to higher in-store purchases.

Creating developer org in Salesforce: *enter details for sign up in Salesforce.*

3.Salesforce key features and concept utilized

1. Salesforce Sales Cloud

Customer Data Management: Sales Cloud allows you to capture and organize customer information (e.g., shoppers, tenants, and other stakeholders) in one place. This includes contact details, preferences, and purchasing behaviour.

Lead and Opportunity Management: Manage potential tenants (stores) and customer inquiries by tracking leads and opportunities, ensuring that sales teams can convert leads into tenants and enhance tenant relationships.

Sales Pipeline Tracking: Monitor the status of leasing opportunities and manage negotiations with tenants, ensuring transparency and follow-up.

2. Salesforce Service Cloud

Customer Support and Case Management: Manage customer complaints or feedback related to mall operations (e.g., maintenance issues, customer service inquiries, etc.). Service Cloud helps track and resolve issues efficiently.

Omni-Channel Support: Provide support across multiple channels (phone, email, chat, social media), enhancing customer experience for shoppers or tenants.

Knowledge Base: Build a self-service portal for tenants or shoppers, allowing them to access relevant FAQs, guides, and policies for quicker resolutions.

3. Salesforce Marketing Cloud

Customer Segmentation and Targeting: Use Marketing Cloud to segment customers based on their behaviour and demographics. For example, create campaigns tailored to specific shopper groups or tenants (e.g., exclusive offers for high-value customers or seasonal promotions for tenants).

Email Campaigns and Automation: Automate marketing campaigns to send targeted offers, event invitations, or newsletters to shoppers and tenants. This can be used to drive foot traffic or promote mall events.

Social Media Engagement: Track and engage with customerverion social media platforms. You can run targeted campaigns to drive awareness or collect feedback.

Account activation
Accountactivation:Gototheinboxoftheemailthatusedwhilesigningup.Clickonthe

Verifyaccounttoactivateyouraccount.
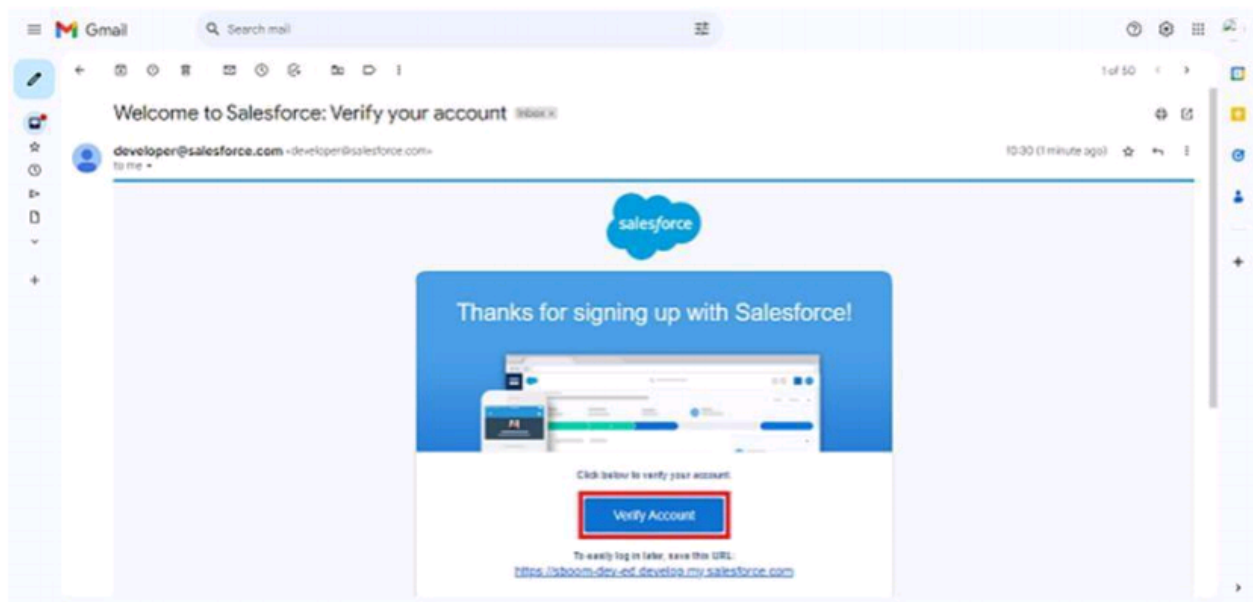
4. Detailed step to solution design

Develop documentation of design:

1. Introduction

This document outlines the design and architecture of the CRM (Customer Relationship Management) application for managing a mall. The CRM system will enable mall managers, stores, and tenants to effectively track customer interactions, enhance service offerings, improve marketing strategies, and foster better relationships with customers.

2. System Overview

The CRM application for mall management is designed to provide a unified platform for managing customer data, marketing campaigns, sales activities, customer service requests, and more. The system will be used by mall management teams, individual store managers, and customer service representatives.

Key Features:

Customer Database: Store and manage customer information, including contact details, shopping preferences, and history.

Marketing Campaign Management: Create, track, and analyze marketing campaigns targeting different customer segments.
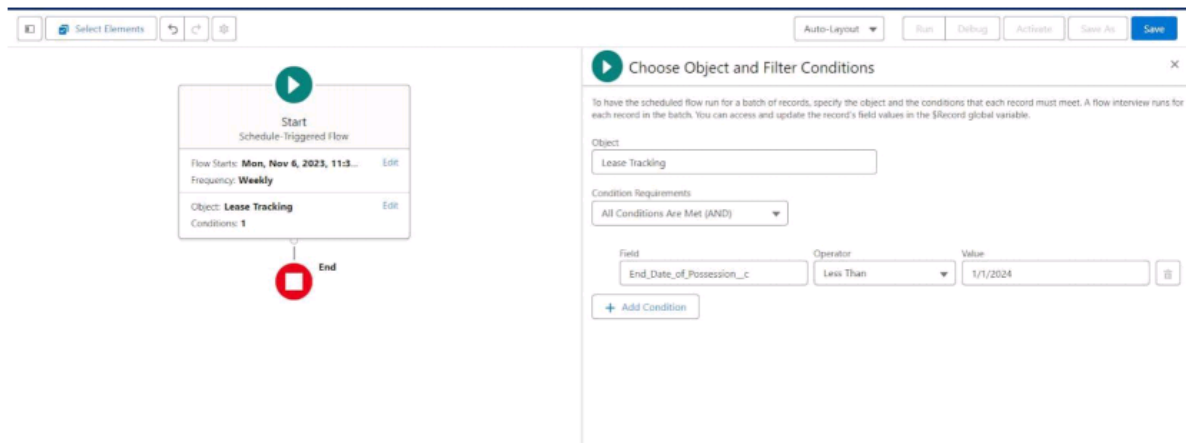
Encompassing data models:

The system will maintain the following entities and relationships:

- Customer

Attributes: Customer ID, First Name, Last Name, Email, Phone, Address, Date of Birth, Gender, Shopping Preferences, Loyalty Points, etc.

Relationships: One-to-many relationship with Sales, Events, and Campaigns.

- Sales

Attributes: Transaction ID, Date, Customer ID, Product(s) Purchased, Total Amount, Payment Method, Store ID, etc.

Relationships: Many-to-one relationship with Customer, many-to-one with Store.

- Store

Attributes: Store ID, Name, Category, Manager, Contact Details, etc.

Relationships: One-to-many relationship with Sales.

User interface and business logic:

User Interface (UI) Design

Overview

The UI of the CRM system for managing a mall should be user-friendly, responsive, and interactive, catering to various roles, such as mall administrators, store managers, customer service .

Scenario: A mall typically consists of multiple tenants (retailers, restaurants, entertainment).

Managing

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

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* Developer Name ⓘ

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Description ⓘ

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App Branding

Image ⓘ

Primary Color Hex Value
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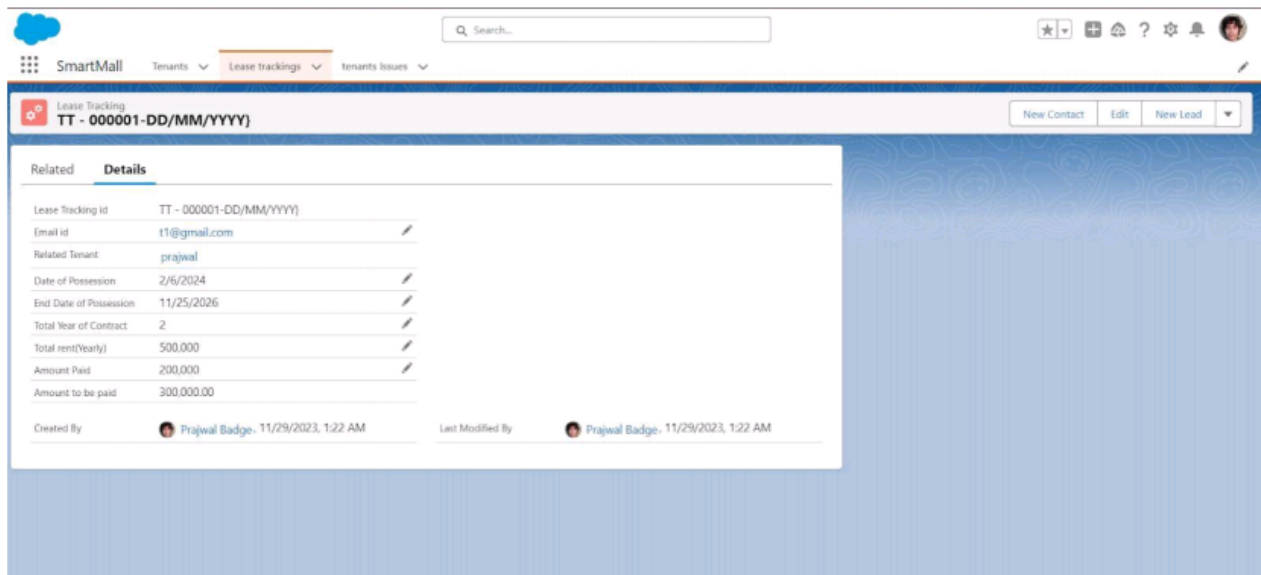[■ ▼] [#0070D2]

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Org Theme Options

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App Launcher Preview

relationships, tracking performance, and ensuring effective communication between mall

management and tenants is complex.

6. Event Management and Promotion

Scenario: Malls often host events (e.g., sales, exhibitions, festivals) to increase customer engagement. Coordinating these events can be complex, and tracking attendance and customer feedback is vital.

Solution: Salesforce can manage event registrations, track customer attendance, and measure the success of events through engagement metrics, helping mall management improve future event strategies.

7. Analytics and Insights

Scenario: Mall management requires insights into customer behavior, sales trends, and operational performance to make data-driven decisions.

Solution: Salesforce's analytics tools (e.g., Salesforce Einstein Analytics) can provide deep insights into customer data, sales trends, and mall performance, enabling managers to optimize marketing efforts, improve tenant relations, and increase profitability.

8. Mobile Access and Field Operations

Scenario: Mall staff, security, and maintenance teams need access to data and customer interactions while on the move.

targeted promotions. Additionally, CRM systems enable better communication between mall retailers, customers, and management, fostering loyalty and increasing sales. Overall, integrating a CRM system into mall management helps drive operational efficiency, boost customer satisfaction, and enhance business growth.
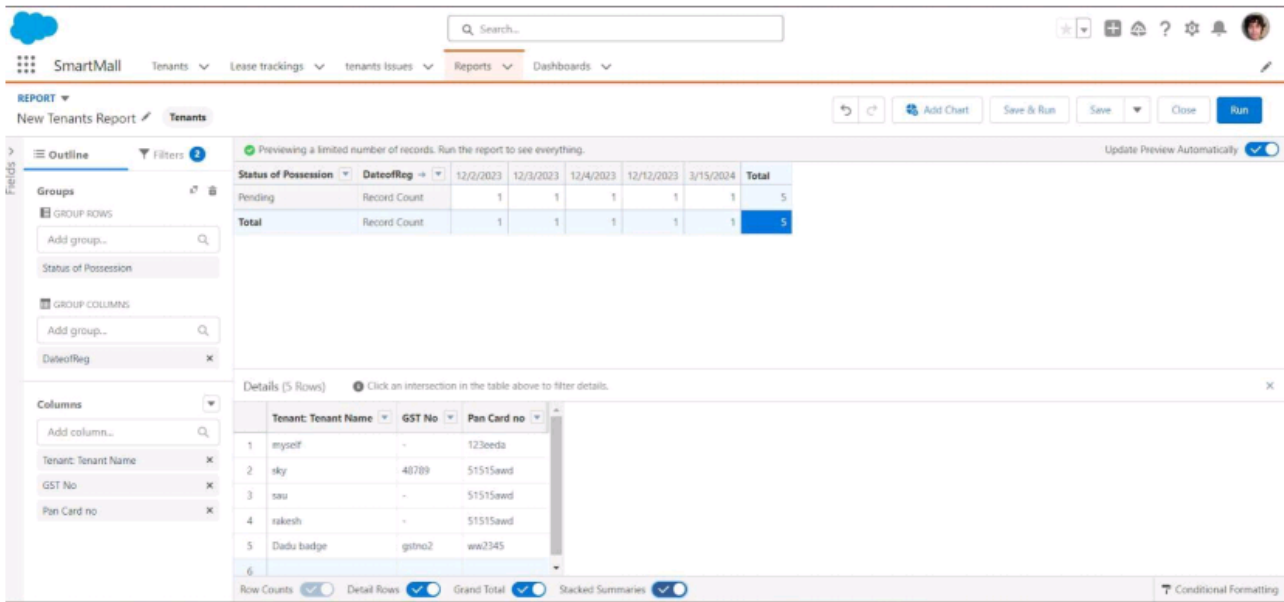
Solution: Salesforce's mobile capabilities allow mall employees to access real-time information, manage tasks, and update records from their smartphones, improving operational efficiency.

By implementing Salesforce in a mall management scenario, it becomes easier to manage customer relationships, streamline operations, and enhance the overall shopping experience for visitors, ultimately leading to better business outcomes.

7. conclusion

In conclusion, a CRM (Customer Relationship Management) application for managing a mall can significantly enhance customer engagement, streamline operations, and improve
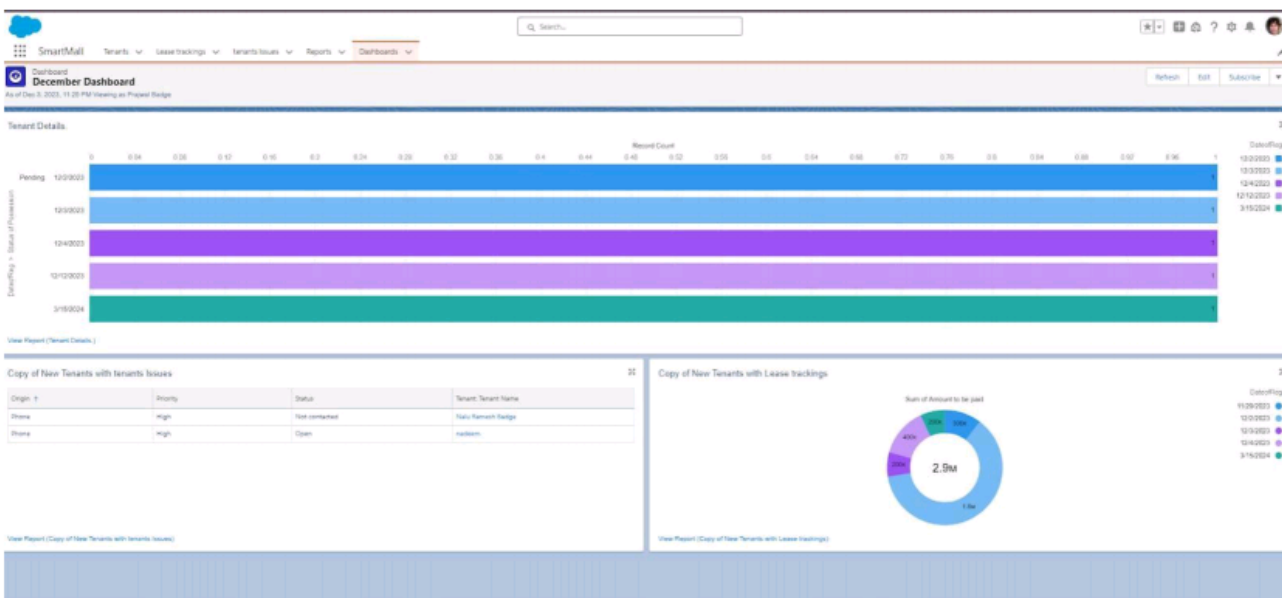
overall service delivery. By providing a centralized platform to track customer preferences, purchase histories, and feedback, mall management can deliver personalized experiences and