

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

ABSTRACT: HandsMen Threads CRM Documentation

This document outlines the **end-to-end implementation** of a **bespoke Salesforce Customer 360 solution** for HandsMen Threads, a luxury men's tailoring brand. The **strategic imperative** was to **optimize operational bandwidth**, **amplify customer lifetime value (CLV)**, and **mandate data governance** across the organizational matrix.

The solution is anchored by a **robust, scalable data architecture** leveraging five core custom objects: **Client (Customer)**, **Transaction (Order)**, **SKU (Product)**, **Stock (Inventory)**, and **Outreach (Marketing Campaign)**. We drove process efficiency by **automating mission-critical workflows** utilizing **declarative (Record-Triggered/Scheduled Flows, Email Alerts)** and **programmatic (Apex)** tools, focusing on **instantaneous transaction confirmation**, **dynamic loyalty tier calibration**, and **proactive just-in-time stock replenishment alerts**.

We **prioritized data hygiene** via **stringent validation logic** and fortified the system through a **granular, role-based security framework** tailored for the Sales, Fulfillment, and Engagement pods. Crucially, a **scheduled asynchronous batch process (Apex)** was deployed to **regularly recalibrate low-stock quantities**, ensuring inventory data is always **up-to-the-minute**.

This **transformative CRM deployment** is designed to **elevate the bespoke client journey** through **hyper-personalized communication**, **ensure operational excellence through radical automation**, and provide a **future-proof, scalable infrastructure** built on the Salesforce Platform, thus **positioning HandsMen Threads for exponential market penetration**.

PROJECT OBJECTIVES & KEY RESULTS (OKRs)

The **core objective** of this engagement is to **architect and deploy a mission-critical Salesforce CRM ecosystem** for HandsMen Threads. This initiative is **strategically aligned** to **de-risk operational bottlenecks**, **enforce a single source of truth (SSOT)**, and ultimately, **propel customer experience (CX) metrics** to best-in-class standards.

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Requirements to: Bulacan State University - College of Information Communication Technology (CICT) | Salesforce

By consolidating core functional areas **Client Relationship Management, Transaction Lifecycle, SKU Management, Inventory Fulfillment, and Digital Outreach** into a **centralized platform**, this project will achieve the following **Key Results (KRs)**:

- **Process Optimization: Maximize efficiency** by leveraging **intelligent automation (Flows/Apex)** to **instantaneously finalize order acknowledgments, dynamically update loyalty tiers, and issue just-in-time stock alerts.**
- **Data Governance & Quality: Establish non-negotiable data integrity** across the board by **mandating stringent validation protocols**, thereby **minimizing data drift and ensuring audit readiness.**
- **Real-Time Business Intelligence: Drive immediate business agility** by providing **real-time, granular visibility into inventory status and the full customer journey (360-degree view).**
- **Organizational Synergy: Enhance cross-functional collaboration and mitigate risk** through the deployment of a **robust, need-to-know, role-based access control (RBAC) model.**
- **Customer Lifetime Value (CLV) Amplification: Curate a bespoke client relationship** by enabling **hyper-personalized communication streams and differentiated loyalty program engagement.**

CORE TECHNOLOGY ARCHITECTURE

Salesforce Platform: The Digital Backbone

Salesforce is deployed as our **Strategic Customer 360 Platform**, serving as the **cloud-native, scalable engine** for all client interactions and operations. It provides a **harmonized blend of declarative, low-code functionalities** (e.g., Flows) and **robust, programmatic capabilities** (Apex) to **deliver a bespoke, enterprise-grade solution** without sacrificing **agility**.

Data Modeling & Schema Design

Component	Function	Strategic Imperative
Custom Objects	The database tables holding mission-critical business data . They are the foundational architecture for all processes.	Client__c, SKU__c, Transaction__c, Stock__c, Outreach__c
Tabs	The UI entry points that facilitate immediate user access and management of the custom object data within the platform.	Drive User Experience (UX) by simplifying navigation.
Custom App	A curated grouping of tabs and functionalities, providing a bespoke workspace optimized for specific user teams	Maximize Workflow Efficiency for each functional pod.

Access, Security & Governance

Component	Function	Strategic Imperative
Profiles	Defines the baseline capabilities for a user group: what they can see, do, and edit . The minimum viable access layer.	Mandates Core System Behavior and permissions.
Roles	Governs data visibility within the organizational hierarchy . Determines who sees whose records (e.g., Sales Manager sees their team's pipeline).	Enforces Data Segmentation and reporting structure.
Permission Sets	Provides additive permissions to users, allowing for agile, exception-based access without modifying the	Enables Granular Access Control and system agility.

	core Profile.	
Validation Rules	Non-negotiable data quality gates that enforce business rules upon data entry, blocking non-compliant data.	Guarantees Data Integrity and Audit Readiness.

Automation & Business Logic

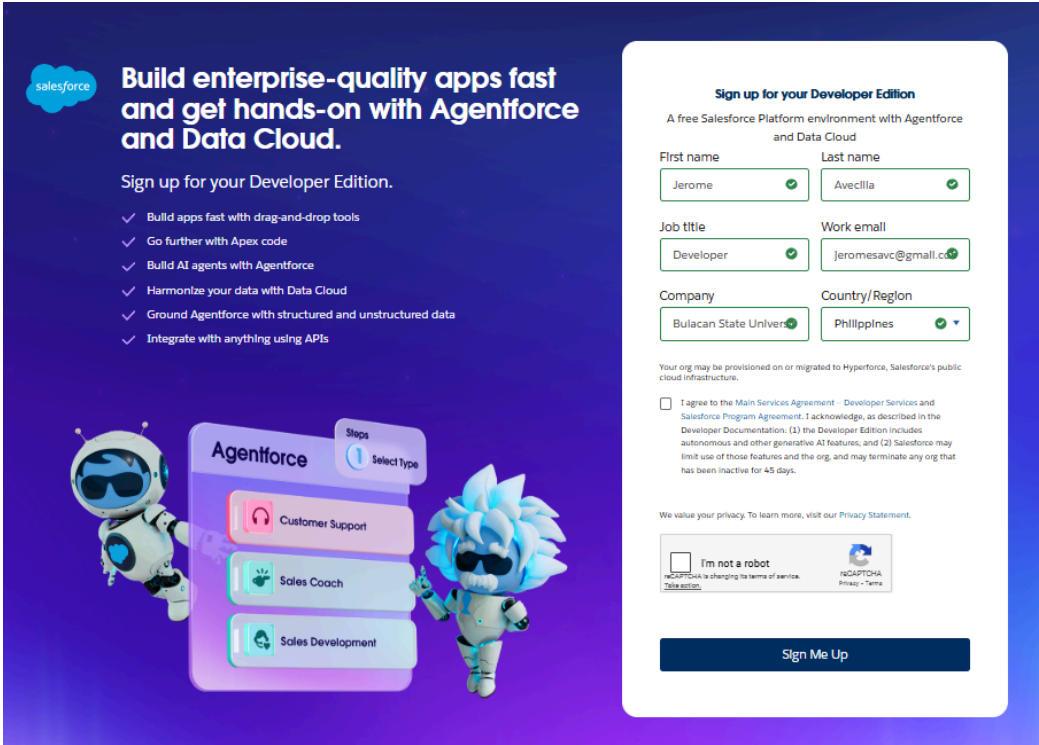
Component	Function	Strategic Imperative
Flows	The low-code automation engine. Used to orchestrate complex business processes, trigger notifications, and update records declaratively.	Drives Operational Efficiency and Scalability.
Apex (Programmatic)	Salesforce's proprietary object-oriented language. Utilized for complex, high-volume, or synchronous/asynchronous logic that cannot be met by Flows.	Enables Highly Customized, Mission-Critical Logic (e.g., Total_Amount__c recalculations, batch inventory updates).
Email Templates / Alerts	Standardized, on-brand communication assets used to automatically trigger personalized outreach (e.g., Instant Confirmation upon transaction).	Amplifies Customer Engagement and provides instant service delivery.

INFRASTRUCTURE ACTIVATION & DATA ARCHITECTURE BLUEPRINT

1. Developer Environment Provisioning (Go-Live Readiness)

The initial phase zeroed in on establishing the foundational digital sandbox.

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>
- The account was verified, password set, and access was granted to the Salesforce Setup page.

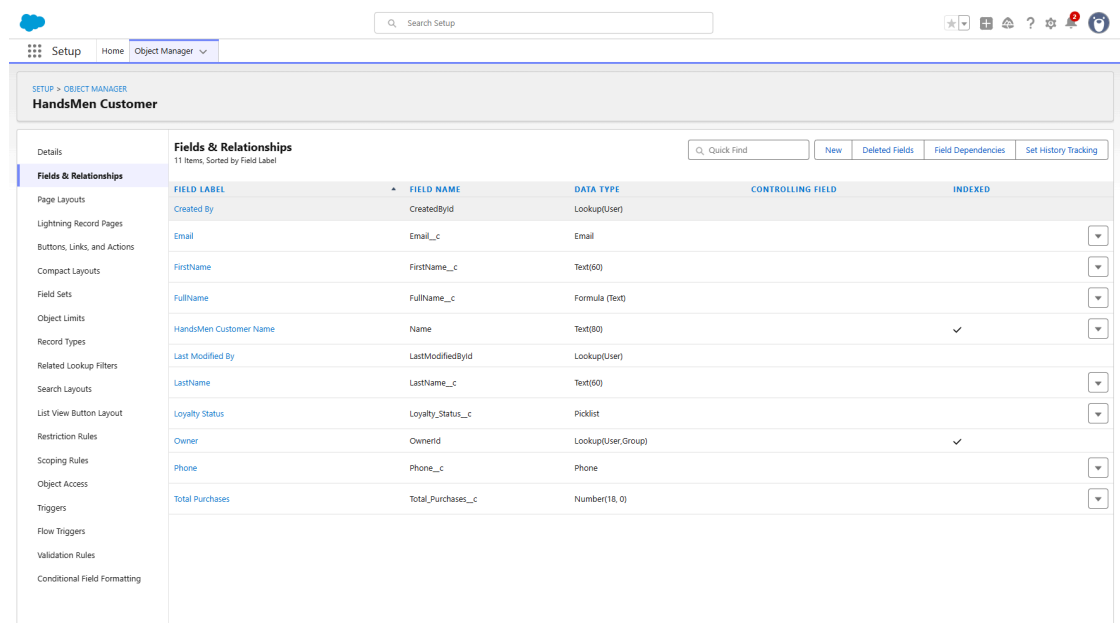


2. High-Impact Custom Data Modeling (Schema Lock-Down)

The project's **data integrity** hinges on a **scalable, normalized schema**. Five **business-critical custom objects** were created to serve as the **single source of truth (SSOT)** for HandsMen Threads.

Custom Object	Strategic Data Payload	Value Proposition
HandsMen Client	Client demographics, contact protocols (Email, Phone), Dynamic Loyalty Status .	Amplifies CLV through segmented personalization.
HandsMen SKU	Product catalog data, Standard Costing (Price) , Current Stock Volume .	Enables Real-Time Pricing and product tracking.
HandsMen Transaction	Purchase history, Order Status , Quantity	Optimizes Fulfillment Logistics and sales

	breakdown.	reporting.
Stock Fulfillment	Warehouse Location, Inventory Quantity Tracking.	Ensures Just-in-Time Replenishment capability.
Digital Outreach	Campaign scheduling, performance metrics, target segmentation.	Drives ROI by linking marketing effort to sales results.



3. Customized User Interface Deployment (Console Provisioning)

A bespoke **Lightning Experience Application** was engineered to provide a **streamlined, role-specific workspace** for HandsMen Threads personnel. This initiative was key to maximizing **user adoption and workflow efficiency**.

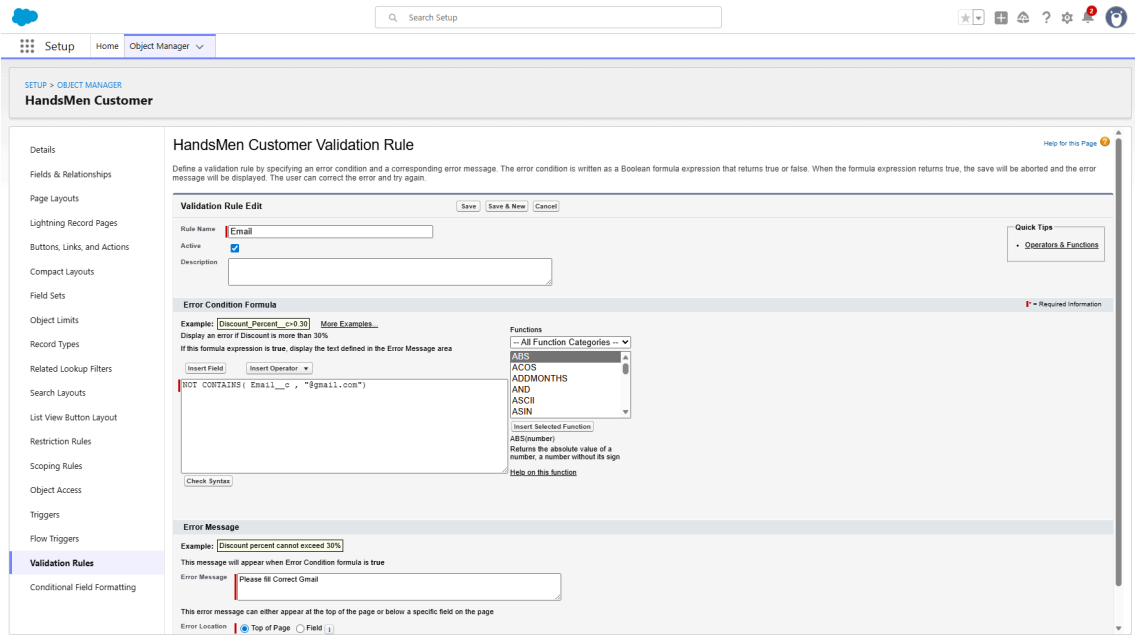
- **Application Name: HandsMen Threads Console**
- **Strategic Functionality:** The App consolidates all **mission-critical navigation elements** (Tabs for Client, Order, SKU, Stock, Outreach) alongside **Business Intelligence Dashboards (Reports)**.
- **Initial Rollout:** The application was initially assigned to the **System Administrator Profile** for **UAT (User Acceptance Testing)** and sign-off, ensuring the **digital experience aligns** with the strategic blueprint before broader deployment.
- **Value Add:** This approach **mitigates context switching** and provides users with a **customized cockpit** focused solely on their **operational imperatives**.

4. Data Quality & Governance Mandate (Validation Rule Enforcement)

To enforce a **Single Source of Truth (SSOT)** and prevent **data hygiene degradation**, rigorous **Validation Rules** were implemented across key transactional and client objects. This ensures that all data entered **complies**

with core business logic.

Object	Validation Logic	Strategic Rationale
HandsMen Transaction (Order)	Prevents record creation where the Total_Amount__c field is less than or equal to zero (\$0).	Amplifies CLV through segmented personalization.
HandsMen Client (Customer)	Strict email format control requiring the inclusion of @gmail.com (as per initial specification).	Enables Real-Time Pricing and product tracking.



5. Access Control Deployment (Roles & Profiles Blueprint)

We established a **granular security model** to ensure data visibility and platform functions are **role-specific**, mitigating internal risk and promoting **operational focus**.

- **Custom Profile Creation:** The baseline **Standard User Profile** was cloned and configured as "**Platform 1**". This profile was then **permissioned** to allow required access to the custom objects (Client, Order, etc.).
- **Organizational Hierarchy (Roles):** We mapped key departmental functions into a role hierarchy for data visibility control:
 - **Sales Manager**
 - **Inventory Manager**

- Marketing Team

6. User Onboarding & Access Assignment

New users were provisioned and immediately assigned their **designated roles and profiles to enforce the access architecture** from day one.

- **Role-Based Access (RBA) Examples:**
 - **Niklaus Mikaelson: Assigned Sales Manager Role.**
 - **Kol Mikaelson: Assigned Inventory Manager Role.**
- **Strategic Outcome:** This **role-based assignment** is key to **controlling data exposure** and ensuring users only interact with processes and data relevant to their **core responsibilities**.

7. Automated Communication & Service Delivery (Email Assets)

We developed a set of **standardized, high-impact email assets** paired with **automatic alerts** to elevate both the client journey and internal efficiency. These templates are the **foundation** for hyper-personalized, timely communication.

Email Template	Trigger Event	Strategic Purpose
Transaction Confirmation	Order Status changes to Confirmed .	Ensures Instant Client Acknowledgment and reduces follow-up volume.
Inventory Warning	Stock quantity falls below the Critical Threshold (5 units) .	Drives Proactive Fulfillment and prevents stock-outs.
Loyalty Status Update	Client's loyalty tier is upgraded or modified .	Fosters Client Retention and acknowledges high-value behavior.