MACK Stores Salesforce CRM Project

Phase 1: Problem Understanding & Industry Analysis

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1. Requirement Gathering

Gather requirements from all major stakeholders involved in MACK Stores' operations. These cover areas such as customer management, sales tracking, inventory management, loyalty program, marketing, and performance evaluation.

- **Store Managers**: Need dashboards for store-wise sales, inventory, and staff performance.

- **Sales Associates (Cashiers/Executives)**: Need quick access to customer records, loyalty points, and product availability during checkout.

- **Inventory Managers**: Need visibility into stock levels, low-stock alerts, and supplier replenishment cycles.

- **Marketing Team**: Need customer segmentation for running SMS/Email campaigns and tracking promotions.

- **Senior Management (Directors/Executives)**: Need consolidated reports and analytics across all MACK Stores to drive strategic decisions.

- **Customers (Loyalty Members & Shoppers)**: Expect faster billing, accurate loyalty points, and personalized offers.

2. Stakeholder Analysis

Define the key stakeholders and their core needs:

- **Store Managers**: Require detailed store-wise performance reports, inventory health tracking, and staff performance metrics to make informed decisions.

- **Sales Associates**: Need an easy-to-use system for quick customer checkout, loyalty point management, and product availability checks.

- **Inventory Managers**: Need real-time insights into stock levels across multiple stores, with alerts for low stock or overstocked products.

- **Marketing Team**: Need the ability to segment customers based on their shopping patterns and send targeted promotions or campaigns (SMS, email, etc.).

- **Senior Management**: Require centralized dashboards with real-time sales and inventory data across all stores for faster decision-making.

- **Customers**: Expect personalized offers, easy access to loyalty points, and a smooth shopping experience.

3. Business Process Mapping

Examine existing workflows and identify how Salesforce can improve them.

- **Current Process**:

  - Customer data and loyalty details are scattered across multiple systems.

  - Inventory tracking is manual and decentralized across stores.

  - Customer promotions are generic, lacking personalization.

  - Sales reports and analytics are slow and lack real-time insights, affecting decision-making.

  - Inventory replenishment and order processing are not integrated, leading to operational inefficiencies.

- **Proposed Process**:

  - Implement Salesforce CRM to centralize customer data, including purchase history and loyalty points.

  - Automate inventory tracking and updates across all stores to avoid stockouts or overstocking.

  - Enable personalized promotions and offers based on customer segmentation using Salesforce's Marketing Cloud.

○ Provide real-time dashboards and reporting for better decision-making for store managers and executives.

○ Integrate point-of-sale (POS) systems with Salesforce for faster billing and order processing.

4. Industry-Specific Use Case Analysis

Key challenges in the retail industry include:

- **Scattered Customer Data**: Difficulty in tracking customer purchase history and loyalty details across stores.

- **Manual Inventory Tracking**: Lack of real-time visibility into stock levels, leading to potential stockouts and overstocking.

- **Limited Customer Engagement**: Generic promotions that don't cater to individual customer preferences.

- **Slow Decision-Making**: No real-time insights into sales and inventory data, affecting strategic decisions.

- **Operational Inefficiency**: Lack of integration between sales, inventory, and customer loyalty systems.

Salesforce Use Cases:

- **Centralized Customer 360 Profiles**: Consolidating customer data, purchase history, and loyalty points into a single view.

- **Automated Loyalty Programs**: Managing loyalty points, rewards, and promotions automatically.

- **Real-time Inventory Management**: Tracking product stock across stores and sending alerts for replenishment.

- **Sales and Marketing Dashboards**: Delivering real-time insights into sales performance and customer engagement.

- **Custom Reports**: Generating detailed reports for inventory, sales, and customer behavior analysis.

5. AppExchange Exploration

Investigate Salesforce AppExchange and marketplace apps to extend functionality:

- **Inventory Management Solutions**: Apps for real-time tracking of stock levels and automated replenishment.

- **Customer Communication Tools**: Apps for sending personalized SMS, email campaigns, and promotional notifications.

- **Marketing Automation**: Solutions to help run targeted campaigns, loyalty programs, and promotional offers.

- **Order Management Systems (OMS)**: Apps for streamlining order processing, invoicing, and customer data integration with POS systems.