

Abstract: This document is a combination of specification and implementation report for the business the exchequer which was facing major challenge to operate and get abruptly closed. This report captures the complete issue right from the understanding business, identifying loopholes that cause a well settled to seize its business because it was unable to sustain after COVID. The specification report tells the overall base that includes analyzing possible competition. Also, the implementation report focusses on the study and analysis of the problem to find a solution and better implementation so that business can start again with a possibility of growth.

Keywords: Competition, Restaurant, Salesforce CRM, Dashboard

Part 1: Project Specification Report

1. Background Information & Business Introduction

The Exchequer Wine Bar was a highly regarded, famous and well-established Spanish tapas and wine bar in the centre of Ranelagh, Dublin 6. Its prime location with a vibrant dining scene and urban clientele, fuelled its growth and success for almost 15 years. Over this duration, the restaurant built a loyal and strong customer base, not only locally but customers across Dublin County and beyond. Its speciality in Spanish cuisine, wonderful atmosphere and a curated selection of wines guaranteed its strong reputation.

However, despite all this, it had been facing a consistent decline for the past 3-4 years, mainly after Covid pandemic struck, forcing its owners to stop operation on 12th February, 2025 [2]. The post-pandemic economic slowdown, increased VAT on hospitality services imposed by the government and shift in consumer behaviour were among a range of issues that led to its closure [3].



Fig. 1. The Exchequer Actual Image

Key Pain Points:

Some of the key reasons identified for the closure of Exchequer are:

- a) **Cost pressures:** Increasing operational costs, like inflation in prices of food, labour and energy, combined with the higher VAT, decreased the profits.
- b) **Revenue imbalance:** There was strong sales and performance on weekends, but this could not be replicated on the weekdays, which could have helped the business to compensate for the increased operational costs.
- c) **Gaps in Digitalization** and staying ahead: Except the presence of an online website, the restaurant did not utilize the immense growth possibilities digitization offered. It lacked a personalized loyalty platform, customer analytics or a CRM strategy important for retaining customers in a competitive environment.
- d) **Changing Customer Expectations:** With changing local population and increased diversity of customers, Exchequer lagged in bringing changes to its menu and services. Also. Post pandemic, there was a need of personalized experiences, seasonal décor and offers and value-driven efforts, which the restaurant lacked.

2. Business and Strategic Goals:

All these factors led us to think of, plan and implement a revamp that would help the owners of Exchequer to reignite the flames of the people's restaurant with vigour and innovation, giving rebirth to 'The Exchequer Revamp'. Our business goals are the following:

- a) **Increase weekday revenue:** With the use of analytics to identify low-traffic points and customer preference, we suggest the use targeted campaigns and offers. For instance, lunch specials, early bird offers, student discounts etc.
- b) **Improve operational efficiency:** Tracking inventory, supplies and turnover, we suggest optimization strategies and reduction in wastage.
- c) **Loyalty program:** To retain customers through repeat business, we suggest implementing loyalty programs or rewards systems
- d) **Incorporating CRM:** Using the easy and effective Salesforce CRM to manage customer relationships, campaign tracking and feedback would be a gamechanger.
- e) **Agile Decision making:** By tracking real-time visibility, historical trends and progress using Tableau dashboards, stakeholders will be able to take effective and in -time decisions and devise profitable strategies.

3. Exploratory Data Analysis

Given the limited digital footprint of The Exchequer and its subsequent closure, we could not get hold of key data of the restaurant itself. However, with the help of related data and the use of Mockaroo to simulate data that represent the current situations we performed EDA to understand the present scenario of the restaurant, to help us in our analysis. By analysing the sales, suppliers, customers and expenditure data we have gathered the following initial insights:

- The sales of the restaurant plummeted in the year of Covid pandemic 2020, and in the subsequent years the revenue generated has been very poor.

- As the news reports [2],[3] state, the data too showed there was lower customer footfall on weekdays.
- Some suppliers like Becker-Smith, Beck Ltd had high defect rates for their food products.
- More of the revenue was being spent on utility bills and marketing so as to keep the business afloat.

4. Fit-Gap Analysis

<i>Business Requirement</i>	<i>Fit/Gap</i>	<i>Current Scenario</i>
Sales and revenue	Gap	Sales fell rapidly after COVID.
Operational costs	Gap	Higher fixed costs, and costs soared for utilities, wages, food prices.
Customer base	Fit	Strong customer presence and loyal customer base.
Food – Services – Ambience	Fit	The services and the food served is excellent and the location and ambience of the business is a major merit.
Marketing and online presence	Gap	Limited digital footprint, lack of proactive marketing campaigns.
Customer feedback and Retention	Patial fit	General positive sentiment, but a workflow to retain customers are absent.
Strategic partnerships	Gap	No digital collaborations or partnerships with other brands.
Digital infrastructure	Gap	It just has on-premises setup, no data backup or remote access.
Data analytics	Gap	Most decisions were based on experience and instinct, data-driven decision - making and forecast is absent.
Handling customer interactions, complaints	Gap	A CRM solution for doing these activities is required.

Table 1: Fit Gap Analysis

5. SWOT Analysis

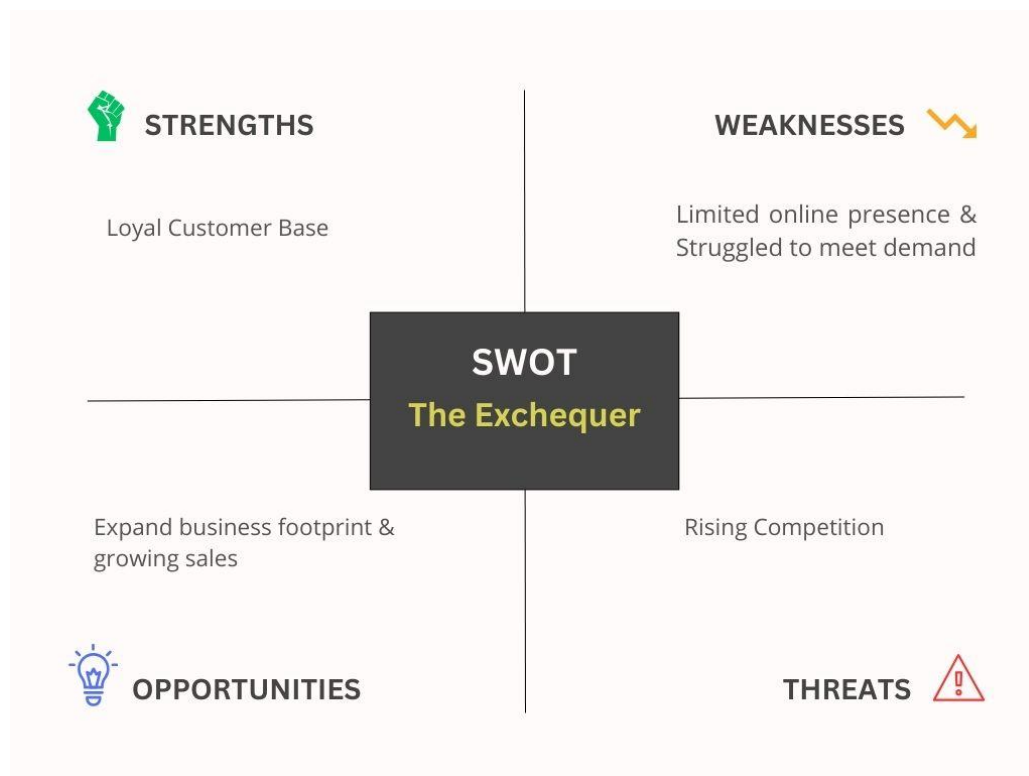


Fig. 2: SWOT Analysis of The Exchequer

Loyal customer base and the established brand name act as great strengths for Exchequer and has been carrying it until recently, despite its financial woes. Weaknesses like poor digital engagement and failure to gauge changing customer preferences were some of the reasons for its downfall. However, these weaknesses give rise to opportunities for revival like a CRM implementation, targeted marketing, expanding business footprint through strategic partnerships with online delivery apps etc. Some threats that cannot be directly handled are VAT regulations and global economic woes. Other threats like rising competition can be tackled by staying ahead in the race utilizing the power of strategic analytics and CRM solutions.

6. System Design

Based on our analysis of the problems The Exchequer faced and our goals for its revival, we have devised a system design using a digital ecosystem with data capture strategies and data analytics to enable data driven decision – making.

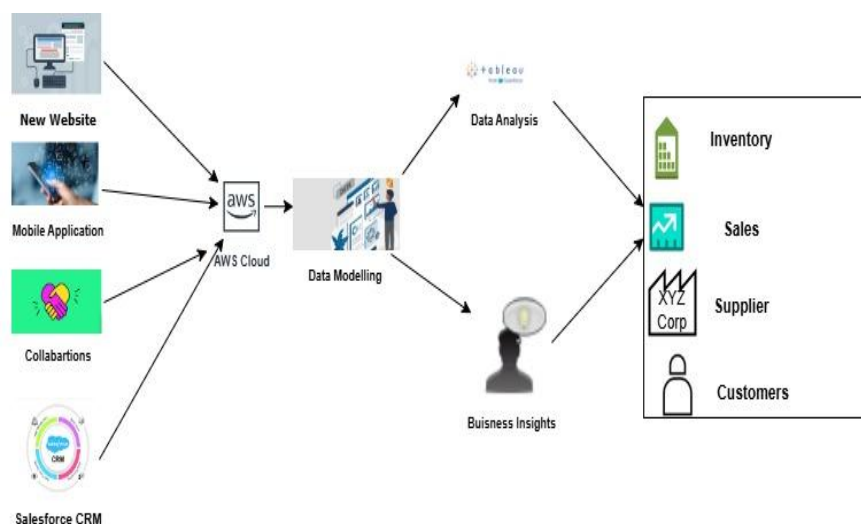


Fig. 3: Business Flow Diagram

A. Data Capture Points

Customer Interaction points – A new revamped website for The Exchequer would serve as a good platform to gather customer analytics through menu browsing, contact forms, bookings, feedback forms etc. We also propose a Mobile App that could be implemented later for implementing more advanced features. Point of Sales (POS) systems give data related to sales and payments.

Strategic Supplier collaborations – Inventory data and data regarding supplies and related expenditure for raw materials serve as data capture points for the back-of-house operations.

Also, collaborations with brands like wine/beer distributors, for instance partnering with Guinness to serve a premium or select/new variety of beer at The Exchequer alone would improve footfall. In this case, data of the deal, negotiated pricing, footfall and sales during the collaboration period etc. serve as data sources.

B. Salesforce CRM

Salesforce will serve as the core for managing loyalty, customer relations and recovery. We propose Salesforce because:

- repetitive tasks could be automated through workflows; thus, Exchequer could spend less efforts and time on tracking customers,
- it offers a centralized customer interaction platform and service cases,
- it gives real-time data at fingertips that helps in making better and faster decisions
- it is very easy to use, even for non-technical users.

Salesforce will be used to implement few services that help the business to track its customers, specific cases and its business in an efficient way.

- a) Marketing campaigns and tracking its effectiveness
- b) Handling negative customer feedback and appropriate compensatory offers
- c) Cost tracking
- d) Inventory waste trigger

C. Central Repository

We propose using a cloud service provider like Amazon Web Services (AWS) as a central repository to store all the data that is generated and collected. This is because AWS offers scalability and robust integrations with Salesforce and other applications we intend to use in the digitization efforts. We propose AWS due to the following reasons:

- a) Excellent scalability: It is suitable when the data load is low at the beginning of the Exchequer revamp and suitable even when the sales pickup and demand is very high, for instance during seasonal peaks (Christmas, Valentine's Day, St. Patrick's Day). It does not need any manual intervention and more importantly no extra infrastructure.
- b) Multiple services: AWS gives numerous options like RDS for database needs, S3 buckets for file storage and even AI tools. So, there would not be a need to juggle between multiple vendors as various requirements arise and evolve in the future.
- c) Pay-as-you-go: Since Exchequer is a moderately small business, AWS is ideal as it only charges for the services used. Thus, a large capital expenditure at the outset can be avoided. The costs scale as the business scales.

d) Integration with Salesforce and Tableau: AWS ensures smooth data flow and connectivity with both Salesforce and Tableau.

D. Data Modelling

Collected data stored in AWS would be converted into a structured format through dimensional modelling and creating fact and dimension tables, which would then be subsequently fed to Tableau to generate visualizations.

E. Tableau

This is an important component of our proposed design as it is here data would be visualized. This would serve as the main Business Intelligence (BI) tool for our system. The idea is providing a tool or platform for the decision makers at Exchequer to:

- Track customer behaviour and preferences
- View real-time business performance
- Monitor effectiveness of corrective actions and campaigns taken
- Reduce waste and optimize inventory

F. Business Decisions

All these components and the insights gathered from the visualization would then aid the stakeholders to take strategic decisions that would accelerate the business, especially in the fields of customer retention, optimizing supplies, managing expenditure and improving the sales.

For implementing this system plan, we plan to use the DMAIC approach along with Kotter's 8 steps for change management.

Define: Revamp the operations, improve the sales and increase the customer footfall at The Exchequer restaurant.

Measure: Collect the datasets and identify the use cases.

Analyze: Gather insights from the data, find the pain points and plan the system design

Improve: We have designed the system design that we plan to use, so as part of this step, implement plan and set up processes using Salesforce, Tableau and other tools.

Control: Use the system and solutions and monitor to check if the desired results have been generated. For this we would be using data analytics and graphs.

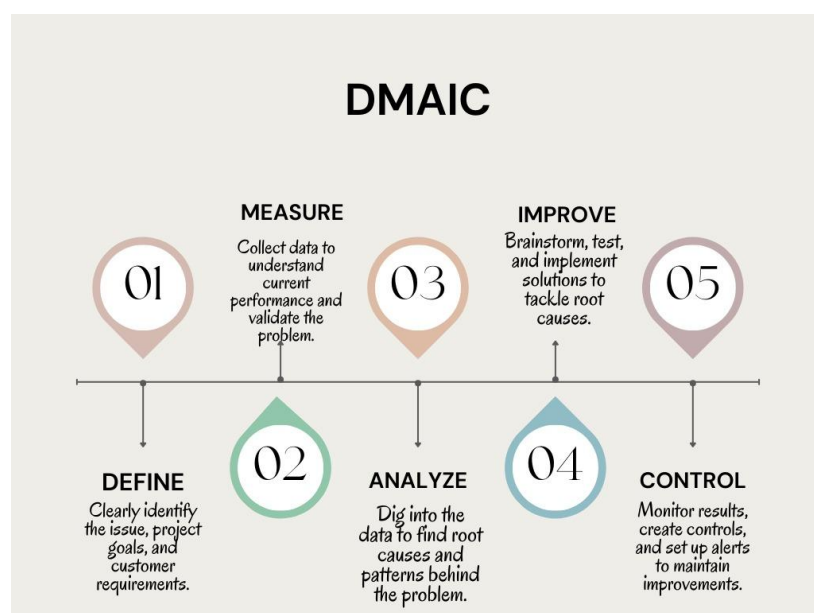


Fig 4: DMAIC Approach for Project Specification Part

7. Database Design

We have four datasets – Sales, Expenditure, Suppliers and Customers, which will be used to devise our solutions and visualizations for the revamp.

A. Sales

This dataset tracks the transaction data of each product sold.

Data dictionary:

<i>Feature</i>	<i>Description</i>	<i>Data type</i>
Date	Date of sale	Date
Time	Time of sale	Time
Period	Pre-covid, lockdown or post-covid	String
Product ID	Unique product ID	Integer
Quantity Sold	Units sold	Integer
Price	Rate of the product	Float
COGS	Cost of goods sold	Float
Profit Margin	Profit for the product	Float
Competitor Price	Competitor price of the product	Float
Promotion	Name of promotion under which the product is tagged	String
Promo Boost Factor	Priority of this product in the promotion campaign	String
Forecasted Sales		Integer
Menu Item	Name of the product	String
Category	Food, Beverage or Dessert	String

Table 2: Data Dictionary of Sales Dataset

B. Expenditure

This dataset has the record of all business-related expenses, which include both the operational and marketing expenditure.

<i>Feature</i>	<i>Description</i>	<i>Data type</i>
Record Type	Variable or fixed cost	String
Category	Nature of expenditure	String
Amount	Cost incurred in euros	Float
Employee Role	Job title	String
Shift	Time of day the employee works (Night/Day/Evening)	String
Contract-type	Type of employment (Part time/Full time)	String
Campaign	Business initiative tied to the expense	String
Service	Platform associated with the service (CRM/Website)	String
Projected Expense	Budgeted amount	Float
Actual Expense	Real amount spent	Float

Table 3: Data Dictionary of Expenditure Dataset

C. Suppliers

This dataset contains information on stock levels, supplier data, spoilage rates and delivery time.

<i>Feature</i>	<i>Description</i>	<i>Data type</i>
Inventory Item	Name of the product in stock	String
Category	Food, Beverage or Dessert	String
Stock Level	Current number of units in stock	Integer
Usage Per Day	Number of units consumed per day	Integer
Expiry In Days	Number of days until product expires	Integer
Spoilage Rate	Proportion of stock that gets wasted due to spoilage	Float
Supplier	Name of vendor	String
Supplier Location	Location of supplier	String
Organic Or Local	Locally sourced or organic	String
Cost Per Unit	Price per unit of the product	Float
Delivery Time Days	Number of days for the stock to be delivered	Integer
Order Frequency Days	Frequency of reordering	Integer
Lead Time Days	Time from placing order to receiving the item (including delays)	Integer
Customer Order Trend	Customer purchase count	Integer
Waste Units	Number of units wasted	Integer

Table 4: Data Dictionary of Supplier Dataset

D. Customer

This dataset includes visit patterns, service ratings and demographics of the customer.

<i>Feature</i>	<i>Description</i>	<i>Data type</i>
Customer ID	Unique customer ID	String
Visit Date Time	Date of visit and purchase	Date
Rating	Rating provided by customer for the service	Float
Footfall category	Time of day of the purchase (Evening/Morning/Night)	String
Preferred Food Segment	Food preference (Spanish/Irish etc)	String
Residential Area	Residence of the customer (Local, far, or near the restaurant)	String
Customer Type	Relationship with business (Regular, First-timer, Seldom, Tourist)	String
Gender	Customer's gender	String
Nationality	Ethnicity of the customer	String
Age	Customer's age in years	Integer

Table 4: Data Dictionary of Customer Dataset

8. Entity Relationship Diagram

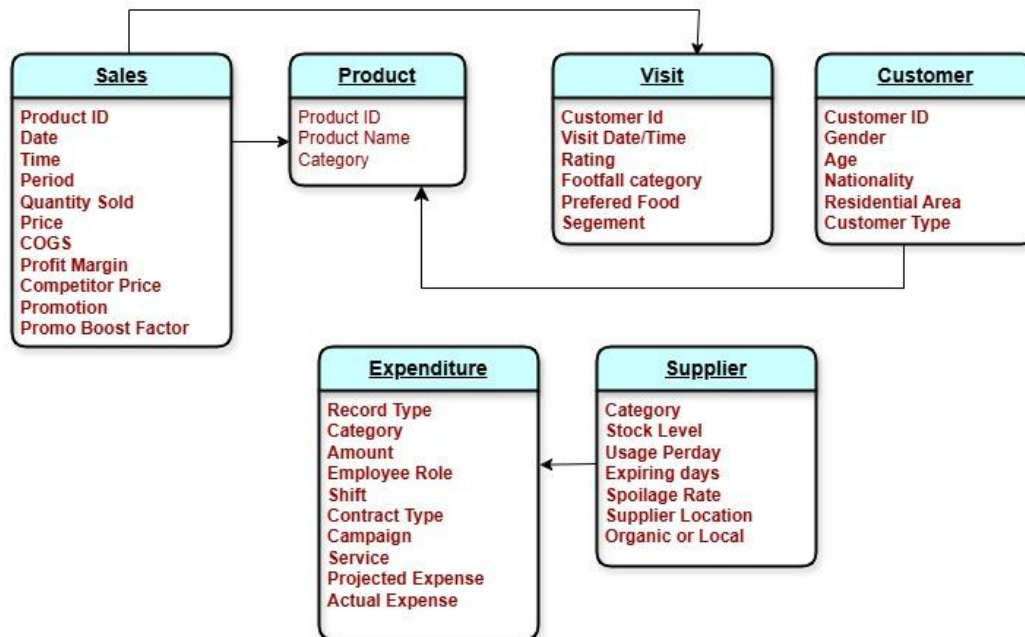


Fig. 5: Entity Relationship Diagram Among Different Units

The Customer table stores all the demographic details about each customer. We have further divided the main Customer table into a Visit table to understand the relationship between each of the tables in The ER diagram. It contains the time of day the customer arrived and the ratings they provided for the service. The Sales table tracks all the products sold along with their profit, price and forecasting. The details of the products are held in the Product sub-table, shown in the ER diagram for better understanding. The Expenditure table has entries of various costs the business incurs. Supplier table has information on the ingredients and their sourcing. The Customer table is linked indirectly to the Sales table via the trends based on customer type, age or nationality.

Part 2: Project Implementation Report

We aim to provide a comprehensive digital transformation solution for The Exchequer. From the fit-gap analysis, it is evident that the business lacks digital footprint, does not avail the benefits of digital transformation among many other issues like increasing operational costs and failure to adapt to changing customer expectations.

Our solution consists of Salesforce CRM functionalities coupled with Tableau dashboards of major KPIs and data visualizations that would help the business owners to manage and expand the business with the help of data-driven decision making. We have structured our development process and its implementation using Kotter's 8-step change management model. We seek to design a scalable and cost-effective pathway for the successful revamp of The Exchequer.

1. Development Process

A. Creating sense of urgency

Our analysis has already revealed the various factors that lead to the closure of The Exchequer. Along with market research and rapid digitalization of every aspect of human life, we strongly advocate and feel it completely necessary for the digitalization of various services of the business, like marketing, sales, inventory management, customer retention programs, data management. The owners and stakeholders need to understand and would be convinced that in order to stay ahead, digitalization is absolutely essential. This would be done by explaining to them the advantages, productivity and speed that it guarantees.

B. Building a guiding coalition

We identified the initial group of people that need to be involved in this change management process. They are- the restaurant owners, staff managers, head chef, 2-3 key suppliers and our team (to provide Salesforce and Tableau technical knowledge and our solutions). This would ensure that all major domains and perspectives are covered.

C. Creating a strategic vision

Our vision is to preserve the authentic Spanish culinary experience and integrate other cuisines too, to attract new customers and retain the existing base. Also, we aim to enhance customer loyalty through personalized experiences, optimize weekday operations and manage spoilage in the inventory.

For this we have implemented Tableau dashboards for different business components – Sales, Expenditure, Supplies and Customer. These help the stakeholders to analyze trends, forecast supply shortages or excesses and make strategic and data-driven decisions.

Additionally, we have implemented few workflows in Salesforce CRM targeting customer retention, marketing campaigns and inventory management, concentrated on both the admin user (Exchequer employee/digital manager) and the customers.

The Salesforce workflows are the following:

a) Admin user

- Feedback – Low and positive rating workflow
- Consumer registration
- Consumer response to offers
- Campaign member automated addition
- Inventory management

b) User / Customer

- Personalized menu
- Loyalty program
- Feedback submission
- Online ordering
- Marking calendar events and related offers

D. Communicating the vision

Continuous progress and updates regarding the improvement programs will be provided to the core team through:

- Weekly meetings with the stakeholders
- Training sessions for staff for the new systems and digital infrastructure
- Visual roadmaps, mind maps and plan placed in staff common areas

E. Removing barriers

The potential barriers to our suggestions that we identified are:

- Technology hesitation: There might be an initial reluctance by the employees to make use of a CRM system. However, we have chose Salesforce as our CRM platform which is very easy for a non-technical person also to use and manage and given its numerous advantages, we believe this learning gap could be quickly overcome.
- Data migration challenges: Since a lot of data needs to be digitalized from its physical form, there could be data loss or mismatch while migrating. This could be handled by using structured templates for data entry.
- Cost constraints: Even though considerable amount needs to be invested initially for the digitalization phase, it would change in the future only according to our use of the service. Services like AWS which is a pay-as-you-go model, charges only for the resources that we use, providing secure and excellent productivity and data redundancy simultaneously. In the long run, this would be much better than investing continuously on redundant IT infrastructure.

F. Generating short-term wins

We aim to implement the following programs in the initial phase of transformation:

- Launch of loyalty program in the first month
- Feedback/rating system implementation
- Inventory management system to track and reduce spoilage
- Tableau dashboards for understanding customer preferences and demographics

G. Consolidating the gains

After assessing the impacts and success of these programs, based on customer response and improvement in sales, we would scale them up and expand

- by diversifying the loyalty programs,

- implementing two different workflows to handle low ratings (< 2) with compensatory discounts and high ratings (> 2) with personalized offers and campaigns
- and advanced inventory analytics

H. Instituting the changes

To guarantee continued success and business continuity, we suggest constant support is given to the staff through training materials, maintaining documentation of all processes and conducting regular reviews. Once the process has been set up, the business owner could themselves use the insights from the dashboards and Salesforce workflows to drive the business on a strategic and successful path. This is because, their strategies would now be based on historical data, trending customer preferences and statistical forecasts.

2. System Implementation (Salesforce)

The implementation details of our solutions are detailed here.

We have two main pathways in our Salesforce solution, one for the admin and the other for Customers.

A. Admin path

a. Customer registration

Trigger: A customer registers through website or POS

Process:

- Contact record is created in Salesforce for that customer automatically
- Simultaneously, an opportunity record is also created, associated with this contact. This is used to track the customer feedback lifecycle, manage loyalty, and offers for that customer.

This creates a structured relationship between services provided and the customer identity. Also, it enables detailed tracking of customer service performance.

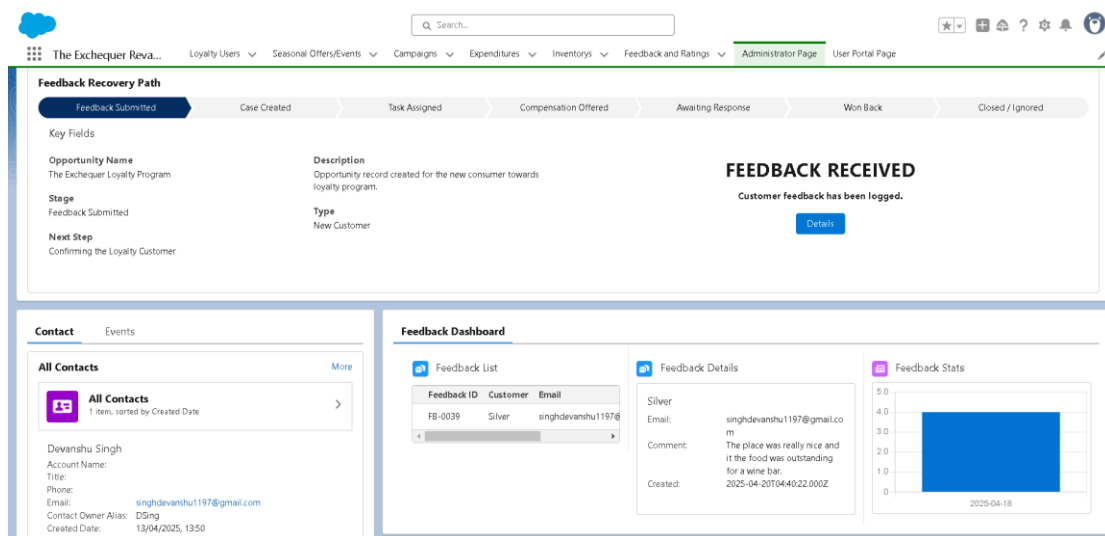


Fig. 6: Customer Registration visible on Admin

b) Negative Feedback workflow

Trigger: Customer submits a rating below 2 (out of a scale of 5) as feedback.

Process:

- For this trigger, a case record is automatically created with the help of the flow pipeline.
- A Task is also created under the case and assigned to the respective internal staff like a service manager etc.
- The assigned person gets an automated email with a link to the case and a summary of the feedback from the customer
- Simultaneously, the Opportunity Stage for the customer is updated to 'Compensation Offered' awaiting response from the customer.
- An apology email is sent to the customer automatically that acknowledges the issue and offers a promotional discount or a free item as compensation for the unsatisfactory service.

This quick response helps to avoid customer churn from a loyal customer base, personalized re-engagement to win back trust and indirectly increase footfall on weekdays.

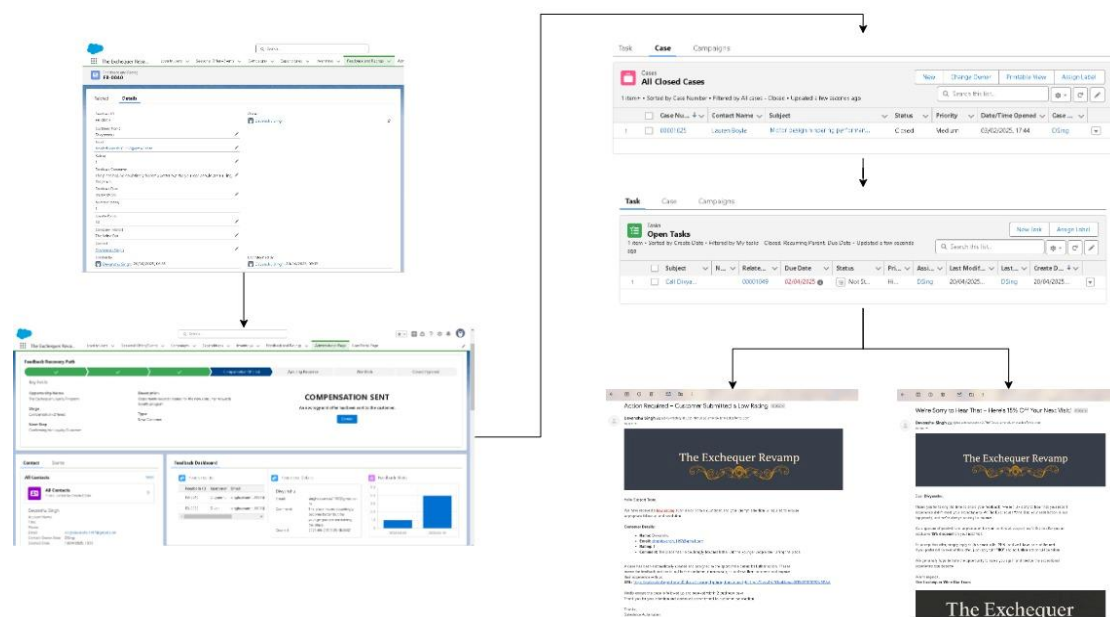


Fig.7: Flow for Negative customer Feedback (Admin side)

c) Consumer response (Yes/No to offer)

Trigger: Consumer replies to the apology/offer email with 'YES' or 'NO'

Process:

- If customer answers 'Yes', the Opportunity Stage is changed to 'Won Back', indicating that the customer is retained and not lost to the business. Also, the campaign cost is updated of which the customer is a member of.
- If the answer is 'No', the opportunity becomes 'Closed/Ignored'.

This workflow helps in feedback resolution and closes it with a clean outcome tracking.

Process:

- Eligible customers are added as Campaign members automatically
- And they receive personalized email invitations to be part of the campaign

This maximises the participation and promotes increase in weekday footfall by offering specific weekday discounts to these members, student discounts etc.

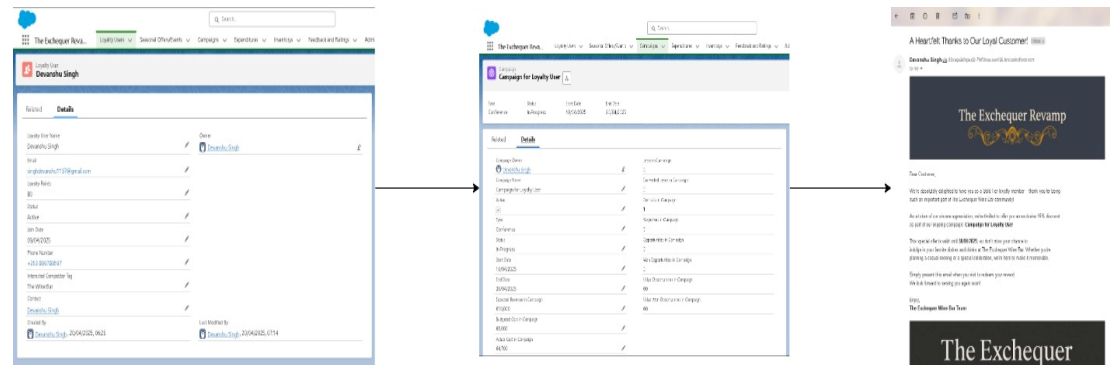


Fig. 10: Campaign flow for Loyalty Customers

f) Inventory management & Dashboard

Trigger: Inventory item has less than 2 days to expire and the number of waste unit more than 10

Process:

- The dataset is analysed, and a Task is created on the specific inventory record
- The Task is assigned to the inventory manager

This handles prevention of unnecessary food wastage as the manager can take an appropriate decision, slightly modify the menu to use those ingredients before they get spoilt and above all keep the stock profitable and healthy.

In addition to that the Admin can keep track of the functionality through the dashboard which helps in understanding the dynamic with the customer.

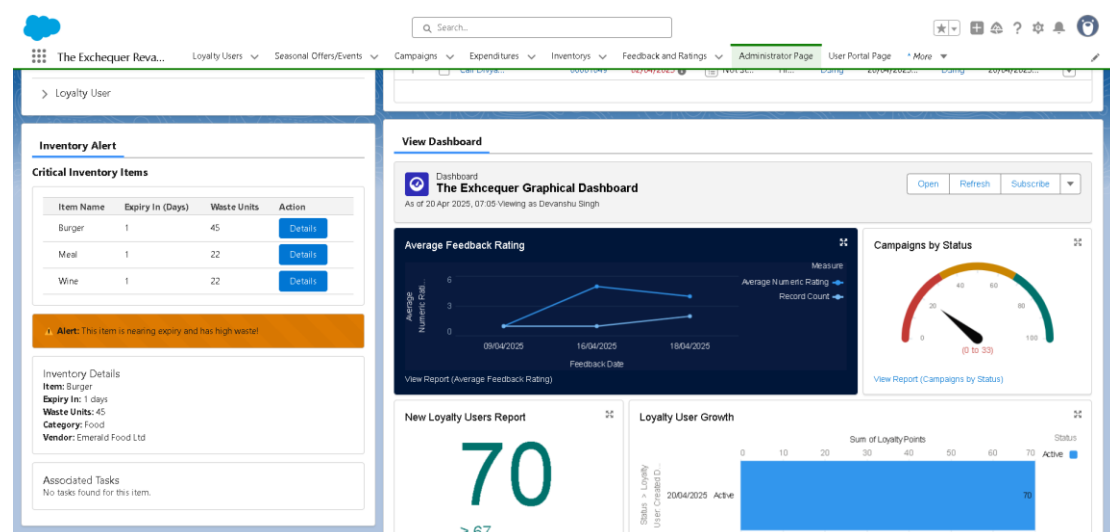


Fig 11. Inventory Management & Dashboard (Admin)

B. User path

a) Seasonal menu display

Trigger: Menu section is accessed by the customer

Process:

- A dynamic menu is displayed based on the current festival or season
- The details like description, price etc of the menu is shown

This would encourage seasonal sales and limited time purchases. It would also enhance customer delight and relevance.

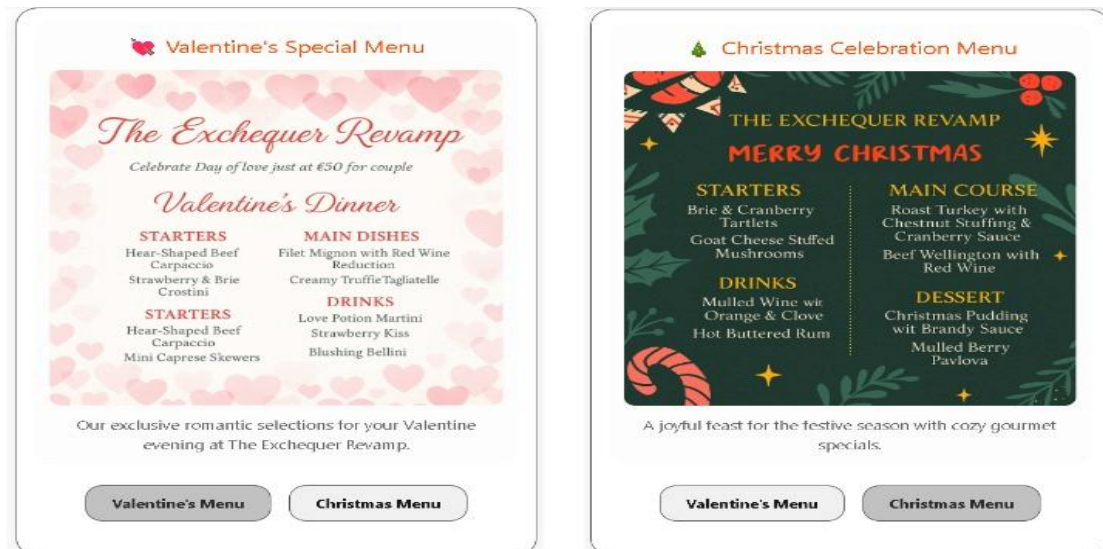


Fig. 12: Specially Curated Menu (For User view)

b) Enrolment to loyalty program

Trigger: Customer Day applies to the loyalty program

Process:

- There are 3 available groups/ types of loyalty program – Silver, Gold, Platinum, that the customer can choose from
- The application is processed and then linked to the customer's Contact record

This enables targeted marketing based on the loyalty level of each customer. Additionally, it would enhance customer segmentation and retention.

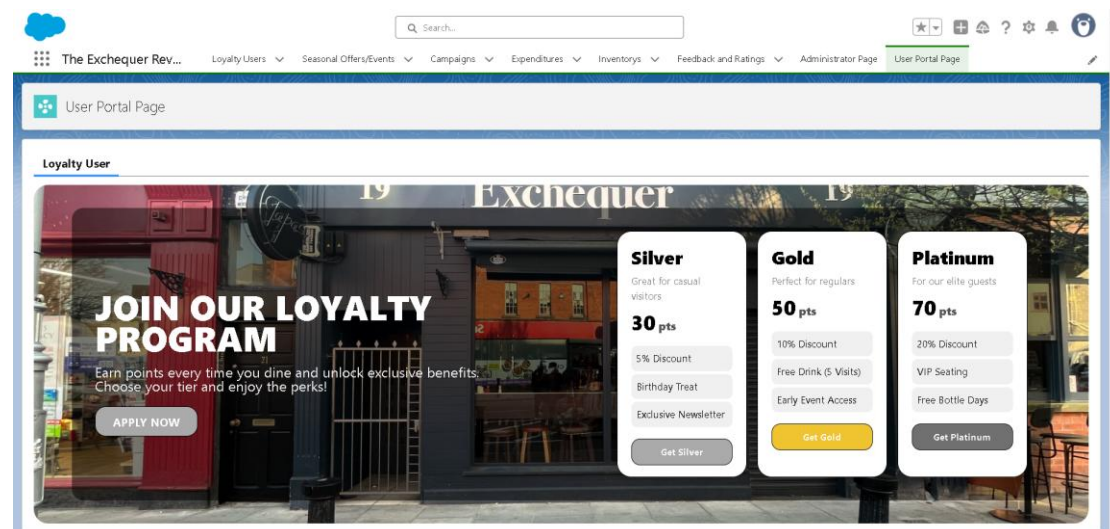


Fig. 13: Loyalty Programs for User

c) Feedback submission

Trigger: Customer submits the rating

Process:

- The rating score is stored in the backend and linked to both the Contact and Opportunity after the user submits the rating.
- This automatically triggers the admin-side workflows to handle negative and positive ratings accordingly.

This workflow has a great potential in handling and maintaining customer satisfaction.

Fig.14: Rating & Feedback submit Form (User)

d) Delivery order

Trigger: Customer requests for home delivery

Process: Order details are saved, sent to the kitchen and delivery is scheduled and tracked internally.

This workflow has the potential to expand the restaurant's services, increase convenience for customers. Another idea here is to partner with online delivery apps to schedule, track and manage home deliveries. This would take off a huge burden from the internal system of managing home delivery and the costs associated with it. Also, it would increase the reach of the restaurant.

Fig. 15: Delivery Option for Customer

e) Offers and events discovery

Trigger: Customer accesses the calendar or offer section

Process: Upcoming festivals or events are shown with the description and dates.

This feature could increase footfall and engagement through visual features.

Upcoming Events

Browse through all the upcoming events that will be a part of Exchequer.



Fig.16: Upcoming Campaign & Events for Customers (User side)

3. Visualization (Dashboards)

The Tableau dashboards have provided a comprehensive analysis of the data thus, helping in shaping strategies and path to implement other features.

A. Customers Dashboard (Tactical type)

The KPIs indicate that the average rating provided over a period of 6 years by almost 5000 customers is 3. This suggests that there is room for improvement. However, the returning customers make up almost 75%, that shows a strong customer retention and loyal customer base, results similar to our initial analysis. The different footfall times – Morning, Afternoon, Evening, Night show interesting distributions. Afternoon and morning seem to have the most evenly distributed mix of customer types. Night-time customers include more tourists and seldom visitors, which seems to be a good potential for targeted promotions. The Exchequer could now focus on creating more amenities and an ambience to attract customers. Also, they could include dishes from other cuisines to target and attract tourists. The seldom visitors could be added to the Salesforce marketing campaigns to make them aware of the various offers and services provide by Exchequer, at their convenience, through online modes, even if they do not visit the restaurant very often. The age-related analysis reveals useful insights. The 25-34 age group prefers Irish food and beverages, indicating that a constant supply and service for Irish dishes should be maintained for ensure steady footfall, even during the weekdays. Thus, it is revealed that Exchequer customers not only love the authentic Spanish tapas but also enjoy the Irish cuisine here. Thus, the business owners can now stock their inventory accordingly for the dishes that should never go out of stock, so that continued footfall is maintained.

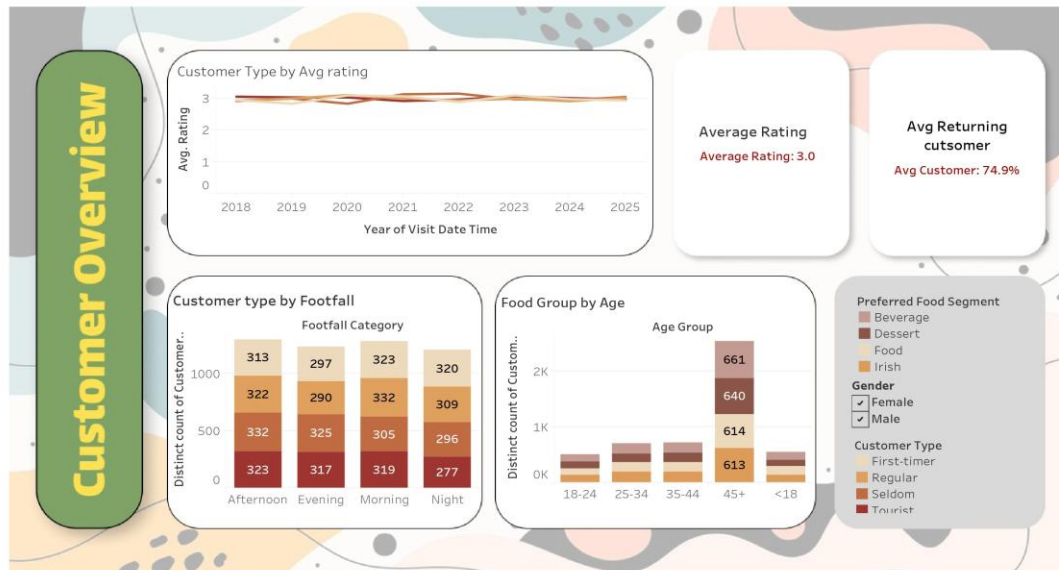


Fig. 17: Customer Dashboard

B. Expenditure dashboard (Strategic Type)

This dashboard displays vital information about the cost of running the business and helps decide how loss could be prevented.

92.27% budget utilization demonstrates efficient financial planning so far. However, it leaves very less room for unforeseen expenses or shortfalls, just like what happened during the Covid induced lockdown. The variance figure suggests the amount of unspent money that can be re-allocated strategically. So, this amount of 1,249.692 EUR could be very useful in driving the digitalization of The Exchequer. The total expense figure shows that significant investments have been made to keep the business afloat, and majority of that was spent on external contracts. This shows that the owners are ready to partner up with strategic brands and outsourcing certain operations, which is in line with our plans to make Exchequer partner up with well-known beverage brands to sell their special edition products at Exchequer exclusively, increasing footfall and services at the restaurant. The top expenditure was for advertising followed by inventory purchases. This suggests that there is strong focus on marketing already. The lowest expense was for payroll, indicating a lean workforce and the heavy reliance on external contracts. This might also be a strategy to control the expenditure. There should be renegotiations of external contract agreements to optimize the money spent here. We did a bit of projected expenditure on our initial campaigns. So the amount for General awareness i.e. marketing of the business stands ahead, which is the need of the hour, Also the projected expenditure for Christmas and Spring Promotions are well within the budget surplus.

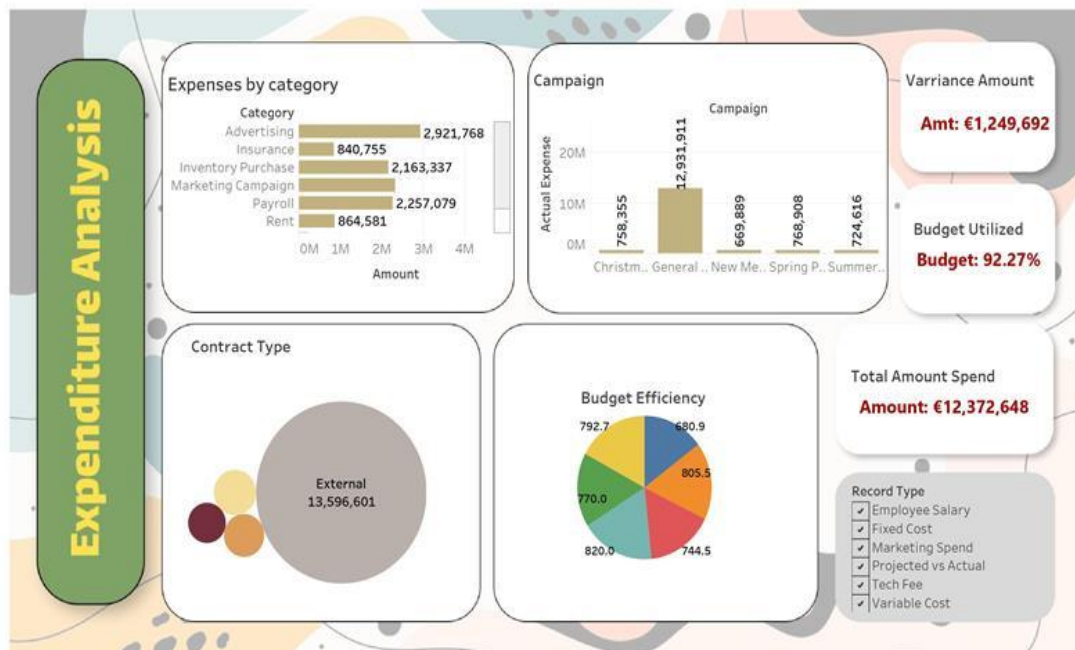


Fig. 18: Expenditure

C. Sales dashboard (Operational Type)

Sales peaked around 2012 with steady performance in the following years. However, there was a big fall in the sales in 2020, the year of Covid lockdowns, post which the business has not performed well at all, leading to its closure. The Beverage and Desserts categories show consistent strong performance indicating that there should be continuous investments in the beverages and its supplies should be maintained steadily. The key promotions that performed well are Happy Hour, Holiday Offers Weekend Specials and Late-Night Deals. The promotional campaigns that we have suggested show balanced effectiveness. The Late-Night Deals have attracted stable engagement even in weekdays and shows that time-based offers work well. The best-selling items like Whiskey, Guinness and Truffle Fries remain stable across promotions.



Fig.19: Sales Dashboard

D. Supplier Dashboard (Operational Type)

The audit score of 79.41 shows a moderate supplier compliance meaning that some suppliers may not meet quality standards always. The inventory manager must ensure that fluctuations in supplies of fresh produce, meat and dairy should not happen as it may influence customer satisfaction. He/she should also negotiate stricter quality terms with the concerned suppliers. Higher spend in Dublin suggests reliance on local

suppliers, showing that Exchequer prioritises local dealers and support local businesses. However, the restaurant should consider alternative sourcing from other counties given the higher prices in Co. Dublin. Lower-cost regions like Galway could present opportunities for alternative sourcing at reduced rates. The high supplier defect rates for Becker-Smith, Beck Ltd and others demonstrate the Exchequer should consider rethinking their business with these suppliers. Poor quality suppliers may impact daily operations like delays and spoilage of stock.

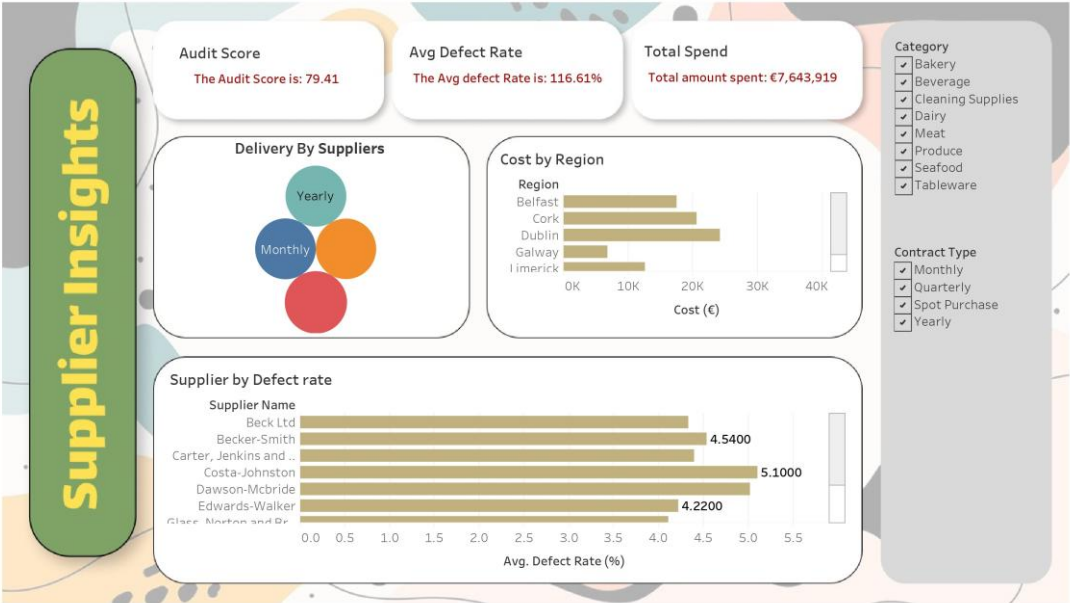


Fig. 19: Supplier Dashboard

4. Some Promotional Campaigns



Fig. 20: Curated Menu for Christmas and Valentine (Promotional)

5. Initial Response

The use of the Salesforce CRM system in combination with the data driven marketing campaigns has helped the Exchequer Wine Bar increase business performance.

The first graph shows that the steady increase of weekday customer numbers between March and May has been most significant. The automated discount emails sent on the basis of positive or negative customer feedback can be tied to this rise. It integrated and filled that gap of customer engagement that facilitated repeat visits and gave room for a more dynamic and interactive customer experience.

The second graph depicts how sales increased due to different promotion deals like Happy Hour, Holiday Promos, and Weekend Specials. Among these, Happy Hour turned out to be the most beneficial for the predicted sales up to Week 22 to go above 4,000 units. Through the numerous promotion programs, resources were utilized in the lean hours and days over the period which proved very beneficial, generating increased revenue. The numbers in aggregate indicate that the solution implemented not only solved the initial business openings but also reached the expected outcomes in performance, building a healthy foundation for development that is both scalable and enduring.

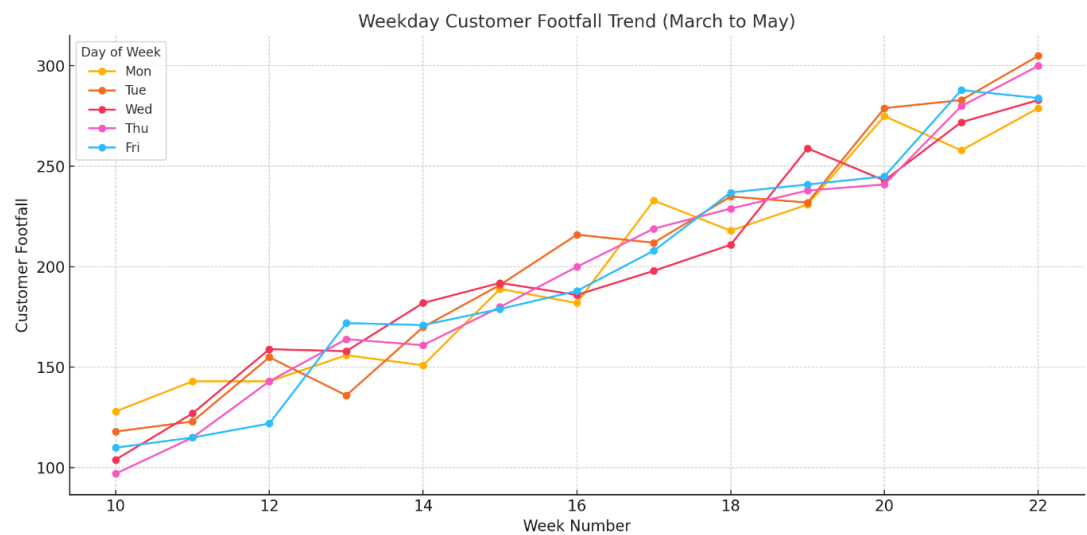


Fig 21. Mock Up Response(Customer Footfall)

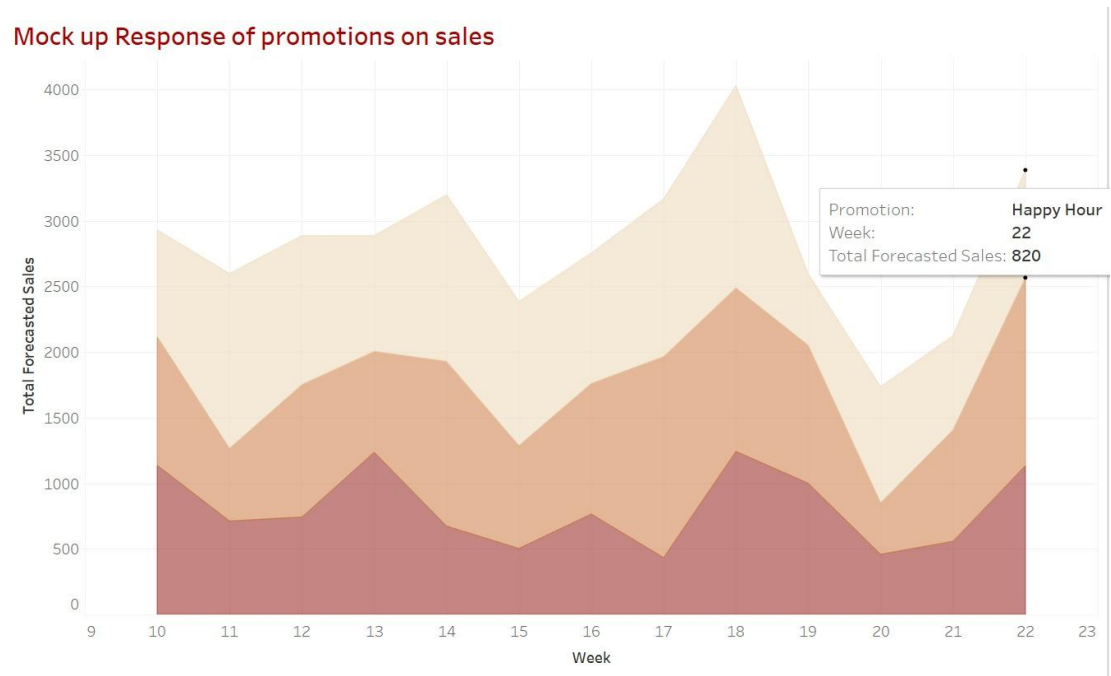


Fig 22. Mock Up Response(Forecasted Sales By week Due to campaigns)

6. Conclusion

The Salesforce CRM, visualization dashboards and the other solutions that we proposed support the successful transformation and digitalization of the business at The Exchequer. The solutions address the core business challenges while preserving the authentic character of the restaurant, that makes it beloved by the customers. The fit-gap analysis helped us to understand and get a clear idea of what we are as a team of analysts were trying to resolve. We applied our learnings and solutions by implementing them using the Kotter's change management methodology. The process also enhanced our understanding of the place of customer engagement strategies and the importance of feedback loops in shaping business decisions. There were some challenges that we faced like:

- The absence of structured historical data for the restaurant was a challenge to a certain extent for us. However, we overcame this by using related and similar datasets along with simulated datasets that helped us to design the solutions and the Salesforce functionalities.
- Another challenge in this project was merging and simulating customer feedback flows across multiple channels like the website, promotional campaigns and partnership with suppliers. Bringing the channels into alignment and implementing those functionalities in Salesforce required coordination, as each data source had different formats and varying customer experiences.
- To handle this, we could have spent more time during planning, in the design state, specifically normalizing the schema in data across the datasets. If we had more feedback from simulated or real stakeholders earlier, we could also have fine-tuned our customer engagement programs before implementing the Salesforce campaigns.

Final Consultation and Marketing Strategy Takeaway for Business

This project has established the basis for a data-driven reorientation of the Exchequer Wine Bar's customer interaction and business strategy. Some additional and invaluable steps that the business could implement for continued success are:

- **Social Media Marketing and Influencer Collaboration:** The restaurant must actively use social media sites such as Instagram, X (Twitter), and on Facebook through hashtags, promotional posts and visually engaging media.
- This would help the restaurant to capture customers to post their experiences on Google, Tripadvisor and Instagram, all in return for high reach.
- With zero or minimal marketing budget local food bloggers and influencers could be engaged to market the restaurant to the young demographic audience increasing visibility.
- **Using NLP:** Reading and analysing real time customer reviews gathered from diverse channels with Natural Language Processing can check for patterns in the moods for food quality, service, ambience, or some particular menu item. These analytics can then be used to adjust the ambience based on mood trends, change the menu to suit customer preferences, or fix most frequently mentioned pain points.
- **Real-Time Customer Feedback Gathering:** QR codes on each table can have a form for customer to fill out about their dining experience. The responses provide the right platform to gather

data systematically at source and it will speed up issue resolution and satisfaction of customers.

- **Organizing Live Performances:** The restaurant could organize live music performances featuring well-known local artists Irish folk songs and other performances to attract customers and thereby increase footfall.
- **Partnerships with Online Delivery Apps:** The restaurant has to partner with food delivery software such as Deliveroo, Just Eat or Uber Eats so that it may go beyond where it is placed. This will not only give publicity to the brand, but also increase sales by serving customers out of Dublin 06, to the suburbs and diverse communities.

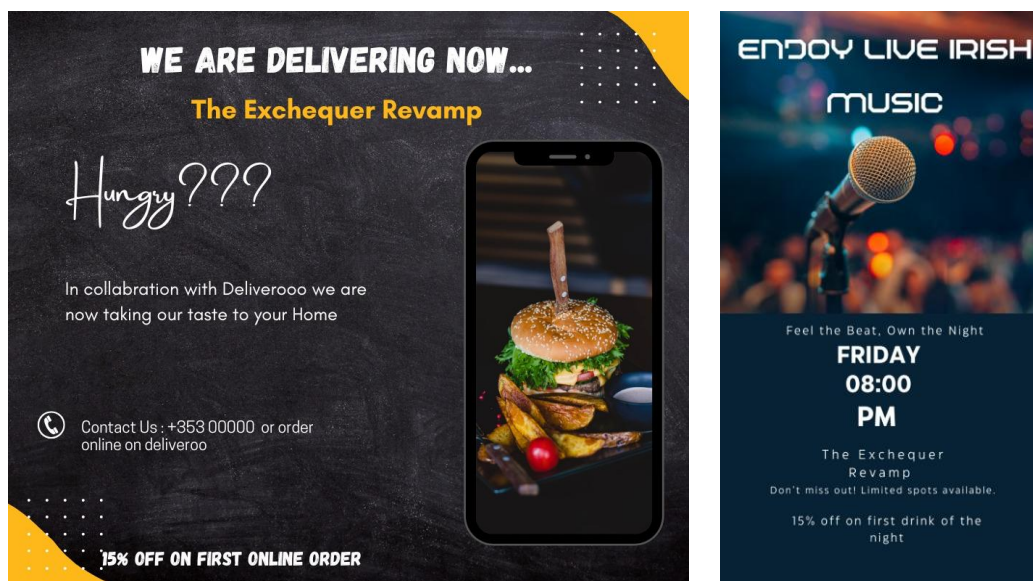


Fig 23: Introduction of Delivery platform and attracting customer by special Entertainment Nights

Team Management

The Team “The Revenue Recipe” working on the business Intelligence Plan for The Exchequer which is closed recently due to financial constraints after Pandemic consists of 3 members Devanshu Singh, Priya Sethi Khurana, Alex Sunny. The Team has used the MIRO Board Whitespace for generating and finalizing ideas & tracking team activities

1. Miro Board Link

https://miro.com/app/board/uXjVIS1UGA8=/?share_link_id=429353636456

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