

# Churn Retention & Prediction CRM

**Industry:** Customer Relationship Management / Sales

**Project Type:** B2B/B2C Salesforce CRM Implementation

**Target Users:** Sales Managers, Customer Support Agents, Marketing Team, Executives

## Problem Statement:

Many businesses struggle to identify and retain customers who are at risk of leaving. Current processes rely on manual tracking or basic spreadsheets, resulting in:

- Difficulty identifying high-risk customers in time
- Inefficient communication and follow-up strategies
- Missed opportunities to offer personalized retention actions
- Limited insights for management decision-making

## Churn Retention & Prediction Solution:

A Salesforce solution with a Flow-type chatbot to predict at-risk customers and automate retention actions, improving engagement and reducing churn. It provides personalized follow-ups, automated notifications, and dashboards for efficient customer management and decision-making

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## Phase 1: Problem Understanding & Industry Analysis

### 1. Requirement Gathering:

- Customer management (Name, Email, Phone, Account details, Subscription dates)
- Churn risk tracking (High, Medium, Low risk customers)
- Retention action management (Follow-ups, Offers, Notifications)
- Dashboard and reporting (At-risk customers, Retention success, Team performance)
- Automated notifications for follow-ups or subscription renewal reminders

## 2. Stakeholder Analysis:

- Sales/Support Manager: Full control over customer data, retention actions, and dashboards
- Support Agent/Marketer: Track at-risk customers, execute follow-ups, and update retention actions
- Executive: View analytics and overall churn trends for strategic decisions

## 3. Business Process Mapping:

1. Customer signs up → added to CRM
2. Assign subscription start/end dates → track active/expired status
3. Identify churn risk → categorize as high, medium, low
4. Assign retention action → send notifications or follow-ups
5. Generate reports → dashboards for churn trends and retention success

## 4. Use Case Analysis:

- Manual tracking of customer churn causes missed retention opportunities and delayed follow-ups
- Management cannot monitor real-time churn risk or retention efficiency

## 5. AppExchange Exploration:

- Explored apps like Salesforce Health Cloud (for customer tracking) and Retention Management tools for reference features

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## Phase 2: Org Setup & Configuration

**Purpose:** Configure Salesforce org for Churn to ensure users, profiles, roles, and security settings are correct.

### Steps:

1. **Salesforce Edition:** Developer Edition

## 2. Company Profile Setup: Name, Address, Timezone, Locale, Currency

**Company Information**

MVGR

The organization's profile is below.

[User Licenses \(10\)](#) | [Permission Set Licenses \(10\)](#) | [Feature Licenses \(10\)](#) | [License-based Entitlements \(10\)](#)

**Organization Detail**

[Edit](#) [Deactivate Org](#)

Organization Name	MVGR	Phone	
Primary Contact	Sowmya Bonthu	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	624 KB (12%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	215 KB (1%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Format	ICU	Salesforce.com Organization ID	00DdM00000e18UL
		Organization Edition	Developer Edition
		Instance	IND136

Created By: Sowmya.Bonthu, 27/09/2025, 7:19 am

Modified By: Sowmya.Bonthu, 27/09/2025, 1:37 pm

[Edit](#) [Deactivate Org](#)

## 3. Business Hours & Holidays: Mon–Sun, 9 AM – 8 PM; include public holidays for support follow-ups

## 4. Fiscal Year: Standard

## 5. User Setup & Licenses: Create sample users:

- Admin: Full access to all customer data, retention actions, and dashboards
- Support Agent/Marketer: Manage at-risk customers, execute follow-ups, and update retention actions
- Receptionist/Assistant (optional): Create new customer records only

**Users**

[Verify](#)

**User Information**

[Edit](#) [Deactivate User](#)

Email	sneha.j@exampl.com	Profile	Standard Platform User
Username	sneha.j@example.com	Active	<input checked="" type="checkbox"/>
Nickname	Sneha	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">Edit</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<a href="#">Edit</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<a href="#">Edit</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<a href="#">Edit</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	<a href="#">Edit</a>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	<a href="#">Generate</a>	Make Setup My Default Landing Page	<input type="checkbox"/>

**User Settings**

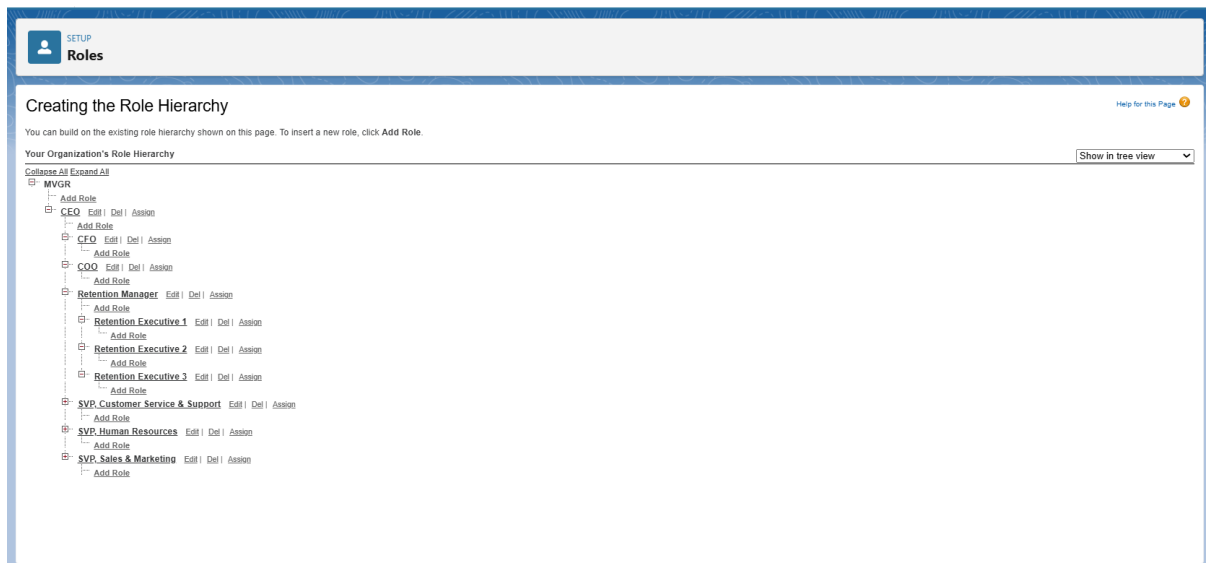
[Edit](#) [Deactivate User](#)

Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Salesforce CRM Content User	<input checked="" type="checkbox"/>
Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Make Setup My Default Landing Page	<input type="checkbox"/>
Allow Forecasting	<input type="checkbox"/>
No MRU Updates	<input type="checkbox"/>
Call Center	<input type="checkbox"/>
Phone	
Extension	
Fax	
Mobile	
Email Encoding	Unicode (UTF-8)
Employee Number	
Used Data Space	0 B <a href="#">View</a>

## 6. Profiles:

- **Admin:** Full access to all customer data, retention actions, and dashboards
- **Support Agent/Marketer:** Edit/View at-risk customers and retention actions
- **Receptionist/Assistant (optional):** Create/View customer records only

## 7. Roles: Admin > Support Agent/Marketer > Receptionist



## 8. Permission Sets: Assign dashboard and report access for Support Agents

## 9. OWD & Sharing Rules:

- **Customers:** Private
- **Retention Actions:** Private
- **Sharing Rules:** Share customers with their assigned Support Agents for follow-ups

## 10. Login Access Policies: Admin can login as any user

## 11. Sandbox Usage & Deployment Basics: Optional for testing retention workflows and deployments in larger org setup

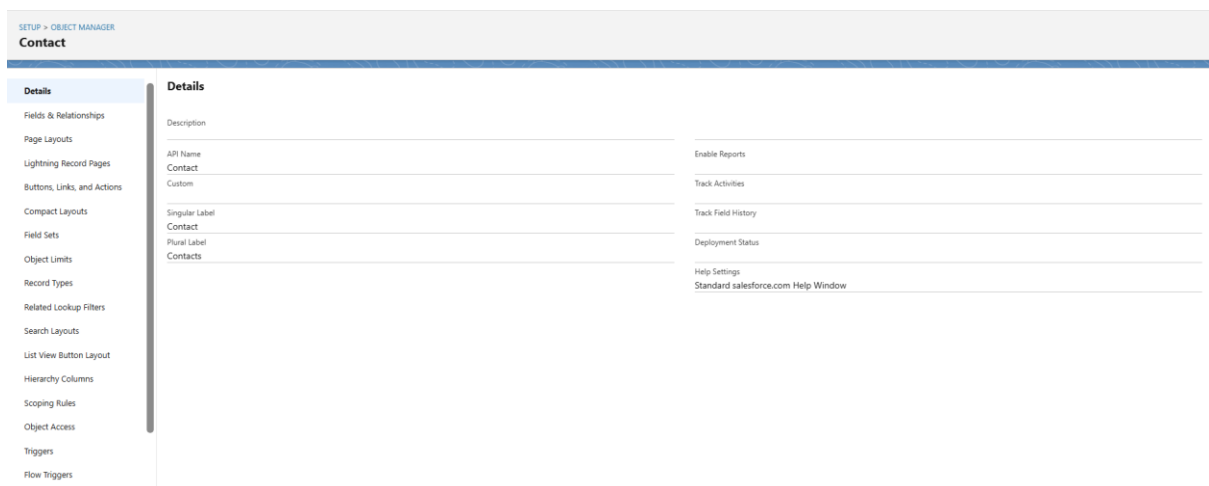
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## Phase 3: Data Modeling & Relationships

**Purpose:** Design objects and relationships for customer, churn risk, and retention action data.

## Custom Objects:

- **Churn Risk:** Risk Level (High, Medium, Low), Reason, Last Interaction Date
- **Retention Action:** Action Name, Type (Email, Call, Offer), Assigned Customer
- **Follow-up Log:** Date, Notes, Status, Linked Customer



## Relationships:

- **Contact** ↔ Churn Risk → Lookup relationship (each customer has a churn risk record)
- **Contact** ↔ Retention Action → Master-Detail (one customer can have multiple retention actions)
- **Contact** ↔ Follow-up Log → Master-Detail (track multiple follow-ups per customer)

SETUP > OBJECT MANAGER

**Contact**

Details

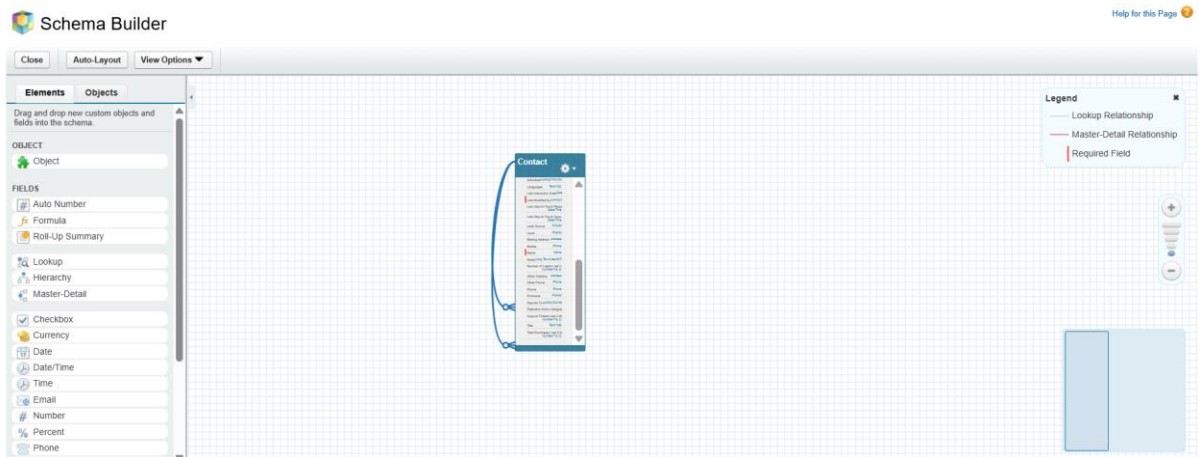
**Fields & Relationships** 39+ Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Buyer Attributes	BuyerAttributes	Picklist (Multi-Select)		
Churn Retention	Churn_Retention__c	Text(18)		
Churn Risk Level	Churn_Risk_Level__c	Picklist		
Clean Status	CleanStatus	Picklist		✓
Contact	Contact__c	Lookup(Contact)		✓
Contact Owner	OwnerId	Lookup(User)		✓
Contact Record Type	RecordTypeId	Record Type		✓
Created By	CreatedById	Lookup(User)		
Creation Source	ContactSource	Picklist		
Data.com Key	Jigsaw	Text(20)		

## Additional Configuration:

- **Page Layouts:** Display key fields on Contact, Churn Risk, Retention Action, and Follow-up Log
- **Compact Layouts:** Show Name, Churn Risk Level, Last Follow-up Date
- **Schema Builder:** Visual diagram of objects and relationships to easily understand CRM structure



## Phase 4: Process Automation (Admin)

**Purpose:** Automate repetitive tasks, notifications, and retention follow-ups.

## Automation Examples:

# 1. Validation Rules: Ensure Churn Risk Level >Email

The screenshot shows the 'Contact Validation Rule' configuration page in Salesforce. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Contact Validation Rule' and includes a 'Back to Contact Validation Rules' link. Below this is the 'Validation Rule Detail' section with the following information:

Field	Value
Rule Name	Ensure_Churn_Risk
Error Condition Formula	AND( ISPICKVAL(Status, "Active"), ISPICKVAL(Churn_Risk_Level, "High") )
Error Message	Enter a churn risk level.
Description	
Created By	Saemira.Bonilla: 27/09/2025, 5:04 pm
Modified By	Saemira.Bonilla: 27/09/2025, 5:04 pm

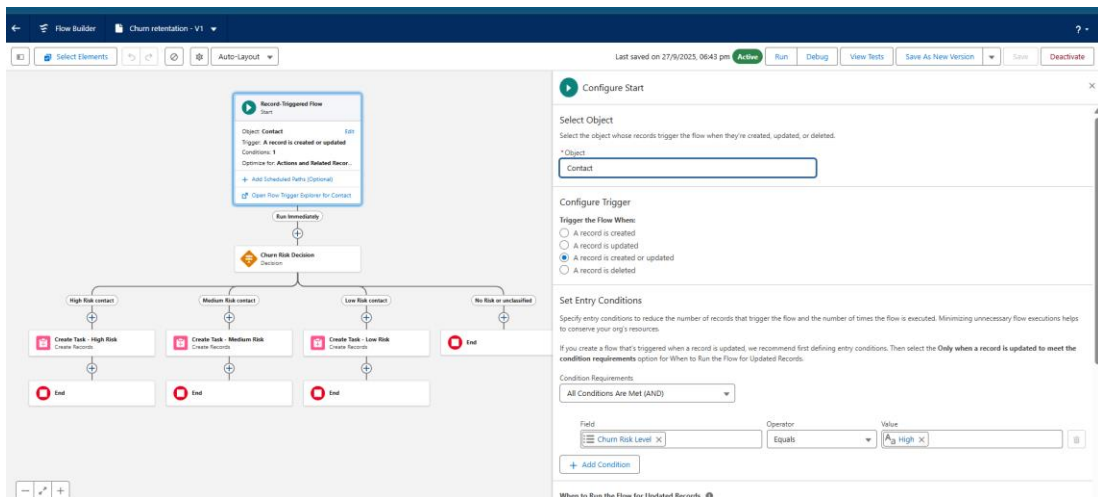
Buttons for 'Edit' and 'Close' are available for the Rule Name, Error Condition Formula, and the bottom of the detail section. The 'Active' status is checked.

## Workflow / Process Builder:

- Notify Admin/Support Agent when a customer is flagged as high-risk
- Auto-assign a default Retention Action based on churn risk if none is selected

## Flow Builder:

- Auto-create “At-Risk Customers” report based on churn risk levels
- Automate retention reminders and notifications triggered by churn risk decisions



## Email Alerts / Custom Notifications:

- Notify customers of retention offers, subscription renewal, or account updates
- Notify support agents when action is required for high-risk customers

The screenshot shows the Salesforce 'Workflow Rules' setup page. At the top, there's a 'SETUP Workflow Rules' header. Below it, the 'Workflow Rule' section is titled 'High Risk Retention'. A yellow banner at the top of the rule details area says: 'Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)'. Below this, the 'Workflow Rule Detail' section shows the rule is 'Active'. It lists the 'Rule Name' as 'High Risk Retention', 'Object' as 'Contact', and 'Evaluation Criteria' as 'Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria'. The 'Rule Criteria' is 'Contact: Churn Risk Level EQUALS High'. It also shows 'Created By' and 'Modified By' as 'Soumya Bonthu' with timestamps. The 'Workflow Actions' section is titled 'Immediate Workflow Actions' and lists two actions: 'Follow up with High-Risk Contact' (Task) and 'Retention Email Alert' (Email Alert). Below this, the 'Time-Dependent Workflow Actions' section is empty, with a message: 'No workflow actions have been added to this time trigger.' A yellow warning banner at the bottom states: 'You cannot add new time triggers to an active rule. [Deactivate This Rule](#)'.

## Phase 5: Apex Programming (Developer)

**Purpose:** Use Apex code for advanced automation based on churn risk.

**Examples:**

**Triggers:**

- Customer Insert → Assign default **Retention Action** based on churn risk
- Churn Risk Update → **Notify support agent** via email

**Helper Classes:**

- Calculate **churn status** (High, Medium, Low)
- Determine retention priority

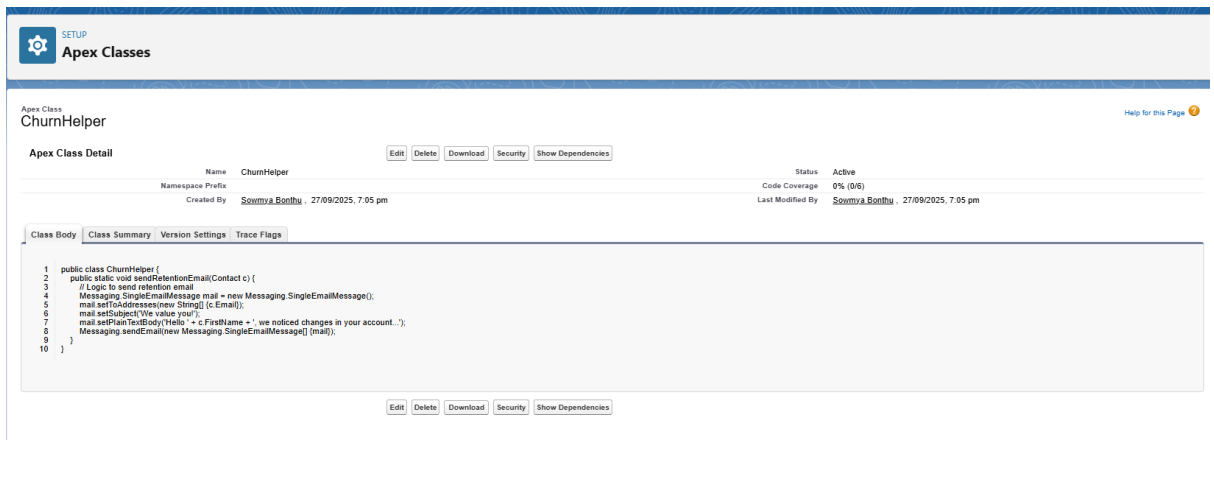
**Batch Apex / Queueable Apex:**

- Bulk update **at-risk customers** and send email alerts

**Test Classes:**

- For triggers and helper classes to meet Salesforce deployment requirements



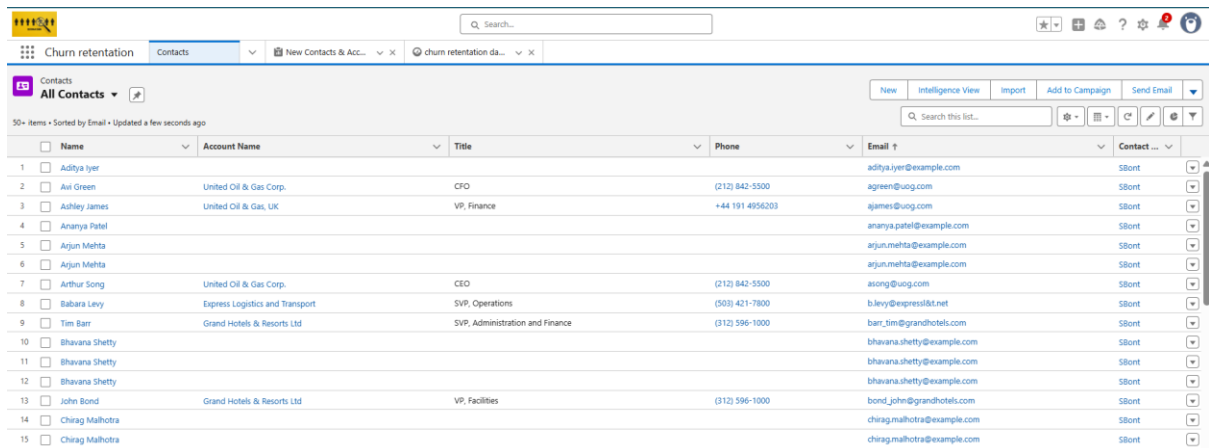


## Phase 6: User Interface Development

**Purpose:** Create a user-friendly experience for different roles.

**Steps:**

- Create Churn Retention App in Lightning App Builder



- **Add Tabs:** Accounts, Contacts, Leads, Reports, Dashboards, Churn, Prediction
- Customize Record Pages for Contacts and Churn objects
- **Home Page Layouts:** Dashboard showing High, Medium, Low-risk Customers, Retention Actions, and Support Agent Workload
- **Optional:** Lightning Web Component for customer search, churn prediction overview, or retention action tracking

Churn retention

Accounts

New Contacts & Acc...

churn retention da...

Accounts

All Accounts

New

Import

Printable View

Assign Label

Q Search this list...

13 items • Sorted by Account Name • Updated a few seconds ago

<input type="checkbox"/>	Account Name ↑	Account ...	Billing State/Province	Phone	Type	Account Owner Alias
1	<input type="checkbox"/> Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	SBont
2	<input type="checkbox"/> Dickenson plc		KS	(785) 241-6200	Customer - Channel	SBont
3	<input type="checkbox"/> Edge Communications		TX	(512) 757-6000	Customer - Direct	SBont
4	<input type="checkbox"/> Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	SBont
5	<input type="checkbox"/> GenePoint		CA	(850) 867-3450	Customer - Channel	SBont
6	<input type="checkbox"/> Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	SBont
7	<input type="checkbox"/> Pyramid Construction Inc.			(814) 427-4427	Customer - Channel	SBont
8	<input type="checkbox"/> Sample Account for Entitlements					autoprocc
9	<input type="checkbox"/> sForce		CA	(415) 901-7000		SBont
10	<input type="checkbox"/> United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	SBont
11	<input type="checkbox"/> United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	SBont
12	<input type="checkbox"/> United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	SBont
13	<input type="checkbox"/> University of Arizona		AZ	(520) 773-9050	Customer - Direct	SBont

Churn retention

Churn Predictions

New Contacts & Acc...

churn retention da...

Churn Predictions

Recently Viewed

9 items • Updated 2 minutes ago

<input type="checkbox"/>	Churn Prediction Name
1	<input type="checkbox"/> Sam Turner
2	<input type="checkbox"/> Nicole Adams
3	<input type="checkbox"/> Charlie Brown
4	<input type="checkbox"/> Stefanie Kim
5	<input type="checkbox"/> Alice Williams
6	<input type="checkbox"/> Bob Johnson
7	<input type="checkbox"/> Mark Wilson
8	<input type="checkbox"/> Jane Smith
9	<input type="checkbox"/> John Doe

Churn retention

Churn Predictions

New Contacts & Acc...

churn retention da...

Sam Turner | Churn P...

Churn Prediction

Sam Turner

Related

Details

Churn Prediction Name	Owner
Sam Turner	Sowmya Bonthu
Risk Level	
Low	
Recommendation	
Keep on retention watchlist	
Created By	Last Modified By
Sowmya Bonthu , 28/09/2025, 7:02 pm	Sowmya Bonthu , 28/09/2025, 7:02 pm

Contact

Aditya Iyer

Title

Account Name

Phone (2) ▼

Email

aditya.iyer@example.com

Contact Owner

Sowmya Bonthu

Related

Details

Contact Owner

Sowmya Bonthu

Name

Aditya Iyer

Account Name

Title

Department

Birthdate

Reports To

Churn Retention

Yes

Churn Risk Level

Medium

Last Interaction Date

07/09/2025

Total Purchases Last 6 Months

Number of Logins Last 6 Months

Phone

Home Phone

Mobile

Other Phone

Fax

Email

aditya.iyer@example.com

Assistant

Asst. Phone

## Phase 7: Integration & External Access

**Purpose:** Connect Salesforce with external systems to enhance churn prediction and retention actions.

- **Named Credentials:** Connect with third-party APIs (email services, SMS gateways, marketing platforms)

SETUP > NAMED CREDENTIALS

Churn\_Prediction\_API\_Credential

EditDelete

Label

Churn\_Prediction\_API\_Credential

Name

Churn\_Prediction\_API

Authentication Protocol

No Authentication

Managed Package Access

Created By Namespace

- **Platform Events:** Notify **support agents** when a customer’s churn risk changes or a retention action is assigned
- **Remote Site Settings:** Allow external API access for sending notifications or fetching customer engagement data

SETUP Remote Site Settings

Remote Site Details [Help for this Page](#)

Remote Site Detail

Remote Site Name	Churn_Prediction_API_Site	Modified By	Soumya Borithu, 28/09/2025, 10:51 pm
Remote Site URL	https://api.churnpredict.com		
Disable Protocol Security	Allowed Salesforce to call the churn prediction API		
Description	Allows Salesforce to call the churn prediction API		
Active	<input checked="" type="checkbox"/>		
Created By	Soumya Borithu, 28/09/2025, 10:51 pm		

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## Phase 8: Data Management & Deployment

**Purpose:** Ensure data integrity, smooth migrations, and secure management of customer and retention data.

### 1. Data Import Wizard (UI-based import)

- **Use Case:** Upload small datasets like sample **Contacts**, **Churn Risk**, or **Retention Actions** for testing.
- **Steps:**
  1. Go to App Launcher → search **Data Import Wizard**.
  2. Scroll down to Custom Objects → Select **Contact** or **Churn Risk**.
  3. Click **Launch Wizard**.
  4. Upload CSV (e.g., Name, Email, Churn Risk Level, Retention Action).
  5. Map fields → Click **Start Import** → Records uploaded.

### 2. Data Loader (Bulk Import/Export)

- **Use Case:** Upload large datasets (e.g., 500+ Contacts at once) or perform updates.
- **Steps:**
  1. Setup → search **Data Loader** → Download & Install.
  2. Open → Log in with Salesforce credentials.
  3. Choose operation: Insert, Update, insert, Delete, Export.

4. Example: Insert → Contact or Churn Risk object → Upload CSV → Map fields → Run.

### 3. Duplicate Rules (Data Quality Control)

- **Use Case:** Prevent duplicate customer records (same email or phone).
- **Steps:**
  1. Setup → search **Duplicate Rules** → New Rule → Select **Contact**.
  2. Define rule: Check **Email or Phone**.
  3. Action: Alert or Block → Save & Activate.

### 4. Change Sets / Deployment

- **Use Case:** Move **Contacts, Churn Risk, Retention Actions, Reports, Dashboards** from sandbox → production.
- **Steps:**
  1. Setup → search **Outbound Change Sets** → Create new → Name: “Churn Retention Deployment”.
  2. Add Components → Upload → Target Org → Approve & Deploy.

### 5. Export / Backup

- **Use Case:** Monthly backup of Contacts & Churn Risk data.
- **Steps:**
  1. Setup → search **Data Export** → Select **Contacts, Churn Risk, Retention Actions**.
  2. Frequency: Monthly → Salesforce generates ZIP with CSVs → Download.

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## Phase 9: Reporting, Dashboards & Security Review

**Purpose:** Track customer churn, retention effectiveness, and team performance.

**Reports:**

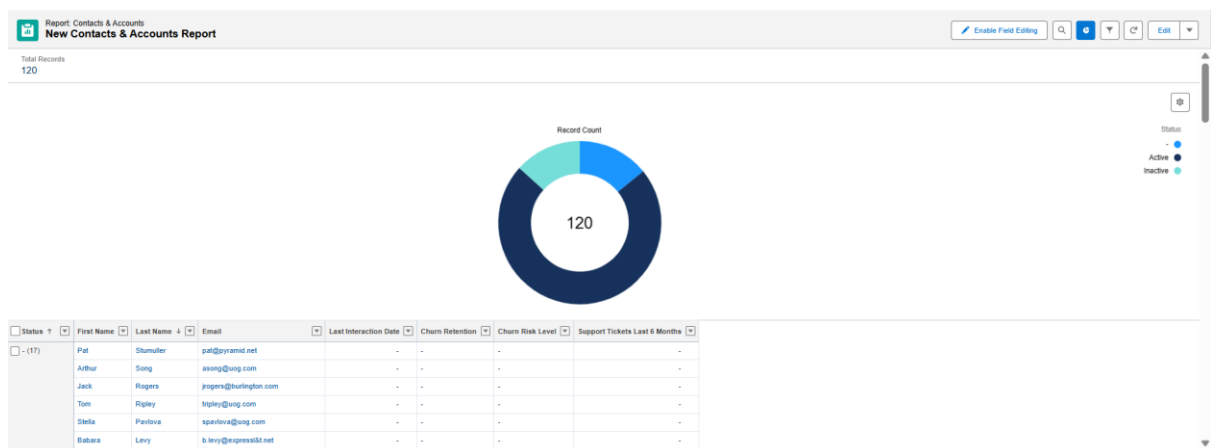
- At-Risk Customers by Churn Level (High, Medium, Low) – Summary or Matrix
- Retention Actions Completed by Support Agent – Summary
- Customers per Retention Action Type – Tabular

Churn retentation Reports

Search...

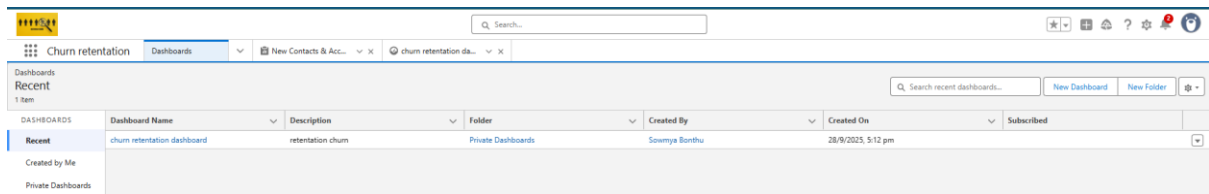
Reports Recent 53 items

REPORTS	Report Name	Description	Folder
Recent	New Contacts & Accounts Report		Private Reports



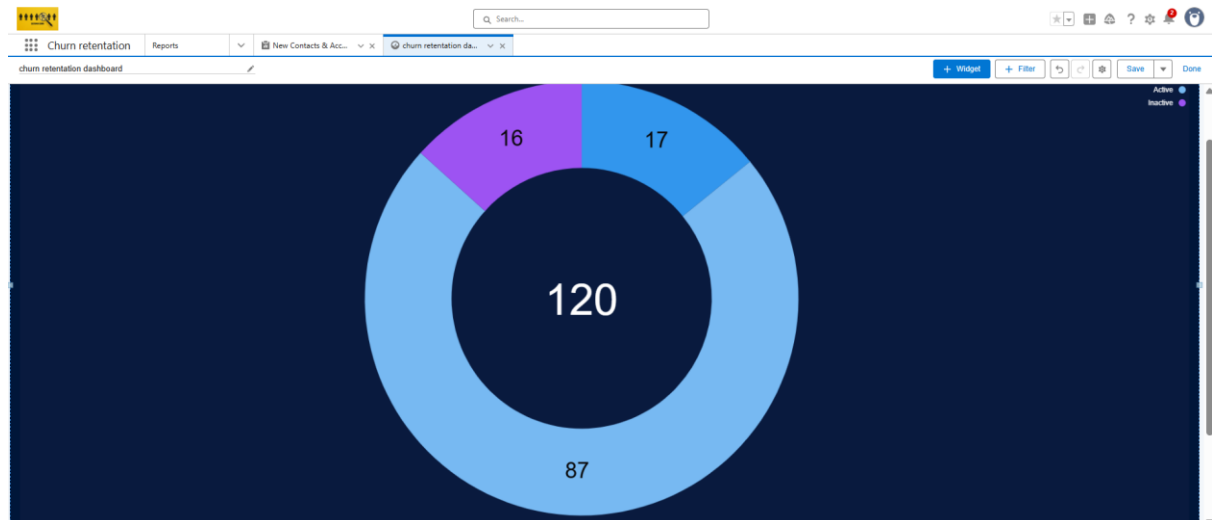
## Dashboards:

- Donut Chart → High vs Medium vs Low-risk Customers
- Bar Chart → Customers handled per Support Agent
- Line/Trend Chart → Retention action success over time



The screenshot shows the Salesforce interface with the 'Churn retention' dashboard selected. The dashboard list table is as follows:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	churn retention dashboard	retention churn	Private Dashboards	Sowmya Bonthu	28/9/2025, 5:12 pm	



## Security:

- Field-Level Security for sensitive data (Email, Subscription Details)
- Sharing Rules applied for role-based access (Admin > Support Agent > Assistant)
- Audit Trail for all changes in Churn Risk and Retention Actions

## Phase 10: Final Presentation & Demo Day

**Purpose:** Showcase the project and demonstrate its features.

**Pitch:** Explain the **customer churn problem**, your **Salesforce solution**, and key **Churn Retention features**.

## Demo Walkthrough:

1. Create a new **Contact / Customer**
2. Assign **Churn Risk Level** (High, Medium, Low)
3. Assign or trigger **Retention Action** based on risk

4. Show **dashboards**: At-Risk Customers, Retention Actions, Support Agent Workload

**Feedback Collection:** Gather input from mentors, peers, or stakeholders

**Handoff Documentation:** Include project report, screenshots, and GitHub repository (if any)

**Portfolio Showcase:** Add project to LinkedIn, resume, or personal portfolio to highlight Salesforce and churn retention skills