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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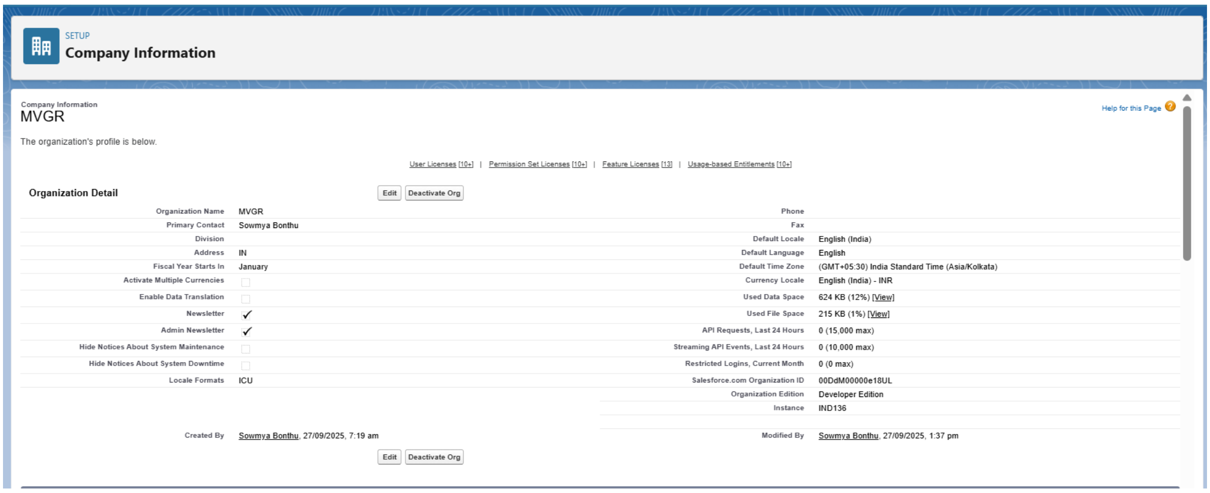
Phase 2: Org Setup & Configuration

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

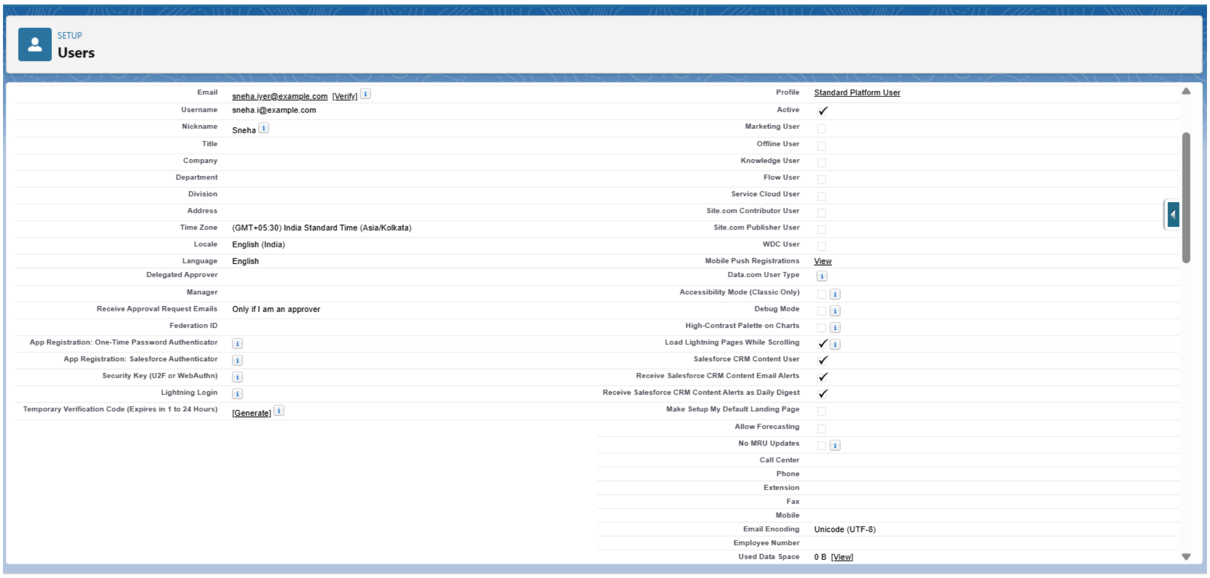


3. Business Hours & Holidays: Mon–Sun, 9 AM – 8 PM; include public holidays for support follow-ups

4. Fiscal Year: Standard

5. User Setup & Licenses: Create sample users:

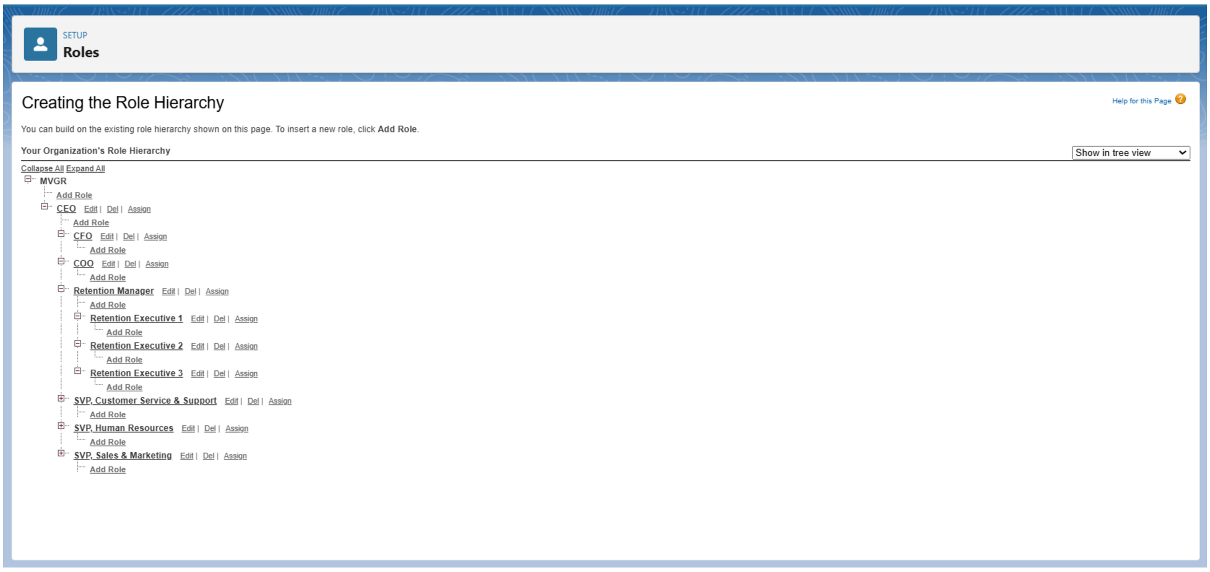
- Admin: Full access to all customer data, retention actions, and dashboards
- Support Agent/Marketer: Manage at-risk customers, execute follow-ups, and update retention actions
- Receptionist/Assistant (optional): Create new customer records only



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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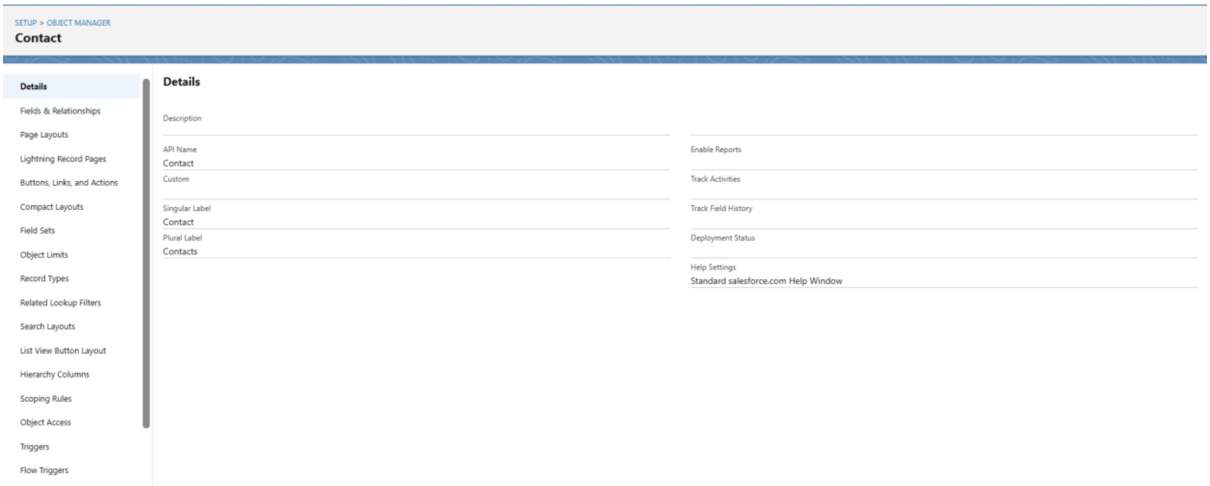
Phase 3: Data Modeling & Relationships

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

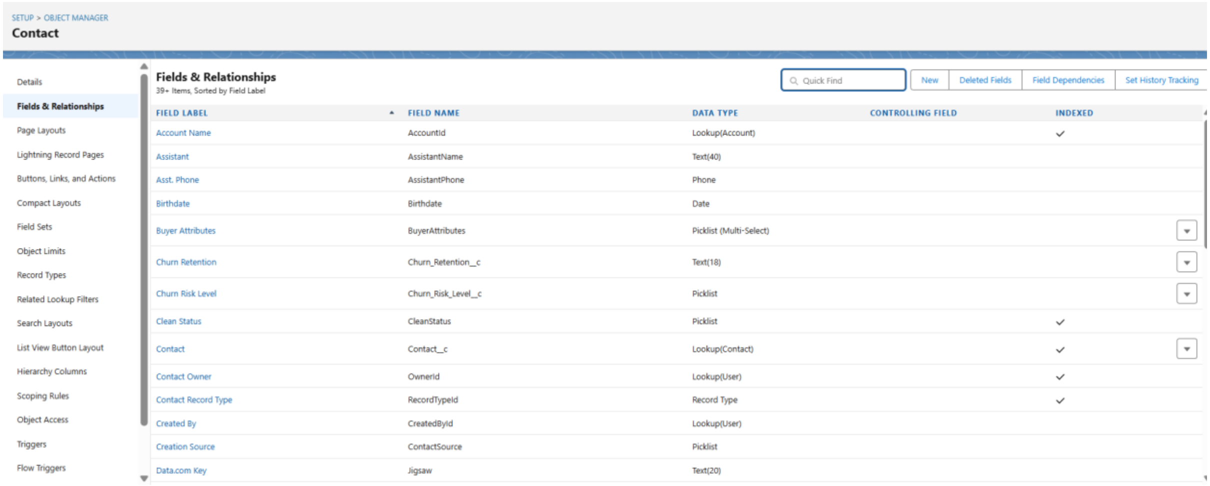
Custom Objects:

- **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**



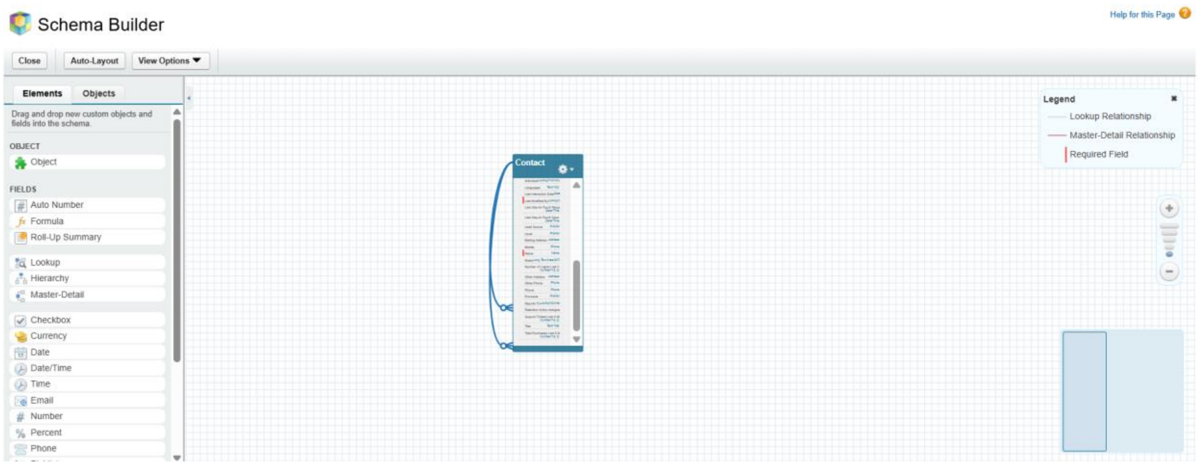
Relationships:

- **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)



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

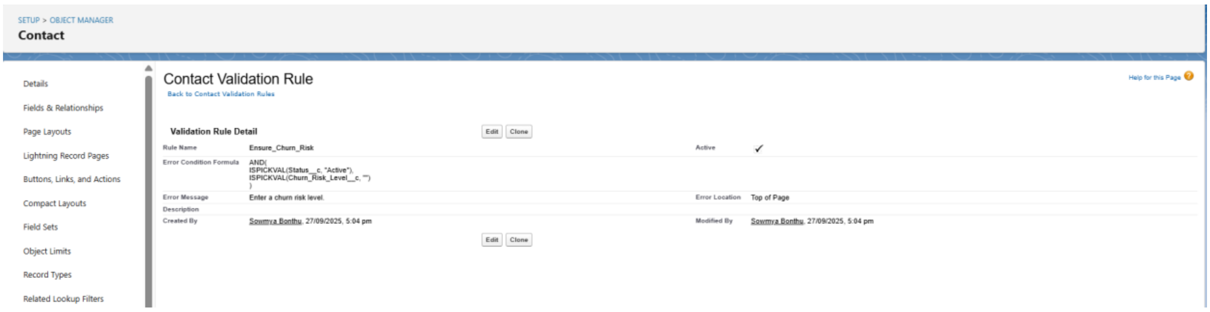


Phase 4: Process Automation (Admin)

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

Automation Examples:

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

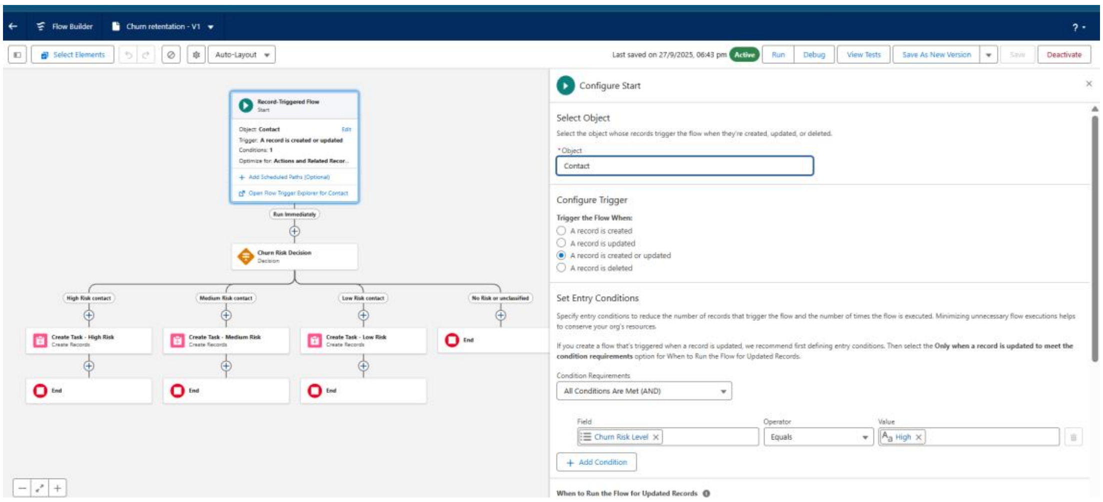


Workflow / Process Builder:

- 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

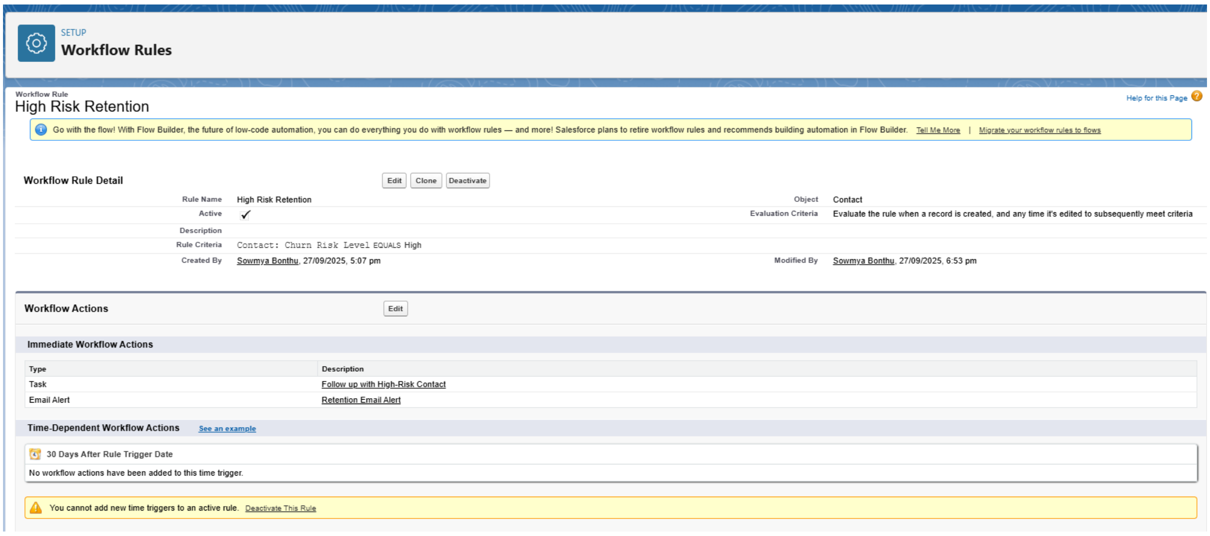
Flow Builder:

- 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



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:

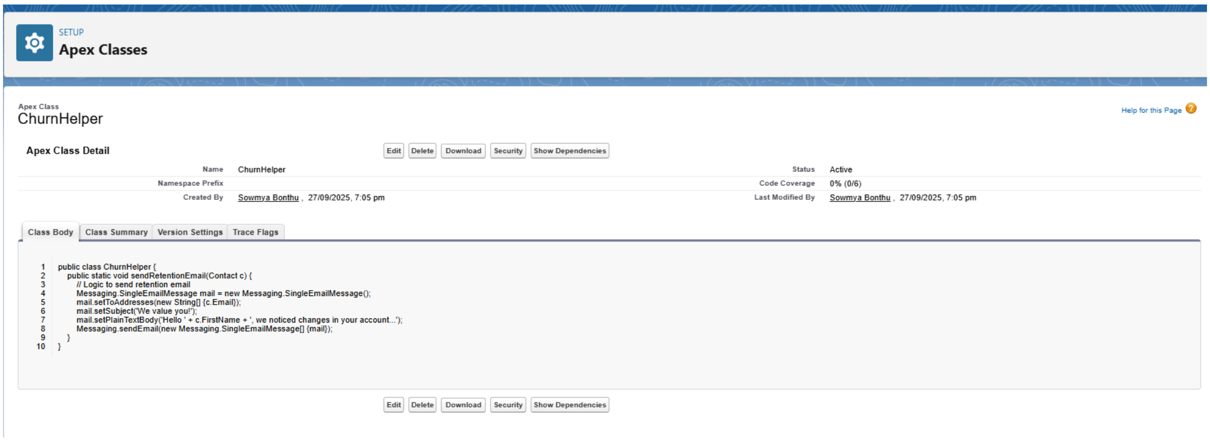
- Calculate **churn status** (High, Medium, Low)
- Determine retention priority

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

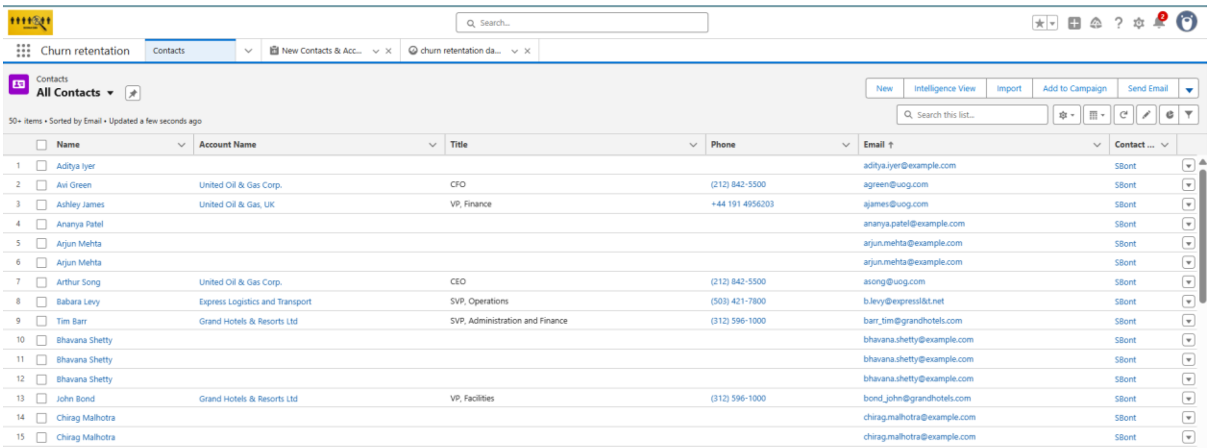


Phase 6: User Interface Development

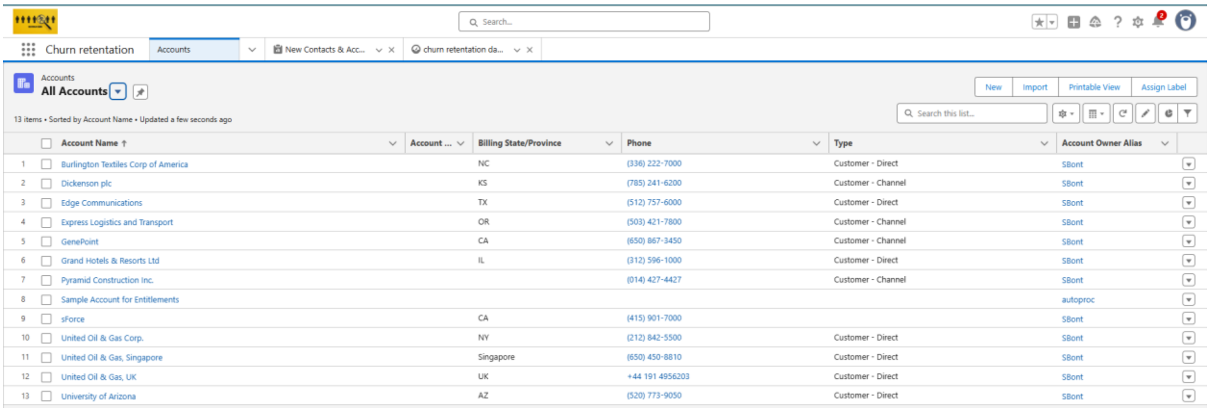
Purpose: Create a user-friendly experience for different roles.

Steps:

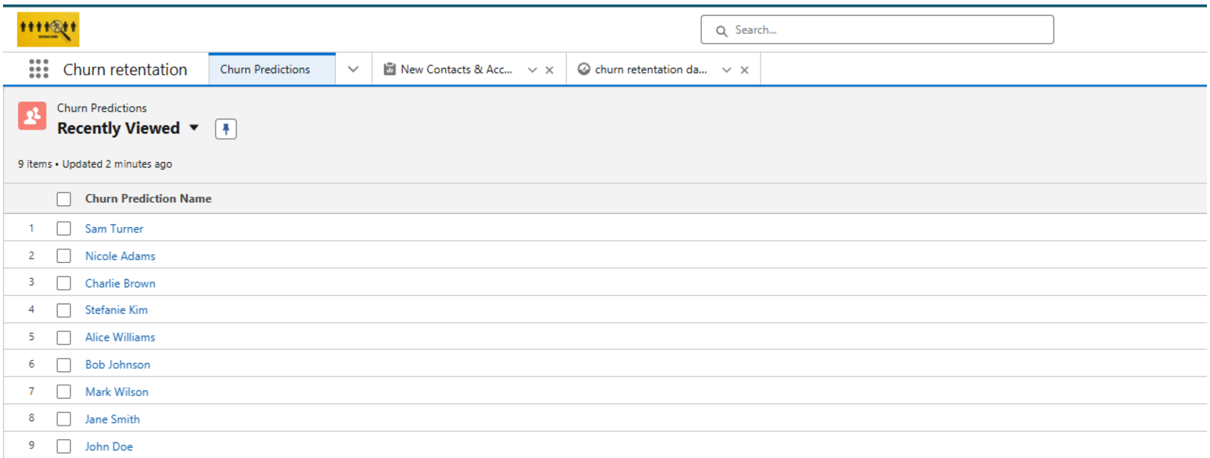
- Create Churn Retention App in Lightning App Builder

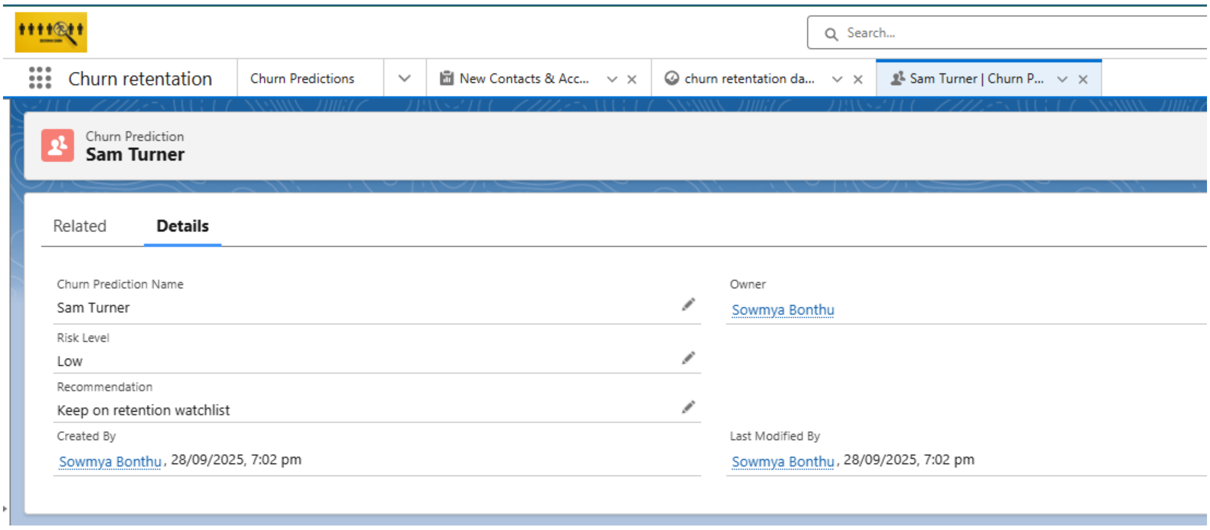


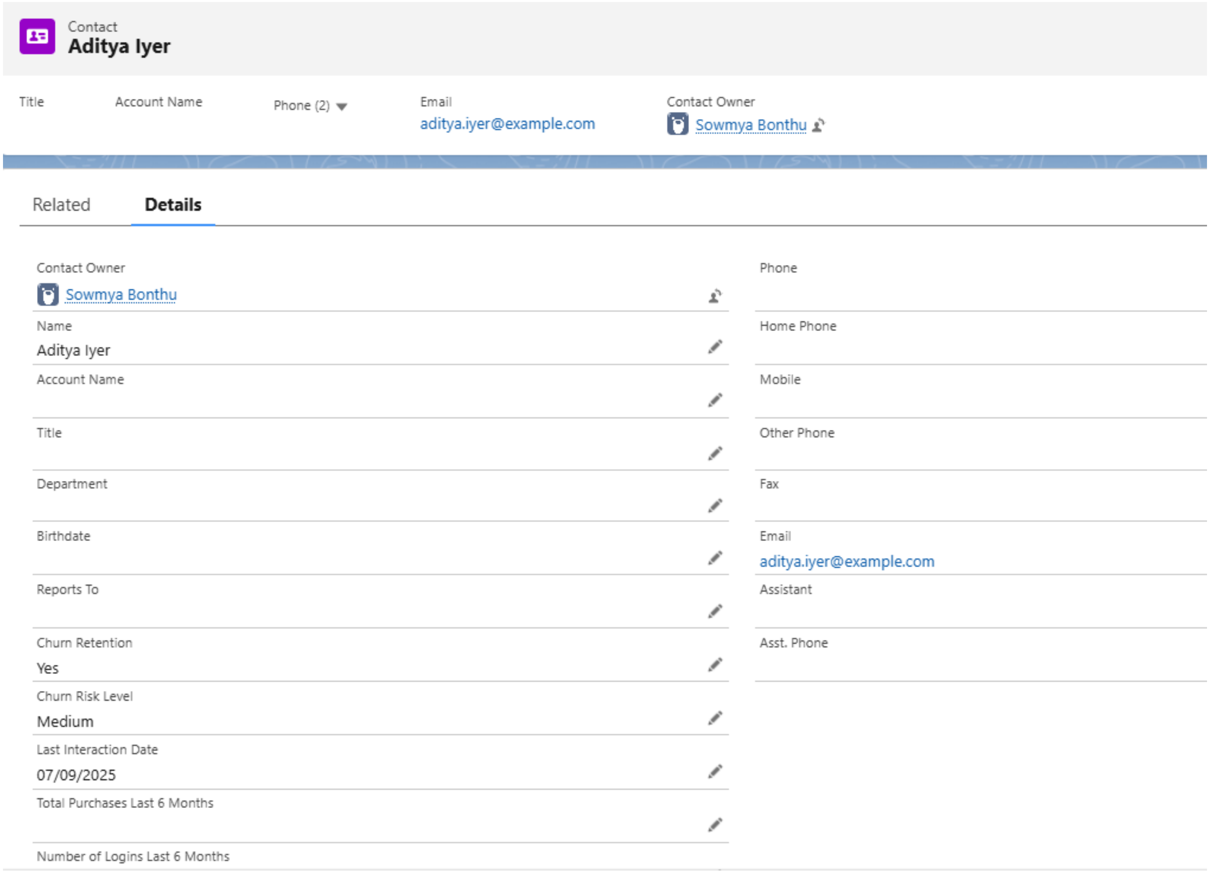
- **Add Tabs:** Accounts, Contacts, Leads, Reports, Dashboards, Churn, Prediction
- Customize Record Pages for Contacts and Churn objects
- **Home Page Layouts:** Dashboard showing High, Medium, Low-risk Customers, Retention Actions, and Support Agent Workload
- **Optional:** Lightning Web Component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



	Account Name	Account ...	Billing State/Province	Phone	Type	Account Owner Alias
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	SBont
2	Dickenson plc		KS	(785) 241-6200	Customer - Channel	SBont
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	SBont
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	SBont
5	GenePoint		CA	(650) 867-3450	Customer - Channel	SBont
6	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	SBont
7	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	SBont
8	Sample Account for Entitlements					autoproc
9	sForce		CA	(415) 901-7000		SBont
10	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	SBont
11	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	SBont
12	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	SBont
13	University of Arizona		AZ	(520) 773-9050	Customer - Direct	SBont



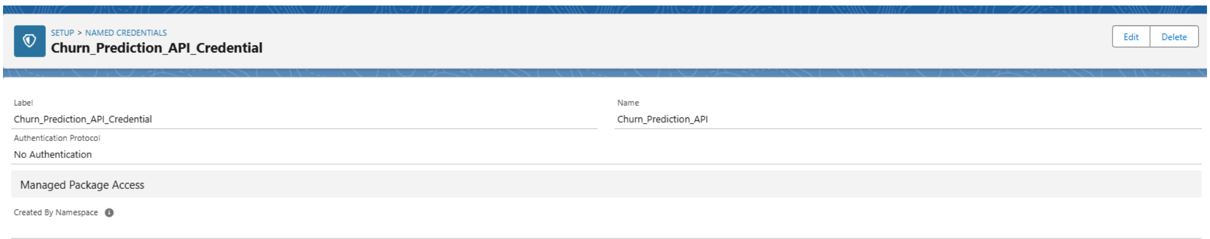




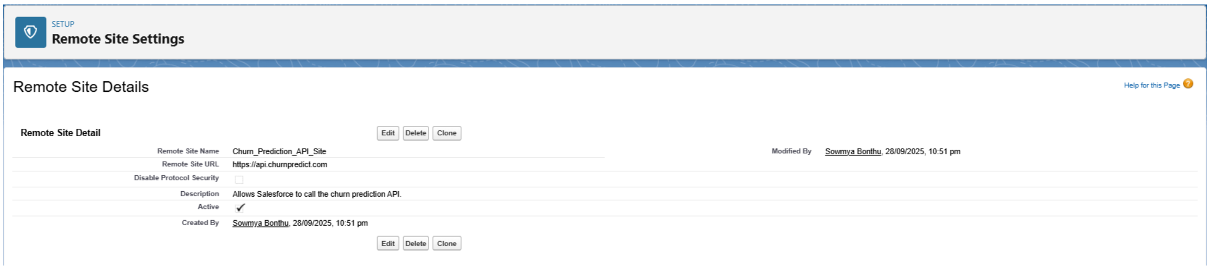
Phase 7: Integration & External Access

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)



- **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



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

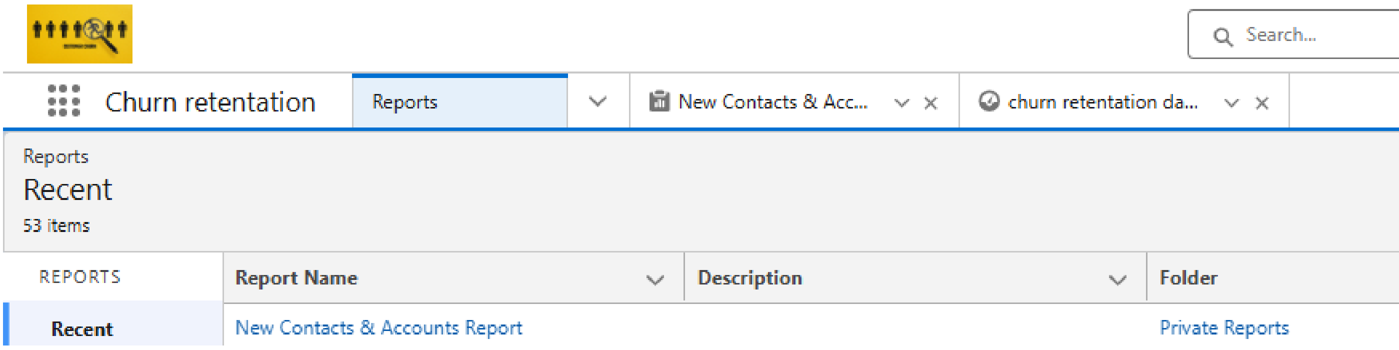
- **Use Case:** Monthly backup of Contacts & Churn Risk data.
- **Steps:**
  1. Setup → search **Data Export** → Select **Contacts, Churn Risk, Retention Actions**.
  2. Frequency: Monthly → Salesforce generates ZIP with CSVs → Download.

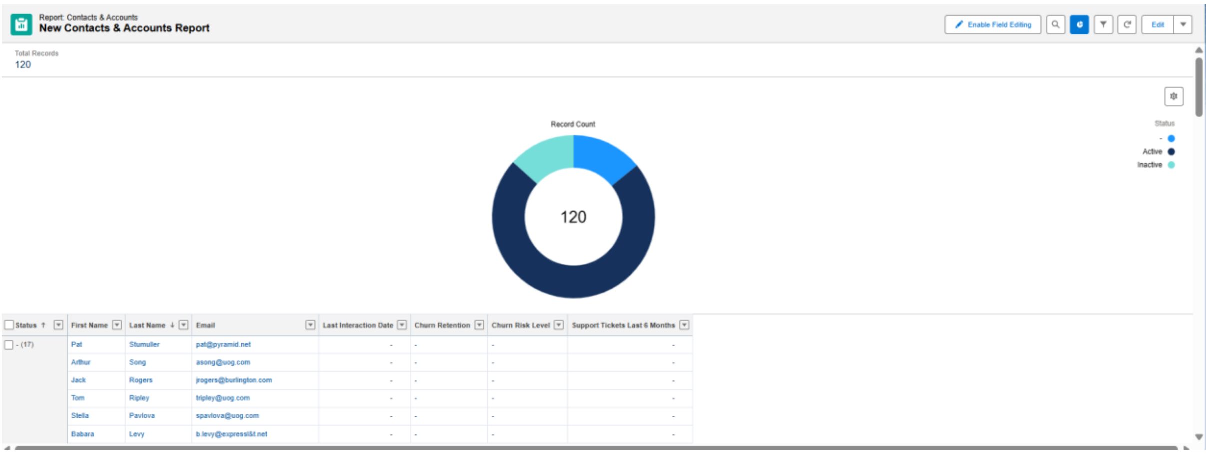
Phase 9: Reporting, Dashboards & Security Review

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

Reports:

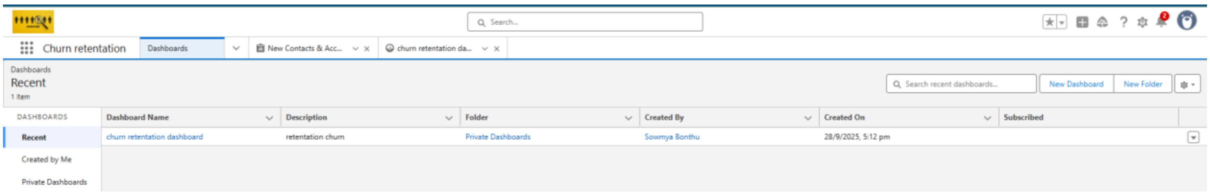
- At-Risk Customers by Churn Level (High, Medium, Low) – Summary or Matrix
- Retention Actions Completed by Support Agent – Summary
- Customers per Retention Action Type – Tabular

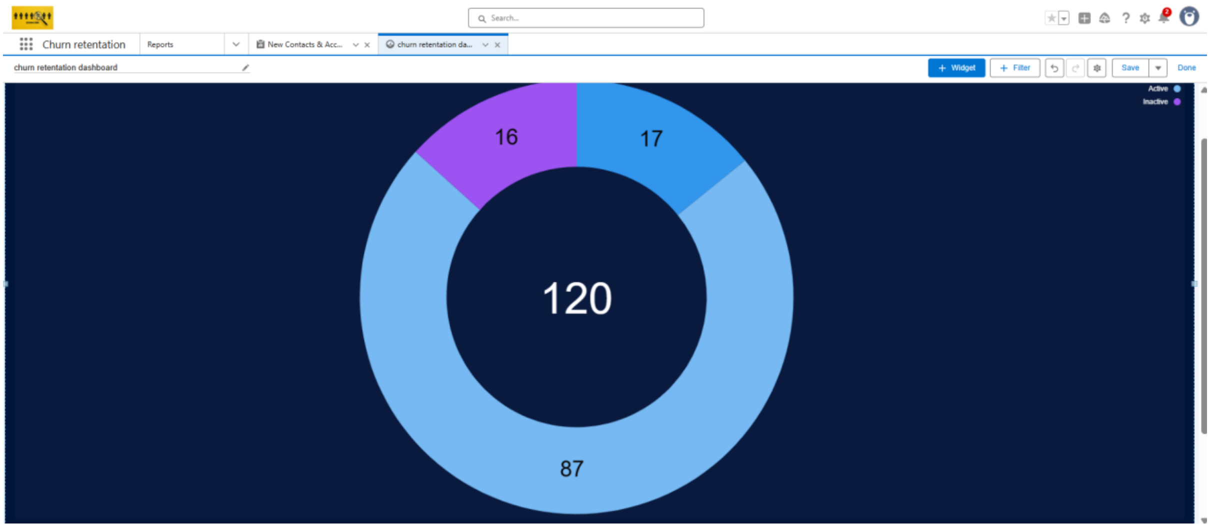




Dashboards:

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





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

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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