Smart Retail Promotions & Discount CRM

Phase 1: Problem Understanding & Industry Analysis

☞ Goal: Understand what we're building and why.

1. **Requirement Gathering**

   ○ Talk to stakeholders (Retail Store Manager, Marketing Team, Customer Service).

   ○ Example requirement:

      ■ Track all active promotions and discounts with validity.
      ■ Allow personalized discount allocation to loyal customers.
      ■ Prevent overlapping promotions on the same product.
      ■ Generate sales uplift and ROI reports.

2. **Stakeholder Analysis**

   ○ **Admin** (you, managing CRM setup).

   ○ **Marketing Team** (create/manage promotions and campaigns).

   ○ **Store Manager** (approves high-value discounts, monitors sales impact).

   ○ **Customer** (end users who redeem offers).

3. **Business Process Mapping**

   ○ Draw a flow:
      Customer requests booking → CRM checks eligibility → Promotion applied →
      Approval (if high value) → SMS/Email sent to customer → Store/POS updated.

4. **Industry-specific Use Case Analysis**

   ○ In the retail industry, promotions must align with inventory levels and seasonal demand.

   ○ Real-time discount tracking, customer segmentation, and automated notifications are essential.

5. **AppExchange Exploration**

   ○ Look for "Retail Promotions/Discount CRM" apps. Some exist, but we'll build a simpler custom solution to learn.