Retail Sector – Hyper-Personalized Loyalty & Feedback CRM

Problem Statement

Retail chains and e-commerce businesses struggle to retain customers despite offering loyalty programs. Most customers receive generic discounts or promotions, which reduces engagement and fails to build brand loyalty. Additionally, real-time customer feedback is often ignored or collected in silos, leading to delayed responses and poor customer experience. A CRM solution is needed that integrates loyalty management with personalized offers and real-time feedback tracking, ensuring higher customer satisfaction and retention.

Project Overview

The proposed solution is a Salesforce-based Customer Loyalty & Feedback CRM designed for retail businesses. This system will track individual customer purchases, preferences, and loyalty points, while simultaneously collecting feedback from surveys, service interactions, or even social media sentiment. Based on this data, the system will automatically generate personalized offers and escalate negative feedback to managers for quick resolution.

- **Users**: Store managers, customer support teams, marketing teams, and customers.

- **Impact**: Enhances customer loyalty, improves response to negative experiences, and boosts

overall sales through targeted campaigns.

Objectives

1. **Personalized Loyalty Management** – Track purchase history to provide customer-specific

offers instead of generic discounts.

2. **Real-Time Feedback Tracking** – Collect feedback directly from surveys, SMS, or social media

integrations.

3**. Customer Retention** – Use predictive analytics to identify at-risk customers and engage them

proactively.

4. **Automated Campaigns** – Run Salesforce Marketing Cloud campaigns with segmented offers

for high-value customers.

5**. Enhanced Customer Experience** – Resolve negative feedback faster through automatic case

creation and escalation.

6. **Data-Driven Insights** – Provide dashboards showing loyalty program effectiveness, customer

churn, and satisfaction scores.

Salesforce Concepts to be Used

- **Custom Objects & Relationships:** Customer, Purchase History, Loyalty Points, Feedback,

Offers.

- **Automation** (Flows, Process Builder, Apex Triggers if needed): Auto-assign loyalty points on

purchase, auto-generate offers based on trends, auto-create cases for negative feedback.

- **Validation Rules**: Ensure feedback submissions are linked to valid customers.

- **Reports & Dashboards**: Track top 10 loyal customers, churn probability, feedback sentiment

trends.

- **Salesforce Service Cloud**: Manage complaints and feedback escalations.

- **Salesforce Marketing Cloud / Journey Builder**: Run email/SMS campaigns with personalized

promotions.

- **Einstein Analytics / AI:** Predict churn risk and recommend offers.

- **Security & Sharing Settings**: Role-based access for managers, marketing teams, and service agents.