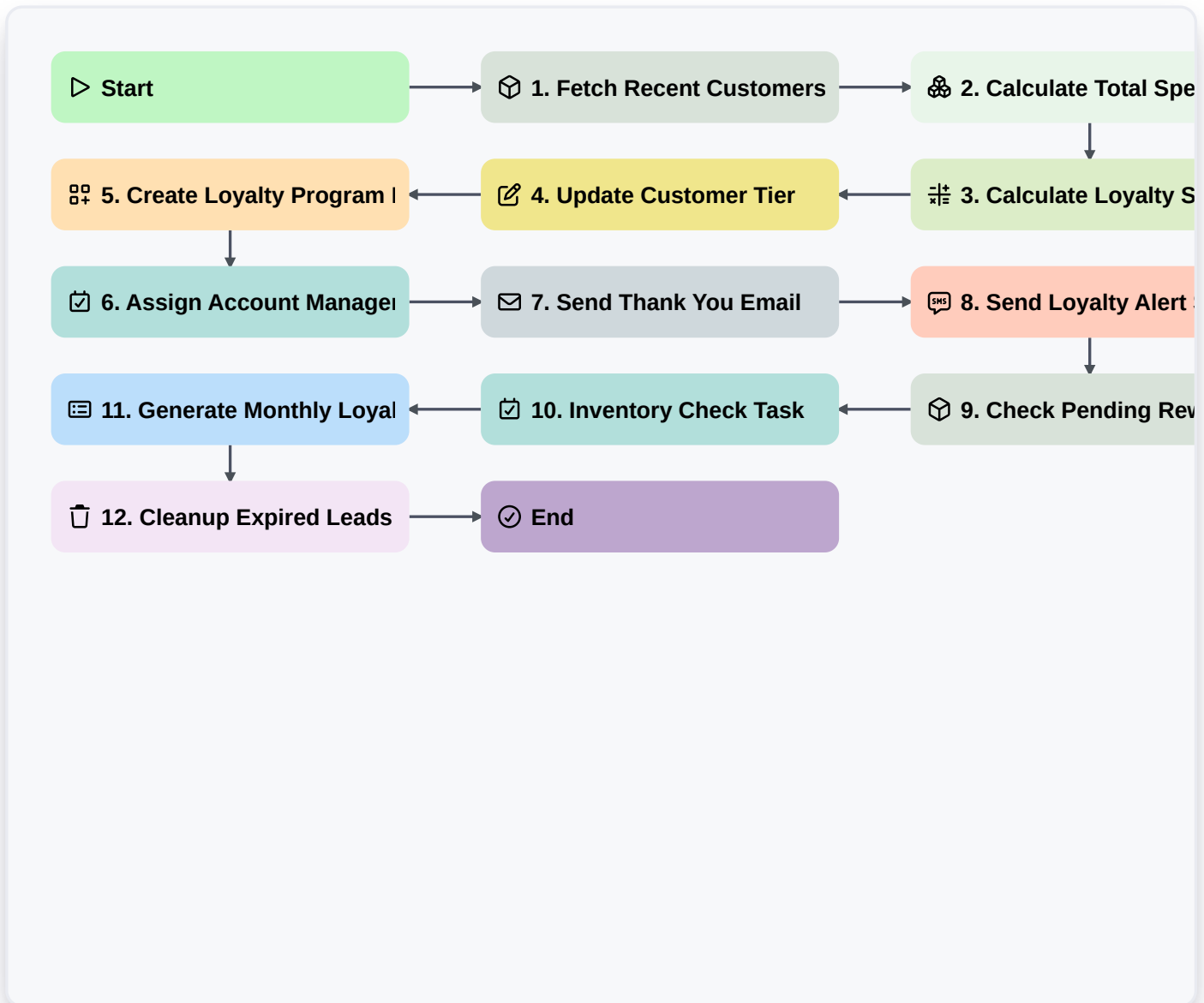


Customer Loyalty And Follow-Up Workflow



▷ Start

Start of the Workflow/Process.

📦 1. Fetch Recent Customers

Retrieve all customer entries from the Customer Data Model created in the last 30 days.

🔗 2. Calculate Total Spend

Sum the 'Total Order Value' from all retrieved customer entries to identify high-value segments.

📊 3. Calculate Loyalty Score

Calculate a score based on total spend and frequency of orders using a weighted formula.

✍️ 4. Update Customer Tier

Update the 'Loyalty Tier' field in the Customer Data Model based on the calculated score.

📝 5. Create Loyalty Program Entry

Create a new entry in the Loyalty Rewards table for customers who reached the Gold tier.

📅 6. Assign Account Manager Follow-up

Create a task for the assigned Account Manager to call high-value customers.



✉ **7. Send Thank You Email**

Send an automated appreciation email to the customer including a personalized discount code.

📱 **8. Send Loyalty Alert SMS**

Send a short SMS notification to customers when they hit a new reward milestone.

📦 **9. Check Pending Rewards**

Retrieve entries from the Rewards table that are marked as 'Pending' but not yet 'Redeemed'.

📅 **10. Inventory Check Task**

Create a task for the Warehouse team to ensure physical rewards are in stock for upcoming redemptions.

📄 **11. Generate Monthly Loyalty Report**

Create a summary report of all loyalty tier changes and total rewards issued during the month.

🗑️ **12. Cleanup Expired Leads**

Delete temporary guest entries that have failed to convert to customers after the follow-up period.

🏁 **End**

End of the Workflow/Process.