

Ideation Phase

Define the Problem Statements

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Project Name: Family Expense Automation Using ServiceNow

Customer Problem Statement Template:

Families often struggle with tracking their daily expenses manually, leading to poor financial visibility, data loss, and budgeting errors. Without automation, families spend unnecessary time maintaining spreadsheets or handwritten records, which are prone to mistakes and inconsistencies. The absence of an integrated platform makes it hard to monitor real-time spending or set alerts for over-budget expenses. They need a ServiceNow-based solution that automates expense tracking, categorization, and reporting with dashboards accessible to all family members. This ensures accuracy, transparency, and smarter financial decisions — reducing stress and improving household collaboration.



Fig1: Family reviewing expenses together using digital tools.

Reference: <https://miro.com/templates/customer-problem-statement/>

Example:

I am (Customer)	I'm trying to	But	Because	Which makes me feel
A Parent	Track and manage monthly family expenses	I spend hours updating spreadsheets	there's no automated categorization or reminders	frustrated, unorganized, and anxious about overspending

Problem Statement PS 1:

As a parent managing household finances, I try to record every expense manually, but it becomes time-consuming and error-prone. Without automation, I often miss payments or misclassify expenses, leading to inaccurate monthly summaries. This makes me feel stressed and uncertain about where the money is going. I need an automated ServiceNow system that categorizes expenses and generates real-time spending dashboards.



Fig2: Real-time dashboard visualizing categorized expenses and savings trends.

Problem Statement PS 2:

As a family member contributing to shared expenses, I want to log my spending easily from my phone or laptop. However, we currently use different apps or notes, which makes it difficult to consolidate and analyze our total spending. This fragmentation causes confusion and reduces accountability. I need a unified ServiceNow portal where all members can enter data and view a shared financial summary instantly.

Summary:

This project brings a creative and human-centric approach to family finance management by using ServiceNow automation. The system simplifies tracking, enhances visibility, and encourages collaboration — turning financial management into a smart, effortless routine.