Problem Statement Document
Title: Wildlife Conservation CRM

1. Problem

Wildlife conservation organizations face difficulties in tracking species data, managing conservation projects, coordinating volunteers, and maintaining donor information. Relying on manual spreadsheets or disconnected systems leads to data inconsistencies, poor communication, limited transparency, and inefficient resource allocation. This hampers conservation efforts, reduces donor/volunteer engagement, and restricts access to actionable insights for protecting wildlife and ecosystems.

2. Objectives

- Build a centralized Salesforce system to manage species, habitats, conservation projects, volunteers, donors, and researchers.

- Automate volunteer onboarding, donation tracking, communication workflows, and project updates.

- Provide real-time dashboards and reports for monitoring species conservation, donation impact, and volunteer engagement.

- Ensure data validation, duplicate checks, and secure, role-based access for Conservation Managers, Volunteers, Donors, and Researchers.

3. Scope

The Salesforce CRM application will include:

- Custom objects for Species, Habitat, Conservation Project, Volunteer, Donor, Researcher, and Activity Log.

- Automation with validation rules, duplicate prevention, triggers, batch processes, and email/SMS notifications.

- Lightning Web Components for project creation, species/habitat details, volunteer/donor management, and community engagement.

- Role-based access, sharing rules, and community setup for Volunteers and Donors to register, track contributions, and view updates.

- Integration with external APIs (e.g., GIS or biodiversity databases) for habitat mapping and species data validation.

4. Impact

The CRM will reduce manual effort, improve coordination, and ensure transparency in wildlife conservation activities. It will enhance volunteer and donor engagement, provide accurate insights into conservation progress, and support data-driven decision-making. By centralizing operations, the system allows organizations to focus on their

core mission—protecting wildlife and ecosystems—rather than administrative challenges.