

Project Title: Wildlife Conservation CRM

Phase: 1

Problem Statement:

Wildlife conservation organizations face challenges in monitoring species, managing volunteers, tracking donations, and coordinating conservation activities. Manual methods such as spreadsheets, paper records, or disconnected systems lead to data errors, miscommunication, inefficiency, and lack of transparency. This results in poor tracking of conservation efforts, reduced donor/volunteer engagement, and limited insights for decision-making.

The Wildlife Conservation CRM aims to address these issues by providing a Salesforce-based application that:

- Centralizes records of species, habitats, volunteers, donors, and conservation projects.
 - Automates volunteer onboarding, donation tracking, and communication workflows.
 - Ensures data validation, duplicate prevention, and secure, role-based access.
 - Provides dashboards and reports for real-time monitoring of conservation efforts, donations, and volunteer participation.
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Problem Understanding & Industry Analysis

This phase focuses on analyzing wildlife conservation operations, identifying stakeholder needs, and aligning the CRM solution with global conservation best practices. The key activities include:

1. Requirement Gathering

- Understand the needs of wildlife organizations: species monitoring, volunteer management, donor tracking, and habitat/project coordination.
- Key requirements include automated volunteer registration, donation receipts, habitat/project updates, duplicate prevention, and real-time reporting.

2. Stakeholder Analysis

- **Admin:** Configures and maintains the Salesforce CRM system.
- **Conservation Manager:** Creates and monitors projects, tracks species, assigns volunteers, and manages donors.
- **Volunteer:** Registers for activities, tracks participation, and receives updates.

- **Donor:** Contributes funds/resources and tracks donation impact.
- **Researcher:** Records species and habitat data, provides conservation insights.

3. Business Process Mapping

Example Flow: Project is created → Conservation manager assigns species, location, and volunteers → Volunteer registers → System validates participation and availability → Donor receives donation confirmation → Dashboards update in real time → Managers track conservation impact and stakeholder engagement.

4. Industry-Specific Use Case Analysis

- Conservation projects require accurate data on species, habitats, volunteers, and donors.
- Errors in tracking or reporting reduce conservation effectiveness and damage credibility.
- Automated communication ensures better volunteer and donor engagement.
- Dashboards and reports provide insights for improving future conservation strategies and resource allocation.

5. AppExchange Exploration

While Salesforce AppExchange offers donor/NGO management solutions, this project focuses on a **custom-built CRM** to:

- Gain hands-on experience with Salesforce platform development.
- Implement best practices in object modeling, automation, and Lightning Web Components.
- Address Wildlife Conservation's specific requirements for species, habitat, volunteer, and donor management.