

Ideation Phase

Define the Problem Statement

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Team ID	NM2023TMID04665
Project Name	Build an Event Management System using Salesforce

Defining The Problem:

A Problem statement often touches on the 5 w's (who, what, where, when, why) of the problem. In other words, where and when does the problem occur, who or what does it affect, and how does it affect them.

Problem Statement:

Questions	Description
Who does the problem affect?	<p>Event Organizers/Planners: They will be using the system to plan, coordinate, and execute events. They will need to input event details, manage attendees, speakers, and vendors, and monitor event performance.</p> <p>Attendees: They will interact with the system to register for events, provide feedback, and receive event-related information such as schedules and location details.</p> <p>Vendors: Vendors will use the system to register their services, receive event bookings, and potentially interact with event organizers for additional details and coordination.</p> <p>Speakers: Speakers will use the system to provide their information, view their speaking engagements, and potentially communicate with event organizers.</p> <p>Administrators/Managers: They will have oversight of the entire system and will be responsible for managing user accounts, overseeing events, generating reports, and ensuring compliance with data security and privacy regulations.</p> <p>System Developers/IT Personnel: They will be involved in building, deploying, and maintaining the system. They will work on the technical aspects of the Salesforce platform and any integrations with external systems.</p> <p>End Users (Non-administrative): This could include employees of the organization using the system for event-related tasks, such as registering for events or providing feedback.</p> <p>Compliance and Privacy Officers: They will be concerned with ensuring that the system adheres to relevant data protection and privacy regulations (e.g., GDPR, HIPAA).</p>

What are the boundaries of the problem?

Scope of Objects:

The system will primarily focus on four main objects: Event, Attendees, Vendor, and Speakers. Additional objects or functionalities may be added in the future, but for now, these are the core elements.

Event Management Functionality:

The system will facilitate the planning, coordination, and execution of events, as well as the management of attendees, vendors, and speakers.

Salesforce Platform:

The system will be built on the Salesforce platform, utilizing its features and capabilities for data management, user authentication, and workflow automation.

Data Privacy and Security:

The system will comply with relevant data privacy regulations (e.g., GDPR, HIPAA) to ensure the protection of sensitive information.

Integration with External Systems (if applicable):

The system may integrate with external systems for tasks such as sending invitations, collecting RSVPs, or managing payment processing.

User Roles and Permissions:

The system will define specific roles (e.g., Event Organizer, Attendee, Vendor) with corresponding permissions and access levels.

Reporting and Analytics:

The system will provide reporting and analytics capabilities for tracking event performance, attendee satisfaction, vendor performance, and speaker effectiveness.

User Interface Design:

The system will have a user-friendly interface for managing events, attendees, vendors, and speakers. However, it may not encompass extensive design customization beyond Salesforce's capabilities.

Scalability and Customizability:

The system will be designed to be scalable, allowing for potential addition of new features or objects in the future. Customization options will be provided within the Salesforce environment.

Training and Support:

User documentation and training materials will be provided for administrators and end-users to effectively utilize the system.

Testing and Quality Assurance:

The system will undergo testing to ensure functionality, security, and performance meet the specified requirements.

Maintenance and Support:

The system will require ongoing maintenance and support to address any issues, implement updates, and provide assistance to users.

What is the issue?	<p>The issue is the need for a comprehensive and efficient system to plan, coordinate, and execute events, while effectively managing attendees, vendors, and speakers. This could be due to factors such as manual processes being time-consuming and error-prone, a desire for better organization and tracking of event-related information, or a need for improved communication and collaboration between event organizers, attendees, vendors, and speakers.</p> <p>The Event Management System will serve as a solution to this issue by leveraging the capabilities of the Salesforce platform to create a streamlined and integrated system for managing all aspects of events.</p>
When does the issue occur?	<p>Corporate Events: Such as conferences, seminars, workshops, and product launches organized by businesses for their employees, clients, or partners.</p> <p>Non-Profit and Charity Events: Including fundraisers, galas, and awareness campaigns organized by non-profit organizations.</p> <p>Educational Institutions: For organizing events like workshops, seminars, alumni gatherings, and orientation programs.</p> <p>Entertainment and Performing Arts: Including concerts, festivals, the after productions, and exhibitions.</p> <p>Weddings and Social Events: Personal events like weddings, parties, and reunions where event planning is involved.</p> <p>Trade Shows and Exhibitions: Industry-specific events where companies showcase their products or services.</p> <p>Government and Civic Events: Such as town hall meetings, public forums, and community events organized by government agencies.</p> <p>Healthcare and Medical Conferences: Events organized by healthcare organizations for medical professionals and stakeholders.</p> <p>Technology and IT Events: Including tech conferences, hackathons, and product launches.</p> <p>Sports Events: Organizing sports tournaments, matches, and competitions.</p>
Where is the issue occurring?	<p>Physical Locations: This includes venues where events are hosted, such as conference centers, hotels, convention halls, outdoor spaces, and other event-specific locations.</p> <p>Virtual or Online Environments: In the case of virtual or online events, the issue may occur in digital spaces like web conferencing platforms, virtual event platforms, and social media platforms.</p>

	<p>Organizational Settings: Within the offices or headquarters of organizations or companies that are planning and coordinating events for their employees, clients, or stakeholders.</p> <p>Community and Public Spaces: For events organized by non-profit organizations, government agencies, or community groups, the issue may occur in public spaces like parks, community centers, or town halls.</p> <p>Educational Institutions: Within the campuses of schools, colleges, and universities, where events like workshops, seminars, and orientations are organized.</p> <p>Online Platforms and Software: In the case of managing events through a digital platform, the issue may occur within the virtual environment of an event management software or platform.</p> <p>Remote Work Environments: In cases where event planning and coordination are conducted remotely, team members may be working from various locations and collaborating online.</p> <p>Healthcare Facilities: For medical conferences and events, the issue may occur within hospitals, clinics, or conference centers associated with the healthcare industry.</p>
<p>Why is it important that we fix the problem?</p>	<p>Efficiency and Productivity: Implementing an Event Management System streamlines the planning and execution process. It reduces manual tasks, minimizes errors, and allows for more efficient use of time and resources.</p> <p>Improved Communication and Collaboration: A centralized system enhances communication among stakeholders, including event organizers, attendees, vendors, and speakers. This leads to smoother coordination and fewer misunderstandings.</p> <p>Enhanced Attendee Experience: A well-managed event is more likely to provide a positive experience for attendees. This can lead to higher satisfaction rates, increased attendance in future events, and better reputation for the organizing entity.</p> <p>Data Management and Insights: The system allows for better tracking and management of data related to events, attendees, vendors, and speakers. This data can be leveraged for future planning, analysis, and decision-making.</p> <p>Compliance and Data Security: A well-designed system can help ensure compliance with data protection regulations (e.g., GDPR, HIPAA), safeguarding sensitive information and protecting the privacy of attendees.</p>

Cost Reduction:

Automation and streamlined processes can lead to cost savings in terms of reduced manual labor, minimized errors, and better resource allocation.

Scalability and Growth:

A robust Event Management System can be designed to accommodate a growing number of events, attendees, vendors, and speakers. It can adapt to changing needs and accommodate larger-scale operations.

Professionalism and Brand Image:

Efficient event management reflects positively on the professionalism and competence of the organizing entity. This can enhance the brand image and reputation of the organization.

Competitive Advantage:

Having an effective Event Management System can be a competitive advantage, especially in industries where events play a significant role in client relations, marketing, or community engagement.

Flexibility and Adaptability:

A well-designed system can adapt to different types of events and industries, providing flexibility in event planning and execution.

Feedback and Improvement:

The system can facilitate the collection of feedback from attendees, vendors, and speakers, allowing for continuous improvement in future events.

Objectives :

The objective of the Event Management System using Salesforce is to efficiently plan and execute events, manage attendees, vendors, and speakers. It centralizes event data, automates communication, and collects feedback. Reporting tracks key metrics, ensuring compliance and security. Integration streamlines tasks, and scalability and customization options are available. The system aims for cost-effective, well-organized events that deliver positive attendee experiences.

Key Features :

1. Efficient Event Planning : Streamlining the process from concept to execution.
2. Attendee Management : Handling registration, information, and communication for seamless attendee experiences.
3. Vendor Management : Selecting, booking, and coordinating vendors providing event services or products.
4. Speaker Management : Managing speaker selection, scheduling, and communication for well-prepared presentations.
5. Centralized Data : Storing all event-related information in one location for easy access and management.
6. Communication Tools : Automating notifications, reminders, and updates for effective stakeholder communication.
7. Feedback Collection : Gathering input from attendees, vendors, and speakers to evaluate event success and areas for improvement.

8. **Reporting and Analytics:** Tracking attendance rates, feedback scores, and vendor performance for insightful event analysis.
9. **Compliance and Security:** Ensuring adherence to data protection regulations and implementing security measures for sensitive information.
10. **Scalability and Customizability:** Allowing for future feature additions and customization to meet specific event management needs.

Scope :

This project involves building an Event Management System on Salesforce. It includes customizing four main objects, efficient event planning, attendee and vendor management, centralized data handling, automated communication, feedback collection, reporting, compliance, integration, user support, and cost-effectiveness measures. The goal is to deliver well-organized events for enhanced attendee satisfaction and success.

Constraints:

1. Time Constraints:

The project may have a fixed deadline for completion, requiring efficient planning, development, and testing within the allotted time frame.

2. Budget Constraints:

The project may have a limited budget, which could impact the resources available for development, customization, and implementation.

3. Compliance and Regulatory Constraints:

Adherence to specific industry regulations and data protection laws (e.g., GDPR, HIPAA) is crucial and may impose limitations on data handling and security measures.

4. Technology Stack and Platform:

The choice of Salesforce as the primary platform may limit certain technology options and development approaches.

5. Scalability Requirements:

The system may need to support a specific number of events, attendees, vendors, and speakers, potentially limiting its ability to handle a large volume of data or users.

Expected Deliverables:

Functional Event Management System:

A fully functional Event Management System deployed on the Salesforce platform.

Customized Salesforce Objects:

Customized objects for Event, Attendees, Vendor, and Speakers, tailored to meet specific project requirements.

User Documentation:

Comprehensive user documentation providing instructions for administrators and end-users on how to effectively utilize the system.

Training Materials:

Training materials, including guides, tutorials, or video demonstrations, to facilitate user onboarding and system understanding.

Source Code and Documentation:

Source code for the system, along with technical documentation to aid in maintenance, updates, and troubleshooting.

Benefits:

The Event Management System using Salesforce offers a range of benefits. It streamlines planning and coordination, enhances attendee experience, and fosters effective communication. The system centralizes event data, automates notifications, and provides valuable insights through reporting. This leads to cost savings, compliance with data protection, and scalability. Customization options cater to specific needs, and the system's professionalism enhances the brand image. Feedback drives continuous improvement, and vendor/speaker management is simplified. Integration with external platforms streamlines tasks. With an intuitive interface, it ensures easy use for administrators and end-users, ultimately resulting in successful events and satisfied attendees.