Project Design Phase
Problem – Solution Fit

Date	25 JUNE 2025
Team ID	LTVIP2025TMID31649
Project Name	Lease Management
Maximum Marks	

Problem Statement:

Organizations managing multiple property leases struggle with:

- Disjointed lease data across spreadsheets and legacy systems

- Inaccurate or delayed tracking of lease terms, renewals, and expirations

- Manual workflows leading to inefficiencies and errors

- Lack of integration with finance, legal, and sales teams

- Compliance risks due to missing documentation or regulatory deadlines

Target Users / Stakeholders:

- Lease Managers / Administrators

- Legal and Compliance Teams

- Sales/Account Executives

- Finance/Accounts Payable Teams

- IT/System Admins

- Tenants/Clients (via portals or reports)

User Needs:

- Centralized and searchable lease repository

- Automated alerts for key dates (e.g., renewals, rent increases)

- Integration with eSignature and document generation

- Reporting dashboards (occupancy, revenue, lease status)
- Mobile-friendly access to lease data

- Secure role-based access to lease records

- Compliance and audit trails

Proposed Solution in Salesforce:

1. Custom Salesforce Objects for Leases, Properties, Tenants, etc. 2.

Automated Workflows for renewals, terminations, and notifications 3.

Document Management Integration with SharePoint or Salesforce Files 4.

Dashboards and Reports using Salesforce CRM Analytics

5. Role-Based Access Control through Salesforce Profiles and Permission Sets

6. Tenant Portal via Salesforce Experience Cloud for real-time updates 7.

Integration with CPQ (if applicable) for lease quote generation

Current State vs. Future State:

Feature Current (Manual/Legacy) Future (Salesforce-Based) Lease Storage

Excel / File Drives Centralized Salesforce Object Notifications Manual Emails

Automated via Flows & Alerts

Reporting Ad-hoc, error-prone Real-time, customizable Dashboards

Collaboration Disconnected silos Integrated cross-functional access Compliance

Tracking Manual, reactive Proactive with audit-ready trails

Tools/Technologies That Can Be Used

- **Salesforce/ServiceNow** – For lease workflow automation and case tracking

- **DocuSign/Adobe Sign** – For digital contract approvals

- **Power BI/Tableau** – For analytics and lease trend dashboards

- **Cloud Storage (AWS/GCP/Azure)** – For centralized document access

- **RPA Tools** – To auto-extract data from legacy systems or PDFs

Outcome:

INDICATOR	Before (Problem)	After (Solution)
Lease data visibility	Fragmented, inaccessible	Centralized, searchable, and secure
Compliance	Manual and error-prone	Automated and audit-ready
Renewal tracking	Often missed deadlines	Proactive alerts and escalations
Interdepartmental coordination	Delayed and siloed	Seamless and collaborative
Financial accuracy	High risk of overpayment or non-compliance	Precise calculations and reconciliations