**Phase 1: Problem Understanding & Industry Analysis**

**Project: *WhatNext Vision Motors* – *Shaping the Future of Mobility with Innovation and Excellence***

**1. Requirement Gathering (Admin + Developer)**

* **Business Needs:**
  + Centralized customer management (leads, test drives, vehicle purchases).
  + Tracking after-sales services, warranty, and maintenance.
  + Dealer network management (sales partners, service centers).
  + Customer feedback & complaint tracking.
* **Admin Role:**
  + Conduct discovery sessions with sales, service, and dealer teams.
  + Document standard & custom objects needed (Leads, Opportunities, Vehicles, Service Requests).
* **Developer Role:**
  + Identify technical gaps requiring Apex, Lightning Components, or integrations (e.g., IoT data from vehicles, payment gateways).

**2. Stakeholder Analysis**

* **Internal Stakeholders:**
  + **Sales Team** – want efficient lead management & conversion tracking.
  + **Service Team** – need vehicle service history & predictive maintenance alerts.
  + **Management** – need dashboards for sales pipeline, service performance, and dealer productivity.
* **External Stakeholders:**
  + **Customers** – expect seamless purchase experience, personalized offers, and proactive service reminders.
  + **Dealers & Partners** – need transparent inventory, pricing, and order fulfillment.
* **Admin Role:** Define roles & profiles in Salesforce, ensuring correct data visibility.
* **Developer Role:** Automate workflows for different stakeholders (e.g., auto-notifications for service due dates).

**3. Business Process Mapping**

* **Sales Process Flow:**  
  Lead ➝ Test Drive ➝ Opportunity ➝ Quotation ➝ Order ➝ Vehicle Delivery.
* **Service Process Flow:**  
  Service Request ➝ Technician Assignment ➝ Resolution ➝ Customer Feedback.
* **Dealer Process Flow:**  
  Inventory Request ➝ Approval ➝ Vehicle Allocation ➝ Reporting.
* **Admin Role:**
  + Configure objects, fields, and flows matching above processes.
* **Developer Role:**
  + Create custom Lightning Pages, triggers, and possibly APIs for integration with vehicle tracking systems (IoT).

**4. Industry-specific Use Case Analysis**

* **Automotive Sector Challenges:**
  + Need predictive maintenance alerts.
  + Customer loyalty programs & referral tracking.
  + EV (Electric Vehicle) adoption support (charging station locator).
* **Salesforce Solutions:**
  + **Service Cloud** for proactive service & case management.
  + **Marketing Cloud** for personalized campaigns & EV promotions.
  + **Experience Cloud** for customer & dealer portals.
* **Admin + Developer Collaboration:**
  + Admin configures Service Cloud case categories, queues, and SLAs.
  + Developer builds custom EV tracking apps or charging station integration.

**5. AppExchange Exploration**

* **Apps useful for WhatNext Vision Motors:**
  + **Geopointe / MapAnything** – vehicle tracking & dealer location mapping.
  + **Conga Composer** – automated quotes, invoices, and service reports.
  + **Salesforce Field Service** – manage technician scheduling & onsite repairs.
  + **Survey Tools** – gather post-service feedback from customers.
* **Admin Role:** Test and evaluate pre-built AppExchange solutions.
* **Developer Role:** Extend/customize apps if out-of-the-box features don’t meet requirements.

**Outcome of Phase 1:**  
A clear understanding of WhatNext Vision Motors’ business needs, mapped processes, stakeholder roles, and possible Salesforce solutions (standard + custom + AppExchange).