Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Objective: Identify the needs and expectations of all stakeholders involved in sustainability projects and carbon credit management.

Key Requirements:

- Centralized tracking of sustainability projects (tree plantations, solar, recycling projects).
- Management of carbon credit issuance, trading, and retirement.
- Compliance tracking with international standards and certifications (ISO, CDM, Verra).
- Automated dashboards showing environmental impact (emissions reduced, renewable energy generated, trees planted).
- Notifications for expiring credits, project updates, and compliance deadlines.
- Integration with NGO databases, carbon pricing APIs, and governmental audit systems.
- Role-based access for corporate sustainability teams, NGOs, investors, and auditors.

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2. Stakeholder Analysis

Stakeholder	Role	Needs	Pain Points
Corporate Sustainability Teams	Manage Net Zero initiatives	Real-time tracking of projects & credits	Difficulty tracking multiple partners & projects
NGOs	Implement carbon offset projects	Visibility of project status & impact	Manual reporting and verification delays
Carbon Credit Buyers & Investors	Purchase credits	Transparent credit trading & impact reporting	Lack of transparency in credit lifecycle
Government Auditors	Ensure compliance	Access to verified data & reports	Difficulty auditing multiple projects across platforms
Sustainability Consultants & Vendors	Provide services & consultation	Efficient communication & project updates	Manual coordination with multiple stakeholders

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3. Business Process Mapping

High-Level Process Flow:

1. **Lead Capture & Qualification**
   - Sustainability projects sourced from NGOs, corporates, or partners.
   - Leads scored based on commitment to Net Zero goals (Green Interest Score).
2. **Project Management**
   - Projects tracked from proposal → verification → approval → active → completion.
   - Partners assigned and progress monitored.
3. **Carbon Credit Lifecycle**
   - Credits issued based on verified projects.
   - Trading between buyers and sellers with audit trail.
   - Expired credits automatically blocked.
4. **Compliance & Reporting**
   - Partner certifications verified and updated.
   - Automated generation of sustainability and compliance reports.
5. **Engagement & Notifications**
   - Buyers notified of new projects or expiring credits.
   - Personalized dashboards showing contributions to Net Zero goals.

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4. Industry-Specific Use Case Analysis

Key Use Cases:

- **Lead Management:** Capture and assign leads for sustainability projects.
- **Carbon Credit Trading:** Issue, sell, and retire carbon credits with validation rules.
- **Partner Compliance:** Maintain partner certifications and automate compliance checks.
- **Impact Reporting:** Dashboard to track emissions reduced, renewable energy produced, and trees planted.
- **Automated Notifications:** SMS/email alerts for project updates, credit expiry, and compliance renewals.

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5. AppExchange Exploration

Objective: Explore Salesforce AppExchange to identify tools or apps that can complement the GreenFuture CRM.

Findings:

- **Carbon Credits Management Apps:** Limited availability; most require custom Salesforce implementation.
- **Project Management Apps:** Tools like **TaskRay** or **Mission Control** could help track sustainability projects.

- **Sustainability Reporting:** Few reporting apps exist; dashboards need customization for environmental metrics.
- **Integration Tools:** MuleSoft connectors or Salesforce Connect could help integrate with NGO databases and carbon pricing APIs.