Venue Connect CRM

1. Requirement Gathering

- Allow customers or agents to register bookings for venues (halls, conference rooms, outdoor spaces, etc.).

- Capture booking details: venue type, date, time, duration, capacity, and customer details.

- Prevent overlapping bookings for the same venue and time slot.

- Handle booking approvals for high-value events (e.g., cost > ₹1,00,000).

- Track booking status: Requested → Pending Approval → Approved → Confirmed → Completed / Cancelled.

- Auto-calculate total booking cost based on rate per hour and duration.

- Send notifications to customers and staff via email or in-app alerts.

- Generate dashboards for management: total bookings, revenue by venue, top venues, and booking trends.

2. Stakeholder Analysis

Stakeholder	Role	Expectations
Customers (Individuals / Companies)	Book venues for events	Easy booking process, confirmation notifications, transparent pricing
Booking Agents	Create and manage booking records	Quick venue search, prevent double bookings, automate cost calculation
Venue Managers	Approve and oversee bookings	Approve high-value bookings, monitor daily schedule, track utilization
Support Staff	Handle cancellations or issues	Access booking details, update status, manage customer queries
System Admin / Managers	Oversee operations and reporting	Dashboards for bookings, revenue, top venues, and utilization reports

3. Business Process Mapping

Current Process (Manual / Inefficient)

- Customers contact via phone/email for availability.

- Agents manually check calendars, risking double-bookings.

- Approvals are delayed as managers review via emails.

- No central system for reports or customer communication.

Proposed Process (With Salesforce CRM)

1. Customer/Agent registers booking in CRM.

2. System checks availability and prevents overlaps.

3. If high-value, booking routed to Manager for approval.

4. Notifications sent to customer and staff for confirmation.

5. Booking status updated: Requested → Approved/Confirmed.

6. Dashboards display total bookings, revenue, and top venues.

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4. Industry-Specific Use Case Analysis

- **Customer Booking:** Individuals or companies reserve venues by entering event details.

- **Availability Check:** CRM prevents overlapping bookings by validating date/time.

- **Booking Tracking:** Status updated in real-time (Requested → Approved → Confirmed → Completed).

- **Revenue & Utilization Insights:** Dashboards show revenue trends, top venues, and booking frequency.

- **Automated Communication:** Email/SMS notifications sent for confirmations, approvals, and reminders.

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5. AppExchange Exploration

- **SMS Magic / Twilio for Salesforce:** Send booking confirmations and reminders.

- **MapAnything / Geopointe:** Locate venues and optimize directions for event staff.

- **Conga Composer / DocuSign:** Generate invoices or agreements for corporate bookings.