

# Project Planning Phase

Date	26 JUNE 2025
Team ID	LTVIP2025TMID30578
Project Name	Lease Management
Maximum Marks	

The Project Planning Phase forms the foundation for successfully executing the Lease Management system. This phase involves clearly defining the project scope, establishing roles, creating work breakdowns, sprint planning, risk assessments, and preparing all necessary resources.

## 1. Project Objectives

- Automate the end-to-end lease lifecycle – from lease creation to renewal, tracking, and termination.
- Integrate payment tracking, alert notifications, and compliance validation.
- Provide visibility to users via dashboards, reports, and automated flows using Salesforce.

## 2. Scope of Work

Component	Details
Core Modules	Lease Creation, Lease Renewal, Payment Tracking, Alerts/Reminders, Dashboard
Integrations	Salesforce automation (Flows, Validation Rules, Scheduled Jobs)
Compliance	Validation of lease periods, date dependencies, and payment compliance

### 3. Project Goals

- Automate lease operations (creation, renewal, termination).
- Ensure accurate payment scheduling and reminders.
- Improve visibility via real-time dashboards and reports.
- Integrate compliance checks through validations and approval flows.
- Create a scalable and reusable lease framework using Salesforce.

### 4. Scope Definition

The scope outlines the exact boundaries of what the Lease Management system will cover:

In-Scope Items	Out-of-Scope Items
Lease agreement creation, update, renewal	Manual document processing
Payment reminders and automation	External payment gateway integrations
Validation rules for date consistency	Legal contract drafting
Email alerts and notifications	Property appraisal or valuation tools
Lease dashboard and analytics	Third-party tenant screening APIs

### 5. Agile Sprint Planning (Backlog Sample)

Sprint	Epic	User	Task	Story	Priorit
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		Story		Points	y
Sprint-1	Lease Creation	USN-1	User can create new lease entries	3	High
Sprint-1	Validation	USN-2	Validate start and end dates	2	High logic
Sprint-2	Payment	USN-3	Payment update flow	3	Medium Module automation
Sprint-3	Notifications	USN-4	Email alerts before due dates	2	Medium
Sprint-3	Reporting	USN-5	Dashboard for active leases	2	High

## 6. Risks & Mitigation Strategies

Identified Risk	Mitigation Plan
Incorrect lease data during import	Perform test imports using sample sets
Users skip lease renewal	Implement automated alerts + escalation updates
Low adoption due to complex UI	Provide training, keep UI intuitive
Unclear lease termination rules	Collaborate with legal for flow validation

## 7. Key Deliverables in Planning Phase

- ✓ Requirement Specification Document (BRD)
- ✓ Technical Design Document (TDD)
- ✓ Sprint-wise User Story Backlog
- ✓ Risk Assessment and Mitigation Plan
- ✓ Resource and Timeline Allocation Sheet
- ✓ Acceptance Criteria for each feature
- ✓ Training & Go-Live Readiness Plan