Phase 1: Problem Understanding & Industry Analysis

1. Problem Statement

An organization is struggling with fragmented customer relationship management across sales, service, and partner interactions. Data is scattered in spreadsheets and disconnected tools, leading to delays in customer responses, poor sales conversion, and lack of visibility into pipeline performance. Customers have no proper self-service options, and partners find it difficult to collaborate. The company requires an end-to-end Salesforce CRM implementation with **Admin configurations, Development customization, and Community portals** to unify customer data, automate workflows, and enhance engagement.

---

2. Requirement Gathering

- Sales and service teams manage leads and cases in separate tools → Results in duplicated and inconsistent data.

- Manual workflows cause **missed follow-ups** and delayed customer responses.

- No centralized dashboard for pipeline tracking, KPIs, or customer history.

- Partners and customers lack a **self-service portal** → Overloaded support teams.

Core Requirement:
A Salesforce-based CRM with **Admin features** for security & automation, **Development features** for custom apps/integration, and a **Community portal** for customer/partner engagement.

---

3. Stakeholder Analysis

- **Business Owners/Management** → Need 360° visibility of sales, service, and customer engagement metrics.
- **Sales & Service Teams** → Require centralized lead/case tracking, automated workflows, and customized dashboards.
- **Customers** → Expect fast responses, self-service portals, and smooth interaction experiences.
- **Partners/Dealers** → Need access to leads, opportunities, and support cases through a portal for better collaboration.

---

4. Business Process Mapping

- **Lead & Case Capture** → Website forms, phone calls, emails, and social media inquiries.
- **Lead Assignment & Case Routing** → Rules to auto-distribute leads/cases to the right sales/service team.
- **Follow-Ups & Automation** → Reminders via email, SMS, or Whats-app for leads, renewals, and case updates.
- **Opportunity & Enrollment (if applicable)** → Proposal generation, approvals, and deal closure.
- **Community Engagement** → Customer/Partner portal for inquiries, self-service, and collaboration.
- **Performance Tracking** → Dashboards for pipeline visibility, conversion metrics, and team productivity.

---

5. Industry-specific Use Case Analysis

- **Retail & E-commerce** → Customer inquiries, order tracking, service cases, and loyalty programs.

- **Financial Services** → Lead nurturing, loan pipeline management, and customer support automation.
- **Healthcare** → Patient inquiries, appointment scheduling, and follow-up reminders.
- **Education & Training** → Student lead tracking, counseling follow-ups, and enrollment workflows.
- **Technology & Startups** → Partner collaboration, customer success management, and community engagement.

---

6. AppExchange Exploration

- Existing CRMs on AppExchange offer modules for sales or service but lack seamless **Admin + Development + Community integration**.
- Many industry CRMs are either **too generic or costly**, not optimized for mid-sized organizations.
- **Gap Identified:** Opportunity to implement a **customizable, saleable, and affordable Salesforce CRM** with unified Admin setup, custom Development (Apex, LWC, API interactions), and a branded Community portal tailored for the organization's industry needs.