Phase 1: Problem Understanding & Industry Analysis (Lead Tracking System)

Requirement Gathering

The project addresses the challenge of manually handling sales leads and potential customer inquiries. Businesses often struggle with missed opportunities, lack of timely follow-ups, and poor visibility into the sales pipeline. Requirements include automated lead capture, assignment to sales representatives, lead status tracking, follow-up reminders, and reporting dashboards for conversion insights.

Stakeholder Analysis

Primary stakeholders are: - Leads/Prospects: potential customers showing interest in products or services. - Sales Representatives: who follow up with assigned leads. - Sales Managers: who monitor lead conversion and team performance. - Business Owners: who require insights into revenue generation and growth.

Business Process Mapping

Current Process: Leads collected from calls/emails/web forms → Entered manually into spreadsheets → Follow-ups often delayed or missed → Low conversion rate → Limited reporting on performance. Proposed Process with Salesforce: Lead captured automatically via forms/social campaigns → Stored as Lead record in Salesforce → Assigned to sales rep based on rules → Follow-ups tracked till qualification/conversion → Automated reminders and notifications → Reports & dashboards for sales performance insights.

Industry-specific Use Case Analysis

This project fits the Sales and Marketing domain, applicable to industries such as retail, real estate, banking, insurance, and IT services. Automating lead management ensures better customer engagement, higher conversion rates, and efficient tracking of sales growth.

AppExchange Exploration

Potential AppExchange tools include: - Marketing Automation Tools (e.g., Pardot, Mailchimp integrations). - Lead Enrichment Apps (e.g., LinkedIn Sales Navigator, ZoomInfo). - Communication Tools (e.g., SMS/Email notification apps). For this capstone,

we will primarily use Salesforce core features (Leads, Campaigns, Reports, and Dashboards) with optional lightweight AppExchange integrations.