Lead Management & Task Tracking System

Phase 10: Final Presentation & Demo Day

1. Introduction

Phase 10 focuses on preparing, presenting, and showcasing the project to stakeholders. This phase ensures that your project is **well-documented, demonstrated effectively, and visible professionally**.

Objectives:

- Present project goals, features, and business value.
- Demonstrate the functionality of the Lead Management & Task Tracking System.
- Collect feedback for improvement.
- Document the project for future reference and portfolio showcase.

2. Pitch Presentation

Purpose: Introduce your project, its objectives, and business impact.

Setup Steps:

1. Use **PowerPoint, Google Slides, or Canva**.
2. Include slides covering:
    - Project Title & Team Members
    - Problem Statement & Industry Context
    - Key Features & Functionalities
    - Salesforce Architecture (Objects, Flows, Apex, LWC)
    - Integrations and Automation
    - Reporting & Dashboards
    - Security & Data Management
3. Keep slides **concise and visually appealing**.
4. Practice **3–5 minute pitch** per slide.

Deliverable: Final pitch presentation ready for Demo Day.

3. Demo Walkthrough

Purpose: Show real-time functionality to stakeholders.

Setup Steps:

1. Prepare **Salesforce Sandbox or Dev Org** with sample data.
2. Demonstrate key features:
    - Creating and managing leads
    - Assigning tasks and tracking progress
    - Process automation (Flows, Approval Processes)
    - LWC components (Lead Dashboard, Task List)
    - Integration examples (HTTP callouts, Platform Events)
    - Reports and dashboards
3. Highlight **user experience and workflow efficiency**.
4. Record a **demo video** as backup for remote presentations.

Deliverable: Live demo or recorded walkthrough showing all key functionalities.

4. Feedback Collection

Purpose: Gather suggestions from stakeholders to improve the system.

Setup Steps:

1. Create **feedback forms** using Google Forms, Microsoft Forms, or Salesforce Surveys.
2. Ask questions like:
    - Are the features intuitive and useful?
    - Are the reports/dashboards insightful?
    - Any missing functionalities?
    - Overall user experience feedback
3. Compile and analyze the feedback for improvements.

Deliverable: Feedback report from Demo Day stakeholders.

5. Handoff Documentation

Purpose: Provide detailed documentation for future maintenance or upgrades.

Contents:

1. **Project Overview:** Objectives, scope, and business impact.
2. **Configuration Documentation:** Objects, fields, Flows, Apex, LWC components.
3. **Integration Details:** Named Credentials, API endpoints, Platform Events, CDC.
4. **Security & Data Management:** Sharing rules, FLS, duplicate rules, backup strategies.
5. **Deployment Instructions:** Change Sets, managed/unmanaged packages, org setup.
6. **Reports & Dashboards:** Sample reports, dashboard snapshots, report types.

Deliverable: Comprehensive project handoff document.

6. LinkedIn / Portfolio Project Showcase

Purpose: Highlight the project publicly for professional visibility.

Setup Steps:

1. Create a **LinkedIn post** or **portfolio webpage** summarizing:
    - Project name and objective
    - Key features and tech stack (Salesforce, Apex, LWC, Flow, Integrations)
    - Screenshots of dashboards and LWC components
    - Optional demo video
2. Tag relevant technologies and your institution.
3. Add it to **resume/portfolio** under Salesforce projects.

Deliverable: Public-facing portfolio entry and LinkedIn post showcasing the project.