

Phase I

AURA EVENTS & SPONSOR:

College Events & Sponsor Management

The **Event Management Cell of a college** currently tracks:

- Event details (venue, date, budgets)
- Vendor contracts (sound systems, food stalls, stage setup)
- Sponsor commitments (financial sponsors, brand collaborations)

These are tracked **manually** in spreadsheets, WhatsApp groups, and emails

Proposed solution:

✓ **Centralized System in Salesforce**

All event details, vendors, and sponsorship data stored in one place.

✓ **Sponsorship Pipeline**

Sponsors tracked from **Prospect** → **Negotiation** → **Closed**, ensuring no missed follow-ups.

✓ **Automation**

- Automated reminders for vendor payments, sponsorship deadlines, and task approvals.
- Notification workflows for event changes.

✓ **Real-Time Analytics**

- ROI calculation for each event/fest.
- Dashboards showing sponsor contributions, expenses, and engagement.
- Marketing campaign analysis for student participation.

✓ **Improved Collaboration**

Event coordinators, sponsors, and marketing heads share the same updated information.

Requirement Gathering:

This is the step where the team collects detailed information from all stakeholders. The goal is to identify all the features and functionalities needed for the Salesforce application.

- **Process:** Interviews and workshops are conducted with key users, including event coordinators, marketing teams, sales/sponsorship teams, and finance personnel.
- **Key Questions:**
 - What specific data points are currently tracked in spreadsheets?
 - What are the biggest pain points with the current manual system? (e.g., miscommunication, missed deadlines, inability to calculate ROI).
 - What reports and dashboards are needed to get a clear view of events and sponsorships?
 - What automation would save the most time? (e.g., reminders for payments, notification for event changes).

Outcome: A comprehensive document outlining the functional and non-functional requirements for the AURA EVENTS & SPONSOR Salesforce application.

Stakeholder Analysis

This step identifies all individuals and groups affected by the project and determines their roles, interests, and influence. Understanding each stakeholder's perspective is vital for gaining project buy-in and ensuring the solution meets everyone's needs.

- **Stakeholders:**
 - **Event Coordinators:** Need a centralized system to track event details, budgets, and vendor contracts.
 - **Graphics Team:** Need a user experience champion, for the creation of reports and visually consistent work.

- **Sponsorship/Sales Team:** Need a structured pipeline to manage leads, track follow-ups, and secure commitments.
- **Marketing Team:** Need to link promotional campaigns to events and measure their effectiveness.
- **College Administration/Finance:** Need clear ROI reports and dashboards to justify budget and analyze event profitability.
- **IT Department:** Concerned with security, scalability, and integration with existing systems.
- **Outcome:** A stakeholder map that clarifies roles, expectations, and communication strategies for each group.

Business Process Mapping

This activity involves visually documenting the current manual processes and designing the future, optimized processes within Salesforce. This helps identify inefficiencies and opportunities for automation.

- **Current Process:** A diagram would show the manual flow: event details in one spreadsheet, vendor contracts in email, sponsor contacts in another spreadsheet, and communications happening over WhatsApp.
- **Future Process:** A new diagram would show the streamlined, automated flow within Salesforce: a single Event record is created, related Vendor records are added, and a Sponsorship Pipeline tracks deals from prospect to closure, all in one system.

Outcome: A clear "before and after" picture of the business process, highlighting how Salesforce will centralize information and improve efficiency.

Industry-Specific Use Case Analysis:

❖ Use Case 1: Event Creation & Management

Goal: To create a new event record and centralize all associated details, budgets, and requirements.

Problem Solved: Disorganized planning and fragmented information tracking.

❖ **Use Case 2: Vendor Contract & Payment Tracking**

Goal: To track vendor contracts, deadlines, and payments in an organized manner.

Problem Solved: Manual tracking in spreadsheets and missed deadlines for payments.

❖ **Use Case 3: Sponsor Prospecting & Deal Closure**

Goal: To manage the entire sponsorship lifecycle from initial contact to a signed deal.

Problem Solved: Lack of a structured pipeline, missed follow-ups, and difficulty in securing sponsorships.

❖ **Use Case 4: Real-Time ROI Analysis**

Goal: To view the financial performance of an event in real-time.

Problem Solved: Inability to calculate ROI (Revenue vs. Expenses) and poor reporting.

❖ **Use Case 5: Marketing Campaign Performance Measurement**

Goal: To link marketing activities to a specific event and measure their effectiveness.

Problem Solved: Inability to analyze which marketing efforts led to student participation and engagement.

AppExchange Exploration:

Salesforce's AppExchange is a marketplace for pre-built applications that can extend the platform's functionality. This step involves researching existing apps to see if any can be leveraged instead of building everything from scratch.

- **Exploration Focus:**

- **Event Management Apps:** Are there apps that offer pre-built event record objects, vendor management features, or a check-in system?

- **Sponsorship/Fundraising Apps:** Are there apps with robust lead and opportunity management tailored for sponsorship or fundraising?
- **Automation Apps:** Are there tools for sending automated reminders or generating documents? (e.g., vendor contracts)

Outcome: A list of potential AppExchange solutions that could accelerate development and provide pre-packaged functionality, saving time and resources. This helps inform a build-or-buy decision.