

Ideation Phase

Define the Problem Statement

Date	2 November 2025
Team ID	NM2025TMID08441
Project Name	Calculating Family Expenses using ServiceNow
Maximum Marks	2

Customer Problem Statement Template:

Families face challenges in efficiently tracking and managing their daily expenses. Without proper categorization and monitoring, it becomes difficult to maintain a budget, leading to overspending and financial stress. Lack of visibility into spending habits also makes it hard to plan for future needs or identify unnecessary expenditures.

They need an intelligent system that helps record, categorize, and analyze expenses easily. This ensures better financial control, informed decision-making, and improved savings. Automated alerts, visual dashboards, and budget reports would enhance the overall experience and make expense management more transparent and convenient.

Problem & Solution Table

Problem	Description	Solution
Data integrity	Deleting users who are still linked to incidents compromises data integrity and leads to incomplete records	Implement a requirement to check for incidence deletion of assigned if deleted users can be deleted.
User Confusion	Active incidents associated with deleted users create confusion and disrupt team assignments	Show a warning or confirmation prompt when attempting to delete users linked
Compliance Issues	incident records without clear ownership	Automatic reassignment of active incidents to another user or resolving them before deleting
Audit Challenges	Without oversight: audits lack accurate insights into team activities and user deletion	Ensure customizable workflows that reassign incidents if a user assigned to them is deleted

Reference: <https://miro.com/templates/customer-problem-statement/>

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Example:

I am (Customer)	I'm trying to	But	Because	Which makes me feel
PS-1 A Family Member	Track monthly expenses	I often forget to record transactions	there's no automated or organized system for it	Frustrated and unaware of spending patterns

PS-2 A Parent	Manage household budget	expenses are scattered and	there's no consolidated summary of	Stressed and unable to control
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Problem Statement PS-1:

As a family member, I am trying to track my monthly expenses accurately, but I often forget to record individual transactions or categorize them properly. Because there is no automated system or reminder in place, I lose track of where money is spent. This makes me feel frustrated and financially disorganized. I need a system that automatically records, categorizes, and visualizes my expenses for better understanding and control.

Problem Statement PS-2:

As a parent, I want to manage and monitor the entire household budget, but it's difficult because expenses are recorded in different places and lack categorization. This causes confusion and poor financial planning. I need a centralized solution that provides real-time summaries, alerts for overspending, and visual insights to help control expenses and improve budgeting efficiency.