

Phase 1: Problem Understanding & Industry Analysis

a. Requirement Gathering

We gathered requirements from the NGO's day-to-day operations:

- Track **donations** (money, clothes, food, groceries).
- Manage **volunteers** (registration, skills, availability, feedback).
- Organize and monitor **events**.
- Send **automatic thank-you emails, reminders, and notifications**.
- Generate **reports and dashboards** for transparency and analysis.

b. Stakeholder Analysis

- **NGO Admin** → Full access, manages everything.
- **Donor Manager** → Focused on donor and donation-related activities.
- **Volunteer Coordinator** → Handles volunteer registrations, participation, and feedback.

c. Business Process Mapping

- **Donation Process** → Donor submits donation → System validates data → Auto send acknowledgment email → Update records → Generate IT certificate if donation is money.
- **Volunteer Process** → Volunteer registers → Assigned to events → Provides feedback → Auto send thank-you/acknowledgment.
- **Event Process** → NGO Admin creates event → Volunteers join → Donors can link donations → Reports/Dashboard show outcomes.

d. Industry-specific Use Case Analysis

NGOs often face challenges in:

- Managing **donor engagement**.
- Sending timely **communications** (thank you, reminders).
- Tracking **volunteer participation**.
- Maintaining **transparency** in donation usage.

This project solves these challenges by building a **centralized Salesforce app** for NGOs.

e. AppExchange Exploration

Before starting, we reviewed AppExchange for NGO apps like **Nonprofit Success Pack (NPSP)**.

- Found that NPSP provides standard features but may be too broad.
- Decided to create a **custom NGO Management solution** tailored to donation, volunteer, and event workflows.