

## Phase 2: Requirement Phase

### [Customer Journey Mapping]

In this phase, the project focuses on gaining a deep understanding of the customer's journey in the leasing lifecycle, using Salesforce as the foundational platform for digital transformation. Requirement analysis is done through mapping key customer interactions, identifying pain points, and collecting stakeholder expectations to align business processes with technical capabilities.

#### **Objective**

- To define clear functional and non-functional requirements based on the customer's journey.
- To create an end-to-end customer journey map for lease management.
- To bridge the gap between customer expectations and current leasing workflows.

#### **Customer Journey Mapping in Lease Management**

##### ***Awareness & Inquiry Stage***

Touchpoints: Website, real estate agent, mobile app, referrals.

Needs: Property info, lease terms, pricing, eligibility.

Salesforce Use: Web-to-lead forms, lead assignment rules.

##### ***Application & Documentation Stage***

Touchpoints: Online portal, branches, customer care.

Needs: Easy document upload, eligibility checks.

Salesforce Use: Custom objects, document handling via Files or DocuSign.

##### ***Verification & Approval Stage***

Touchpoints: Emails, calls.

Needs: Fast verification, clear updates.

Salesforce Use: Approval flows, task automation.

##### ***Lease Agreement & Signing***

Touchpoints: Digital signing platforms.

Needs: Secure, legally compliant process.

Salesforce Use: Auto-generation, eSignature integration.

### **Onboarding & Move-in**

Touchpoints: Welcome messages, site visits.

Needs: Seamless move-in, clear instructions.

Salesforce Use: Service case creation, onboarding flows.

### **Ongoing Lease Management**

Touchpoints: Tenant portals, apps, support teams.

Needs: Rent payments, issue reporting.

Salesforce Use: Experience Cloud, Service Cloud, payment integration.

### **Renewal or Termination**

Touchpoints: Emails, apps, agents.

Needs: Transparent process, reminders.

Salesforce Use: Notifications, renewal workflows, analytics.

### **Requirement Gathering Activities**

Stakeholders: Leasing, finance, legal, IT, tenants.

Methods: Interviews, workshops, observation.

Deliverables:

- Functional Requirements: Tracking, automation, reporting.
- Non-Functional: Security, UX, scalability.
- Compliance: GDPR, lease law, digital signature legality.

### **Pain Points Identified**

- Delays from manual processes.
- Lack of visibility into lease lifecycle.
- Inconsistent communication.
- Limited analytical insights.

### **Salesforce Capabilities Aligned**

| Requirement         | Salesforce Feature            |
|---------------------|-------------------------------|
| Lead capture        | Web-to-Lead, OmniStudio       |
| Workflow automation | Flow Builder, Process Builder |

|                                  |                                 |
|----------------------------------|---------------------------------|
| <b>Document handling</b>         | Salesforce Files, DocuSign      |
| <b>Customer communication</b>    | Service Cloud, Experience Cloud |
| <b>Analytics &amp; reporting</b> | Dashboards, Einstein Analytics  |

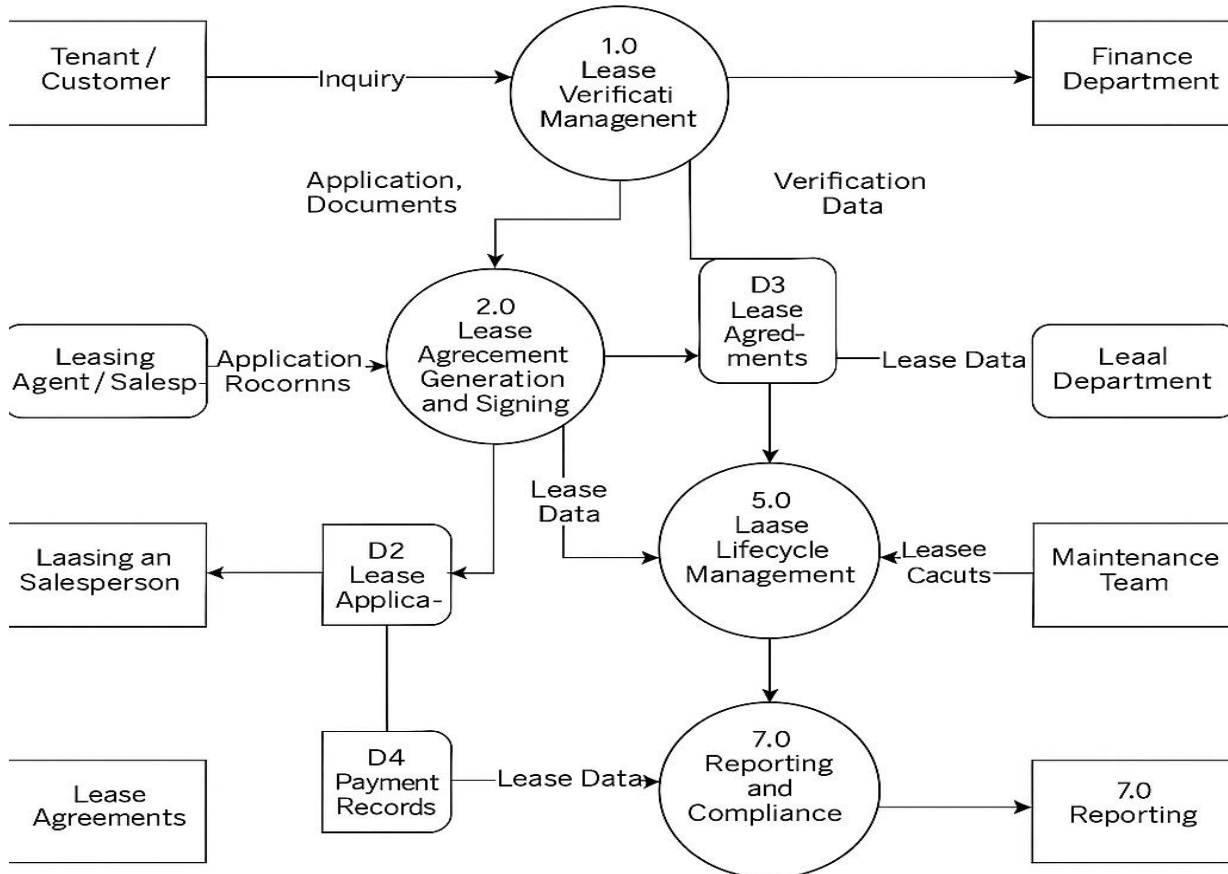
### Conclusion

This requirement phase builds the foundation for solution design by centering the leasing process around real customer experiences. The insights from this journey map directly shape the architecture and priorities for the next phases in the Salesforce lease management project.

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### [Data Flow Diagram (DFD)]

The diagram below represents a Level 1 Data Flow Diagram for a Lease Management Project in Salesforce. It includes core processes, data stores, external entities, and the flow of data between them throughout the lease lifecycle.



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### [Solution Requirements]

To effectively develop and implement the Lease Management System within Salesforce, a comprehensive solution architecture and supporting technology stack must be identified. This ensures that the platform is scalable, secure, and user-friendly, meeting both business and tenant needs throughout the lease lifecycle.

#### Functional Requirements

- Capture and manage lease inquiries and leads through Salesforce CRM.
- Automated lease application and approval workflows.
- Digital document generation and e-signature capabilities.
- Centralized dashboard for managing active leases and tenant data.
- Notifications for renewals, payments, and lease expirations.
- Integration with payment gateways for online rent collection.
- Case management for tenant support and maintenance requests.

#### Non-Functional Requirements

- High availability and scalability for enterprise use.
- Strong data security, access control, and compliance (e.g., GDPR).
- Fast system performance and responsive UI.
- Customizability to adapt to changing lease workflows.

#### Extended Solution Requirements and Architecture

##### Extended Functional Requirements

- Multi-role access for leasing agents, finance, legal, and maintenance users.
- Audit trail for all key lease-related activities for compliance.
- Centralized calendar for lease expiry, renewal dates, and inspections.
- Integration with email/SMS services for automated communication.
- Document versioning and archival capabilities.
- Support for sub-leases, amendments, and co-tenancy cases.

### Extended Non-Functional Requirements

- Mobile-friendly design for tenant and agent access via mobile devices.
- Role-based dashboards tailored to user needs (e.g., leasing, finance).
- Seamless integration with external property management software (if required).
- Performance tuning for large datasets and multi-property handling.
- Continuous monitoring and logging using Salesforce Event Monitoring or integrated tools.

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### [ Technology Stack]

| Component             | Technology/Tool   |
|-----------------------|---|
| Platform              | Salesforce (Sales Cloud, Service Cloud, Experience Cloud) |
| Automation            | Flow Builder, Apex Triggers, Process Builder              |
| Data Management       | Custom Objects, Salesforce Files, Shield Encryption       |
| Digital Signatures    | DocuSign / Adobe Sign Integration                         |
| Reporting & Analytics | Salesforce Reports, Dashboards, Einstein Analytics        |
| Integration           | Salesforce APIs, Mulesoft (if needed)                     |
| Frontend/UX           | Lightning Web Components (LWC), Experience Cloud Portals  |
| Deployment & DevOps   | Salesforce DX, GitHub, CI/CD Tools                        |

### Extended Technology Stack Additions

| Component            | Technology/Tool   |
|----------------------|---|
| Mobile Access        | Salesforce Mobile App, Responsive Lightning Components          |
| Communication        | Salesforce Digital Engagement, Twilio Integration               |
| Compliance & Logging | Salesforce Shield, Event Monitoring                             |
| External Integration | MuleSoft for integration with ERPs or property management tools |
| User Management      | Permission Sets, Profiles, Sharing Rules                        |
| Testing              | Apex Test Classes, Selenium for UI Testing                      |
| Monitoring & Alerts  | Salesforce Health Check, Debug Logs, External Logging Tools     |