

Phase 4: Project Planning

[Project Planning Template]

DATE	10 JUNE 2025
TEAM ID	LTVIP2025TMID29184
Project Name	Lease Management
Maximum Marks	4/5

1. Objective

To define the project’s roadmap, deliverables, timelines, team responsibilities, and risk management strategies, ensuring smooth implementation of the lease management system on Salesforce.

2. Project Scope

In Scope:

- Custom Salesforce objects for leases, tenants, properties, payments.
- Experience Cloud portal for tenant interaction.
- Automation for approvals, reminders, renewals.
- Integration with e-signature and payment systems.
- Custom dashboards and reports.

Out of Scope:

- Third-party property valuation tools.
- In-person lease inspections (handled offline).
- Legacy system migration (only if specified).

3. Timeline (High-Level Gantt Segments)

Phase	Duration	Key Deliverables
Requirements Finalization	1 Week	Validated User Stories, Feature List
Design & Architecture	2 Weeks	Data Model, DFD, UX Mockups

Development	4 Weeks	Custom Objects, Workflows, Integrations
Testing	2 Weeks	Functional, UAT, Security Testing
Deployment	1 Week	Production Deployment, User Setup
Training & Go-Live	1 Week	User Training, Documentation

4. Resource Planning

Role	Responsibility
Project Manager	Planning, tracking, stakeholder communication
Salesforce Developer	Object creation, automation, Apex coding
Admin/Configurator	Setup, permission sets, flows
QA Engineer	Testing functionality and security
Business Analyst	Requirement gathering, validation
UX Designer	Experience Cloud portal and UI design

5. Risk Management Plan

Risk	Likelihood	Impact	Mitigation Strategy
Changing Requirements	Medium	High	Weekly reviews with stakeholders
Integration Delays (e.g. Payments)	Medium	Medium	Parallel testing in sandbox environments
Data Quality from Users	High	Medium	Validations, duplicate management rules
User Adoption Resistance	Medium	High	Training, FAQ documents, early user feedback
Security Misconfigurations	Low	High	Security audit before deployment

6. Communication Plan

- Weekly Review Meetings with stakeholders and tech team.
- Daily Stand-Ups during development and testing.
- Email Reports every Friday summarizing progress, blockers, and action items.
- Collaboration Tools: Jira for tracking, Slack/Teams for communication, Confluence for documentation.

7. Success Metrics

- Reduction in lease approval time by 50%

- 90%+ of lease applications processed digitally
- 0 major security incidents post-launch
- Positive feedback from at least 80% of tenant users (via surveys)