

# Lease Management Project

## Phase 1: Ideation Phase

### [Brainstorming]

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DATE	1 JUNE 2025
TEAM ID	LTVIP2025TMID29184
Project Name	Lease Management
Maximum Marks	4/5

#### Objective:

To generate initial ideas, identify user problems, and explore potential features or solutions that a Lease Management system (using a platform like Salesforce) should offer. This phase aims to lay the foundation for designing a robust and user-centric solution.

#### What is Brainstorming in this Context?

Brainstorming is a creative process where stakeholders (developers, users, managers) collaborate to freely suggest and discuss ideas aimed at improving or innovating lease management processes. In this project, the goal is to solve real-world issues through a digital Lease Management System built on Salesforce.

#### Key Stakeholders (Target Users):

- Tenants
- Landlords
- Property Managers
- Leasing Agents
- Admin & Finance Teams

Steps in Brainstorming for Lease Management:

- 1. Define the Problem Area:
  - Fragmented lease tracking
  - Manual reminders and approvals
  - Poor communication between tenants and landlords
  - Inefficient document handling
  - Lack of centralized system for payments and maintenance tracking
- 2. Create a Safe Space for Ideas:
  - Foster open dialogue
  - Encourage wild ideas—quantity over quality at first
  - Avoid criticism during ideation
- 3. List All Ideas (Sample Suggestions):
  - Auto reminders for lease expiry and rent due
  - Secure digital document storage (agreements, ID proofs)
  - Tenant onboarding and offboarding workflows
  - Lease renewal and approval process automation
  - Rent payment tracking and digital receipts
  - Maintenance request and SLA-based ticketing system
  - Lease clause compliance monitoring
  - Notification alerts via email/SMS
  - Interactive dashboard for lease summary
  - Escalation matrix for unresolved issues

Grouped Categories of Ideas:

Category	Features
Automation Features	Auto-reminders, onboarding flows, approval processes
User Communication	Maintenance requests, alerts, escalations
Document Management	Upload and organize leases and ID documents
Finance & Billing	Rent tracking, invoice generation, digital receipts
Analytics & Reporting	Lease summary dashboards, compliance reports

Prioritized Ideas:

Idea	Description	Category	Priority
Auto-email for lease expiry	Sends alerts 30 days before expiry	Automation	High
Lease document upload	Digital storage of lease agreements	Document Mgmt	Medium

<b>Rent payment tracker</b>	Logs rent transactions with receipts	Finance	High
<b>Tenant onboarding workflow</b>	Automated setup for new tenants	Automation	High
<b>Maintenance request module</b>	Service ticket system for tenants	Communication	Medium
<b>Compliance monitoring</b>	Alerts if lease terms are violated	Analytics	Medium
<b>Dashboard overview</b>	Visual summary of active/inactive leases	Analytics	Medium

### Brainstorming Techniques Used:

- Mind Mapping: To visualize how ideas are interrelated.
- SWOT Analysis:
  - Strengths: Customizable via Salesforce, scalable.
  - Weaknesses: Initial setup complexity.
  - Opportunities: Automation, real-time alerts, centralization.
  - Threats: User adoption, data security concerns.
- Role Storming: Thinking from each stakeholder's viewpoint to identify pain points and needs.

### Brainstorming Output Deliverables:

- Categorized and prioritized feature list
- Use-case identification by stakeholder type
- Visual maps and templates for future phases (e.g., wireframes)
- Foundation for Phase 2 (Requirement Gathering)

# Ideation Phase

## [Empathize and Discover]

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### Objective:

The objective of this phase is to gain a deep understanding of the users and their problems through user research and engagement. This phase focuses on uncovering true user needs, workflows, and challenges to inform requirement gathering and system design.

### What is the Empathize Phase?

Empathizing means stepping into the users' shoes to understand their experiences, feelings, and pain points. This is done through interviews, observation, and empathy mapping to capture insights that lead to meaningful solutions.

### What is the Discover Phase?

The Discover phase involves identifying and gathering all relevant information about the user's current workflows, tools, and challenges. This includes collecting data, reviewing existing systems, and understanding the context of use.

### Key Activities in this Phase:

1. Conduct user interviews and surveys.
2. Observe users interacting with current systems.
3. Create empathy maps and journey maps.
4. Identify user roles and personas.
5. Document workflows, goals, and pain points.
6. Gather feedback on early ideas or prototypes if available.

## **Deliverables of the Empathize and Discover Phase:**

- Empathy Maps for key user roles (Tenant, Manager, Admin).
- User Personas with goals and challenges.
- User Journey Maps showing interaction steps.
- List of key pain points and opportunity areas.
- Insights report to inform solution design in next phases.

## **Empathize and Discover Phase in Salesforce Lease Management**

In the context of Salesforce, the Empathize and Discover phase takes full advantage of the platform's capabilities to observe and map user needs into configurable, scalable solutions. The goal is to bridge the gap between current fragmented practices and a unified, user-centered lease management experience.

### **Salesforce-Focused Empathize Activities**

- Use Experience Cloud to create pilot portals for observation of user interaction with early-stage features.
- Capture Salesforce Chatter conversations and service case histories to understand real-time user frustrations and patterns.
- Interview users across personas to identify gaps in automation, document workflows, and communication tools.

### **Salesforce-Focused Discover Activities**

- Review existing Salesforce org data: custom objects, fields, and automation logic to assess gaps.
- Analyze usage reports and audit logs to understand user engagement and bottlenecks.
- Document requirements as user stories aligned with Salesforce features (e.g., 'As a leasing agent, I want auto-alerts for expiring leases').
- Identify reusable Salesforce components (e.g., Flows, Lightning Components, Approval Processes).

## **Tools and Techniques in the Salesforce Context**

- **\*\*Empathy Maps & Journey Maps:\*\*** Created using Lucidchart, integrated into Salesforce records via attachments.
- **\*\*User Research Dashboards:\*\*** Built using Salesforce Reports to visualize user engagement, common pain points, and feature usage.
- **\*\*Feedback Capture Forms:\*\*** Created in Salesforce with automated routing to Product Teams.

### **Future Design Considerations Based on User Insights**

- AI tools like Salesforce Einstein can eventually predict lease churn or maintenance demand.
- Build for mobile-first interaction, as many stakeholders work in the field.
- Plan configurable workflows, as lease rules may vary across regions and property types.

# Ideation Phase

## [Problem Statements]

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This phase focuses on translating research findings and brainstorming outcomes into clearly defined problem statements. These statements guide requirement gathering and solution design in subsequent stages of the Salesforce Lease Management project.

### Problem Statement Structure

- Title
- Description
- Stakeholders Affected
- Impact
- Opportunity to Solve Using Salesforce

### Expanded Problem Statements

1. Fragmented Lease Tracking
  - Description: Leases are managed across disparate tools such as spreadsheets, shared drives, and emails, leading to lost data and overlooked renewals.
  - Stakeholders Affected: Property Managers, Admin Team
  - Impact: Missed renewals, inefficient operations, compliance issues
  - Opportunity: Centralize lease data in Salesforce using custom objects and dashboards for real-time visibility.
2. Manual Lease Approval Workflows

- Description: Lease renewals and approvals rely on manual email threads with no tracking or audit trail.
- Stakeholders Affected: Leasing Agents, Legal Department, Management
- Impact: Delayed lease execution, errors in approval routing
- Opportunity: Automate workflows in Salesforce using Flow and Approval Processes, enabling auditability and speed.

### 3. 3. Maintenance Tracking Inconsistency

- Description: Maintenance requests are handled via ad hoc phone calls and messages without proper tracking.
- Stakeholders Affected: Tenants, Maintenance Teams
- Impact: Unresolved issues, no SLA enforcement, poor tenant satisfaction
- Opportunity: Leverage Salesforce Case Management to track, assign, and report on maintenance issues with SLA metrics.

### 4. 4. Unstructured Document Management

- Description: Lease-related documents are stored in non-standard formats across platforms, making retrieval hard.
- Stakeholders Affected: Admins, Auditors, Legal
- Impact: Risk of non-compliance, inefficient audits
- Opportunity: Store documents in Salesforce Files with version control and link to specific lease records.

### 5. 5. Lack of Communication and Alerting

- Description: Stakeholders do not receive timely notifications about critical events like rent due dates, lease expirations, or document updates.
- Stakeholders Affected: Tenants, Landlords, Admin Team
- Impact: Missed deadlines, delayed actions, customer dissatisfaction
- Opportunity: Configure Salesforce notifications, email alerts, and SMS through integrations for proactive communication.