

# Phase 1: Problem Understanding & Industry Analysis

## 1. Problem Statement

Non-Governmental Organizations (NGOs) often rely on manual methods (spreadsheets, paper records, or basic tools) to manage donations, volunteers, and events. This leads to:

- Inefficient tracking of donor history and recurring contributions.
- Communication gaps in sending thank-you messages, reminders, and acknowledgments.
- Difficulty in organizing volunteer schedules and event participation.
- Lack of real-time reporting and dashboards for decision-making.

The absence of an integrated system increases administrative overhead and reduces donor/volunteer engagement.

## 2. Objective

To design and implement a **centralized Salesforce-based CRM system** that enables NGOs to:

- Record and manage multiple donation types (money, food, clothes, etc.).
- Automate communication with donors and volunteers.
- Manage volunteer registrations, skills, and event participation.
- Create and track events with associated donors and volunteers.
- Generate insightful reports and dashboards for strategic planning.

## 3. Industry Analysis

- **Current Practices:**
  - Most small and mid-sized NGOs use spreadsheets, emails, or manual registers.
  - Communication with donors and volunteers is inconsistent.
  - Recurring donation management is often missed or tracked poorly.
- **Challenges in the Sector:**
  - Donor retention is low due to lack of acknowledgment.
  - Volunteer motivation decreases without proper recognition.
  - No consolidated view of donation patterns and event success.

- **Technology Opportunity:**

- Salesforce CRM provides a robust platform to build custom objects, automation, and dashboards.
- Native features like Flows, Email Templates, and Reports reduce the need for external tools.
- Scalability allows NGOs to adopt advanced features (e.g., AI donor insights, payment gateway integration) in the future.

#### **4. Expected Benefits**

- **For NGOs:** Centralized and error-free record management.
- **For Donors:** Automated acknowledgments and reminders improve engagement.
- **For Volunteers:** Streamlined registration, scheduling, and recognition.
- **For Admins:** Real-time dashboards to monitor performance and impact.