Phase 1: Problem Understanding & Industry Analysis

1. <u>Requirement Gathering</u>

Functional Requirements:

- Create and manage events with details such as event name, date, time, venue, type, and capacity.
- Provide an external registration form/portal for attendees.
- Automatically capture attendee details (name, email, phone, organization).
- Enable Event Managers to monitor registrations and attendance.
- Send automated notifications: registration confirmation, reminders, and follow-ups.
- Generate reports and dashboards for event performance analysis. **Non-Functional Requirements:**
- System must be user-friendly for both internal users and external attendees.
- Ensure security and privacy of attendee information.
- Scalable to handle multiple simultaneous events.
- Provide real-time reporting and analytics.

2. <u>Stakeholder Analysis</u>

The system involves the following key stakeholders:

- **System Administrator** → Configures Salesforce, manages users, roles, and security.
- **Event Manager** → Creates/manages events, monitors registrations, ensures smooth execution.
- **Sales Representatives** → Share event invitations, track contact/lead registrations.
- **Marketing Team** → Analyzes event performance, ROI, and lead conversion via dashboards.
- **External Attendees** → Register for events, receive confirmations, and participate.
- **Vendors/Partners (Optional)** → Third-party service providers (e.g., catering, sponsors) may require limited access.

3. <u>Business Process Mapping</u>

The Event Registration workflow is designed to streamline the process from event creation to reporting:

1. **Event Creation**: Event Manager defines event details (type, date, venue, capacity).
2. **Promotion**: Sales/Marketing shares registration forms/links with prospects and customers.
3. **Registration**: Attendees register online, and their details are stored in Salesforce.
4. **Confirmation**: System sends automated confirmation emails to registrants.
5. **Pre-Event Communication**: Reminders are sent to attendees before the event.
6. **Event Day Management**: Attendance is tracked (manual check-in or QR-based).

7. **Post-Event Activities**: Feedback is collected, and reports are generated for analysis.

4. Industry-Specific Use Case Analysis

Event registration systems are used widely across industries and even in personal scenarios:

- **Corporate** → Employee training, product launches, client meetings, professional networking events.

- **Education** → Student workshops, guest lectures, career fairs, cultural fests.

- **Healthcare** → Medical camps, awareness programs, vaccination drives.

- **Technology** → Conferences, hackathons, webinars, product demo sessions.

- **Personal Events** → Birthday parties, weddings, reunions where guests register/RSVP.

5. AppExchange Exploration

Salesforce AppExchange offers several event management apps. These provide useful references and inspiration:

App Name	Features	Use Case
Fonteva Events	Full event lifecycle management, attendee registration, payments, reports	Best for large corporations & membership events
Blackthorn Events	Online/onsite registration, check-ins, Salesforce calendar integration, dashboards	Ideal for enterprise events, conferences
Eventbrite Integration	Sync external Eventbrite events with Salesforce, capture attendees as leads	Suitable for marketing-driven public events