Phase 1: Discovery & Requirements Gathering

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# Problem Statement

Organizations seeking to build digital experiences with Salesforce Experience Cloud face the challenge of aligning business goals with technical implementation. Before developing a website or portal, it is crucial to gather clear requirements, identify stakeholders, and establish a foundation that ensures success. Without a structured discovery phase, projects often face scope creep, misaligned objectives, and integration challenges.

# Requirements Gathering

This phase involves collecting comprehensive business and technical requirements to define the scope and direction of the project. Key steps include:

* - Conduct stakeholder interviews to capture expectations and goals.
* - Identify functional requirements such as login, registration, and data access.
* - Define non-functional requirements like performance, security, and scalability.
* - Document integration needs with Salesforce objects, APIs, and external systems.
* - Gather content requirements including text, images, and CMS integrations.

# Objectives

The objectives of Phase 1 include:

* - Establishing clear alignment between business strategy and digital goals.
* - Building a roadmap for Experience Cloud implementation.
* - Reducing risks by validating assumptions early in the process.
* - Ensuring user experience and technical feasibility are balanced.
* - Defining measurable success criteria for the project.

# Stakeholder Analysis

Identifying and analyzing stakeholders is a crucial part of Phase 1. Key groups include:

* - Business Owners: Define strategic goals and KPIs.
* - IT Teams: Ensure integration, security, and system architecture.
* - End Users: Provide insights into usability, functionality, and design needs.
* - Administrators: Manage data, permissions, and long-term governance.
* - External Partners: Contribute requirements for collaboration and portal use.

# AppExchange Exploration

The Salesforce AppExchange provides prebuilt solutions that can accelerate implementation. During Phase 1, the team should explore:

* - Authentication and security packages for login/SSO.
* - CMS connectors for integrating external content systems.
* - Industry-specific components that save development time.
* - Analytics and reporting tools for enhanced insights.
* - Productivity tools to improve collaboration and user adoption.

# Industry Uses

Salesforce Experience Cloud has wide applicability across industries:

* - Healthcare: Patient portals with secure access to medical records.
* - Education: Student and faculty portals for communication and learning.
* - Finance: Client portals for secure document sharing and services.
* - Retail: Customer engagement portals with personalized experiences.
* - Manufacturing: Partner portals for distributors and resellers.

# Additional Considerations

* - Risk assessment to identify potential project challenges early.
* - Budget and resource planning for later phases.
* - Timeline estimation with milestones for each project phase.
* - Governance framework to manage ongoing changes and updates.
* - Documentation standards to ensure knowledge transfer and consistency.