

Subscription / Personal Services Tracker CRM

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- Conducted interviews with small businesses and subscription service providers (e.g., gyms, online courses, OTT platforms) to understand challenges in managing subscriptions.
- Core requirements identified:
 - Users/subscribers should be able to register easily with basic details.
 - Admins should be able to add/manage subscription plans.
 - System should track subscription start/end dates and renewal status automatically.
 - Automatically send email reminders for upcoming renewals or overdue payments.
 - Generate dashboards and reports for admins showing active vs. expired subscriptions, revenue trends, and renewal statistics.

Scope Defined: A centralized platform to manage, track, and automate subscription services for businesses and individual users.

2. Stakeholder Analysis

Primary Stakeholders: - **Subscribers / Users:** Need an easy registration process and timely reminders for subscription renewals. - **Admins / Service Providers:** Want to manage subscriptions, track payments, and monitor overall performance.

Secondary Stakeholders: - **System Administrators:** Ensure data security, flow automation, and reporting accuracy. - **Salesforce Platform:** Provides infrastructure for workflow automation, dashboards, and scalability.

Stakeholder roles are clearly mapped to project requirements.

3. Business Process Mapping

Current Process (Manual): - Subscription plans are tracked via spreadsheets or offline systems. - Manual reminders are sent to users. - Admins struggle to monitor active vs. expired subscriptions. - Reporting is time-consuming and prone to errors.

Proposed Process (Automated with Salesforce): - Users register via Salesforce form. - Admins create subscription plans linked to users. - System automatically tracks start/end dates and status (Active/Expired). - Automated reminders are sent via email before renewal dates. - Dashboards provide real-time insights into subscription trends, revenue, and renewals.

Automation replaces manual steps, ensuring efficiency, transparency, and accuracy.

4. Industry-Specific Use Case Analysis

- Subscription-based services are growing rapidly (gyms, OTT platforms, SaaS).
- Challenges faced by service providers:
 - Missed renewals due to lack of automated reminders.
 - Difficulty tracking revenue trends and subscriber retention.
 - Manual reporting is error-prone and time-consuming.

Our Salesforce Solution: - Centralized Subscriber and Plan data. - Automated renewal reminders and status updates. - Reports and dashboards for real-time insights. - Easy-to-use interface for both admins and subscribers.

Industry Gap Identified: - Existing subscription management tools are either too complex or not customizable for small businesses. - Salesforce CRM provides a flexible and scalable solution to bridge this gap.

5. AppExchange Exploration

- Explored existing subscription management apps on Salesforce AppExchange:
 - SaaS Subscription Management apps
 - Billing & Payment Automation apps

Findings: - Most apps are enterprise-focused and expensive. - Few offer customizable workflows for small businesses or personal services.

Decision: - Build a custom Salesforce solution using standard objects (Contact, Account, Opportunity) and custom objects (Subscription Details) with automation flows and email reminders.