

# Project Title: Smart Event Management System with Automated Volunteer Assignment

## Problem Statement

Event management is a fast-growing industry that involves handling multiple stakeholders, including clients, vendors, volunteers, and internal teams. Currently, many event companies face challenges such as manual tracking of bookings, difficulty in coordinating with vendors, lack of transparency in budget approvals, and limited real-time reporting. These inefficiencies lead to errors like double-booking venues, vendor scheduling conflicts, and missed deadlines, ultimately affecting customer satisfaction.

The **Smart Event Management CRM** aims to solve these issues by leveraging Salesforce as a unified platform for event planning, vendor management, client communication, and revenue tracking. By automating processes, enabling real-time collaboration, and providing actionable reports, the solution ensures streamlined operations and better decision-making for event managers and stakeholders.

---

## Requirement Gathering

To understand the scope of the project, the following requirements were gathered by analyzing industry practices and interacting with potential stakeholders:

- **Event Tracking:** Ability to manage event details such as venue, date, budget, and expected attendees.
- **Client Management:** Support for client registration, corporate bookings, and personalized services.
- **Vendor Allocation:** Assign vendors for catering, logistics, decoration, and stage setup with availability checks.
- **Approval Workflows:** Automate approvals for high-value events, such as those exceeding a defined budget threshold.
- **Reporting:** Generate reports for revenue, vendor utilization, and event performance.

These requirements ensure that the system addresses real-world event management challenges.

---

## Stakeholder Analysis

The system will serve different roles, each with distinct responsibilities:

- **Admin** – Responsible for configuring and managing the Salesforce CRM setup.
- **Event Manager** – Creates and manages events, assigns vendors, and monitors execution.
- **Vendors** – Provide services (catering, decoration, etc.) and need visibility into allocated events.
- **Clients** – Book events, register for participation, and receive confirmations.

- **Finance Team** – Approves high-budget events and monitors payment and revenue flow.

By clearly defining stakeholders, the project ensures that access, permissions, and responsibilities align with business needs.

---

## Business Process Mapping

The flow of event execution can be represented as:

1. **Client Request** → Client requests an event (wedding, conference, concert, etc.).
2. **Event Creation** → Event Manager creates the event in Salesforce with details like venue, date, and budget.
3. **Vendor Allocation** → Vendors are assigned to handle specific event services.
4. **Approval** → If the budget exceeds the defined threshold, it goes to Finance Team for approval.
5. **Notifications** → Once approved, notifications are sent to Clients and Vendors.
6. **Execution & Reporting** → The event takes place, and reports are generated for tracking performance and revenue.

This process map highlights how Salesforce automation will reduce manual effort and ensure accuracy.

---

## Industry-Specific Use Case Analysis

The event management industry deals with:

- **Time-sensitive operations:** Events must be planned and executed within strict deadlines.
- **Resource dependency:** Vendor availability, venue booking, and budgeting are interlinked.
- **Client expectations:** Clients demand transparency, quick confirmations, and professional execution.

By implementing Salesforce, the system can:

- Avoid scheduling conflicts through automation.
  - Provide real-time visibility of vendor and venue availability.
  - Generate insights on revenue and event performance, improving business decisions.
- 

## AppExchange Exploration

During the research phase, existing event management apps on Salesforce AppExchange were explored. While some solutions exist for niche purposes (like ticketing or volunteer management), most are either too generic or too advanced for learning-focused projects.

Hence, **this project builds a custom solution tailored for event companies**, ensuring full control over design while also serving as a strong capstone for Salesforce certification.

---

## Phase 1: Requirement Gathering

**Objective:** The aim of this phase is to understand what needs to be built, who will use it, and what exact problems the system must solve.

**Activities:**

We begin by identifying stakeholders such as administrators (college/organization heads), event organizers (student coordinators or staff), and participants (students, attendees). Through interviews and questionnaires, their expectations and pain points are collected. Organizers, for instance, want an easy way to create and promote events without repetitive manual work. Participants want a simple registration process and timely updates. Administrators want consolidated reporting on event participation and outcomes.

We also document both **functional requirements** (like event creation, participant registration, notifications, dashboards) and **non-functional requirements** (security of participant data, performance under high traffic, mobile-friendly access).

**Deliverables:** A **Requirement Specification Document** containing a list of user stories, example workflows, and prioritization of features.