Phase 1 Report: Problem Understanding & Industry Analysis

Cover Page

Project Title: Event Registration & Attendee Management – Salesforce Project
Phase: 1 – Problem Understanding & Industry Analysis

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# 1. Introduction

Salesforce is a leading cloud-based Customer Relationship Management (CRM) platform that enables organizations to manage customer relationships, streamline business processes, and enhance productivity.

The purpose of this project is to analyse the challenges in event management and propose a Salesforce-based solution that provides automation, centralized data, and real-time reporting.

Screenshot 1: Salesforce Logo or Salesforce Homepage
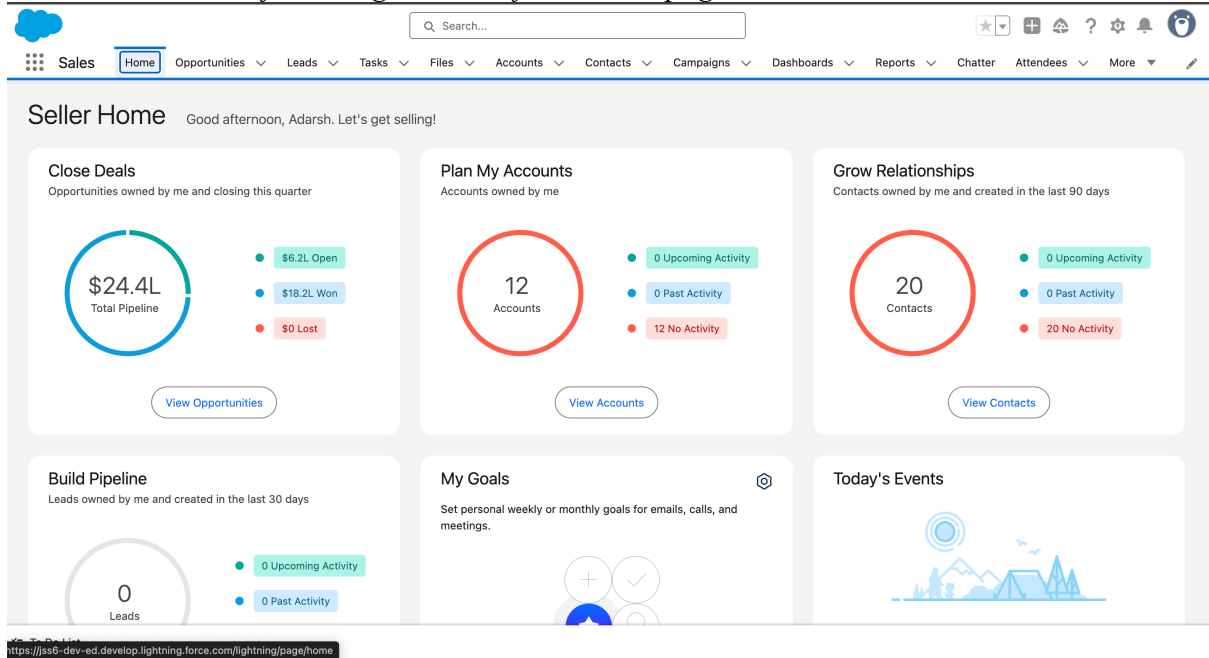
2. Problem Statement

Traditional event management faces multiple challenges:

- Manual registration using spreadsheets or forms
- Lack of real-time tracking for attendees
- No automated communication (emails/SMS)
- Difficulty in analyzing event success

3. Industry Analysis

Different industries face challenges in managing events:

- **Education** – managing student workshops and seminars
- **Corporate** – tracking training sessions and conferences
- **Entertainment** – handling ticketing and registrations
- **NGOs** – organizing fundraising and awareness campaigns

These industries typically face issues such as duplicate data, poor communication, and lack of central visibility.

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4. Proposed Salesforce Solution

Our Salesforce-based solution includes:

- **Custom Objects** – Event & Attendee
- **Relationships** – Each attendee linked to an event
- **Automation** – Flows and Email Alerts for confirmations
- **Dashboards** – Real-time event insights

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5. Benefits of the Solution

- Streamlined event registration
- Automated confirmation emails to attendees
- Centralized data in Salesforce for tracking
- Real-time dashboards for event organizers
- Scalable and customizable solution for different industries

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6. Conclusion

The analysis shows that traditional event management processes are inefficient and prone to errors. By leveraging Salesforce, we can automate processes, improve attendee experience, and provide organizers with better visibility and control.

The next phase (Phase 2) will focus on **Org Setup & Configuration**.