

# Phase 1: Problem Understanding & Industry Analysis

## Project Title

Project Management Tool on Salesforce

## Industry

Project Management / Team Collaboration / Software Development

## Project Type

B2B Salesforce Sales Cloud / Service Cloud Implementation

## Target Users

- **Project Managers** (team leaders managing projects end-to-end)
- **Team Members** (developers, designers, and contributors)
- **Stakeholders** (executives and clients tracking project progress)
- **Resource Managers** (capacity planning and resource allocation)
- **Portfolio Managers** (multi-project oversight and strategic planning)

## 1. Problem Statement

Organizations across industries struggle with effective project management due to scattered tools and manual processes. The existing project tracking is highly manual — involving spreadsheets, emails, and disconnected systems with poor visibility.

This leads to:

- **Missed deadlines** and unclear task priorities
- **Lack of centralized project information** and documentation
- **Manual status updates** and time-consuming reporting
- **Inefficient resource allocation** and team overload

The goal is to implement a Salesforce-based Project Management Tool that:

- **Simplifies** task creation, assignment, and tracking
- **Centralizes** all project data, documents, and communication
- **Enables** real-time collaboration through Salesforce platform
- **Automates** notifications for deadlines, approvals, and status changes

## Proposed Solution:

A Project Management Tool on Salesforce that:

- Allows teams to create, assign, and track tasks efficiently
- Provides a central dashboard for project status and resource utilization
- Automates notifications (Email/Chatter) for due dates and updates
- Integrates AI-driven insights to predict delays and optimize resources

## 2. Requirement Gathering

**Project Managers:** Need a comprehensive platform to plan, execute, and monitor projects with full visibility.

**Team Members:** Need clear task assignments with priorities, deadlines, and easy status updates.

**Executives/Stakeholders:** Need high-level dashboards for portfolio tracking, budget monitoring, and KPI visibility.

**Resource Managers:** Need capacity planning tools to allocate team members across multiple projects.

**Clients:** Need transparent progress visibility and milestone tracking through customer portals.

## 3. Stakeholder Analysis

### Primary Stakeholders:

- **Project Managers** (daily system users)
- **Team Members** (task executors)

### Secondary Stakeholders:

- **Executives / C-Suite** (strategic decision makers)
- **Clients / External Stakeholders** (progress monitors)

### Tertiary Stakeholders:

- **Resource Managers** (capacity planners)
- **Finance Team** (budget controllers)
- **Salesforce Administrators** (system configurators)

### Stakeholder Mapping:

- Project Managers → System Owners / Power Users
- Team Members → End Users / Task Executors
- Executives → Strategic Decision Makers
- Clients → External Portal Users
- Resource Managers → Capacity Planners
- System Admins → Technical Setup & Automation

## 4. Business Process Mapping

### Current Scenario (Without Salesforce):

- Manual task tracking through emails and spreadsheets
- Project details scattered across multiple tools and documents
- No automated reminders for deadlines or approvals
- Difficulty in tracking progress, budget, and resource utilization

### **Proposed Future (With Salesforce):**

- Online project portal through Salesforce Lightning Experience
- Centralized task and milestone management with real-time updates
- Automated workflows for task assignments, approvals, and escalations
- Alerts for approaching deadlines, overdue tasks, or budget overruns
- AI insights for resource optimization and project health scoring

### **5. Industry-specific Use Case Analysis**

1. **Project Creation:** Define scope, objectives, budget, and timeline with automated setup
2. **Task Management:** Create, assign, and track tasks with dependencies and priorities
3. **Resource Allocation:** Assign team members to projects with capacity tracking
4. **Time Tracking:** Log hours worked on tasks for billing and productivity analysis
5. **Milestone Tracking:** Monitor key deliverables with approval workflows
6. **Budget Management:** Track project costs against budget with variance alerts
7. **Risk & Issue Management:** Log and monitor risks and issues with mitigation plans
8. **Analytics Dashboard:** Track project health, resource utilization, and team performance

### **6. AppExchange Exploration**

#### **Potential Salesforce AppExchange Solutions to Leverage:**

- **Project Management Apps** → For Gantt charts and advanced scheduling (Inspire Planner, Taskfeed)
- **Time Tracking Apps** → To monitor hours and billable time (Replicon, FinancialForce)
- **Resource Management Apps** → For capacity planning and allocation (Hub Planner, Certinia)
- **Collaboration Apps** → For team communication and document sharing (Quip, Slack Integration)
- **Analytics & Reporting Apps** → For advanced dashboards and insights (Tableau CRM, CRM Analytics)