

Phase 1 - Problem Understanding & Industry Analysis

This document will provides a detailed summary of all analysis and planning tasks completed for Phase 1 of the Salon Management System project. The objective of this phase was to clearly define the business problem and create a comprehensive plan before beginning development.

1. Requirement Gathering

- **Purpose:** To define the complete data model needed to run the salon, including all the specific information that must be captured.
- **Steps Followed:**
 1. **Client Information (Contact Object):** The standard `Contact` object was chosen to store client data. Required fields were identified as `First Name`, `Last Name`, `Mobile Phone`, `Email`, and a custom rich-text field for `Client Notes` (for allergies, preferences, etc.).
 2. **Service Information (Product Object):** The standard `Product` object was designated to store the salon's price book. Required fields include `Service Name`, `Price`, and a custom `Duration (Minutes)` number field, which is critical for scheduling.
 3. **Staff Information (User Object):** The standard `User` object was chosen to manage employees, requiring fields for `Full Name`, `Email`, `License`, and `Profile`.
 4. **Appointment Information (Custom Object):** A new custom object, `Appointment__c`, was designed as the central object to connect all other data points. Required fields include a `Client` lookup, a `Stylist` lookup, a `Service` lookup, a `Date/Time` field, and a `Status` picklist.

2. Stakeholder Analysis

- **Purpose:** To identify the key users of the system and understand their primary goals and needs.
- **Steps Followed:**
 - Three primary stakeholders were identified:
 - **The Salon Owner:** Needs high-level dashboards and sales reports.
 - **The Receptionist:** Needs an easy-to-use calendar and a fast booking process.
 - **The Stylist:** Needs access to their schedule and client-specific notes.

Stakeholder Role	Name (Example)	Their Primary Goal	What They Need from the System
Salon Owner	Jane Reid	Grow the business, increase profit, and ensure smooth operations.	High-level dashboards, sales reports, and staff performance metrics.
Receptionist	Sam Kumar	Manage the schedule efficiently, avoid booking errors, and handle client check-ins quickly.	An easy-to-use calendar, quick access to client information, and a simple booking process.

Stylist	Priya Singh	Provide excellent service and build client relationships.	Access to their daily schedule and client-specific notes (preferences, formulas).
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3. Business Process Mapping

- **Purpose:** To document the salon's current manual processes ("As-Is") and design the improved, automated future processes ("To-Be").
- **Steps Followed:**
 - **Booking Process:** The current slow, manual process of using a paper diary was mapped. The future process was designed around the receptionist using a single screen in Salesforce to find a client, view availability, and create an Appointment record instantly.
 - **Client History Process:** The current process, which relies on the stylist's memory, was mapped. The future process was designed around the stylist using the Salesforce mobile app to instantly view a client's complete history, including past services and technical notes.

4. Industry-Specific Use Case Analysis

- **Purpose:** To analyze unique processes for the beauty and wellness industry that the Salesforce system must be designed to handle.
- **Steps Followed:**
 - **Use Case 1 (Complex Client Data):** Identified the need to store technical data like hair color formulas. The solution is a custom rich-text field on the Contact object.
 - **Use Case 2 (Duration-Based Scheduling):** Identified that services have different lengths. The solution is a custom Duration (Minutes) field on the Service object, which will be used by our automation to prevent double-bookings.
 - **Use Case 3 (Client Rebooking):** Identified the business need to encourage rebooking at checkout. The solution is a "Check-Out" Screen Flow that will make it easy for the receptionist to book the next appointment.

5. AppExchange Exploration

- **Purpose:** As a professional best practice, an analysis of the Salesforce AppExchange was conducted to determine if a pre-built solution could meet the salon's needs.
- **Steps Followed:**
 1. Searched the AppExchange for terms like "Salon Management" and "Appointment Scheduling."
 2. **Findings:** Several powerful but expensive solutions exist for large franchises. Many generic scheduling apps lack salon-specific features (like storing color formulas).
 3. **Conclusion:** A custom-built solution was determined to be the most cost-effective and tailored approach for this specific business, providing the exact features