

Ideation Phase

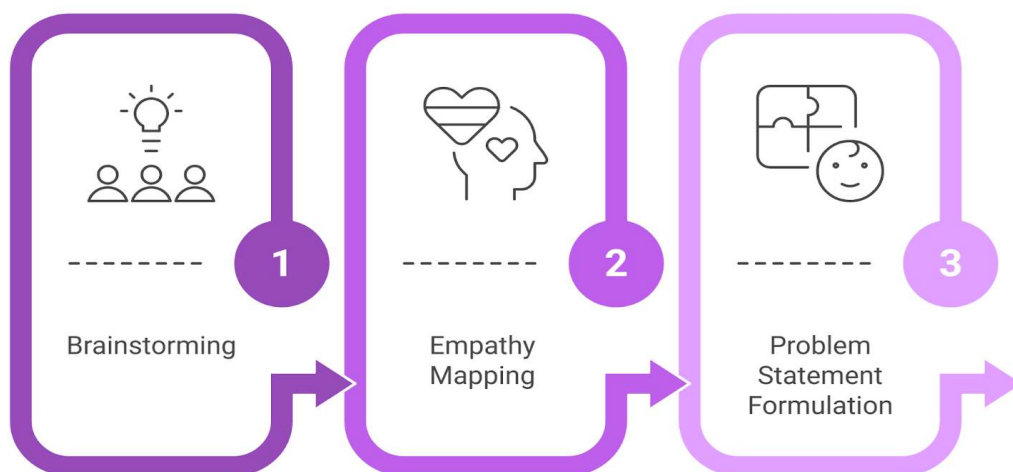
The Ideation Phase serves as the foundation of any successful project. It blends creativity, user empathy, and structured thinking to identify the core problem, generate meaningful ideas, and prioritize solutions that bring value to users. Where creativity and structured thinking combine to find meaningful and impactful documentation

In our project titled: “A CRM Application for Public Transport Management System”. This phase was critical to ensure we built a system tailored to the actual challenges faced by RTC departments, bus station managers, conductors, and passengers.

The ideation phase included three main steps:

1. Brainstorming
2. Empathy Mapping
3. Problem Statement Formulation

Ideation Phase Steps



1. ♦ Brainstorming & Idea Prioritization Template

Step 1: Team Gathering, Collaboration, and Selecting the Problem Statement

Our team convened with the goal of identifying inefficiencies in existing RTC systems and proposing a tech-driven solution using Salesforce. Through collaborative meetings, online whiteboards, and use-case discussions, we collectively explored pain points faced by public transport staff and administrative heads. We reviewed real-world operations and identified that most RTC systems rely heavily on manual workflows for managing:

- Bus trip schedules and fares
- Driver and conductor assignments
- Ticket fare collection
- Monthly performance reporting

After several discussions, we clearly defined the core issue:

Problem Statement:

"RTC departments lack a unified digital platform for managing buses, employees, ticketing, and operational metrics in real time. Existing manual processes are inefficient, error-prone, and restrict access to performance insights."

This became the backbone of our project scope.

Step 2: Brainstorm, Idea Listing, and Grouping

We performed a team-wide brainstorming session using a digital board where everyone contributed raw ideas. The ideas were categorized into themes:

- **Data Management:** centralized employee, bus, and trip data
- **Automation:** real-time fare calculation, role-based triggers
- **Reporting:** monthly dashboards for trip count, passenger data, and revenue
- **Validation & Access Control:** rule-based data integrity and secure access

From around 25–30 ideas, we grouped and shortlisted the ones that aligned directly with operational efficiency.

Step 3: Idea Prioritization

Each grouped idea was evaluated on:

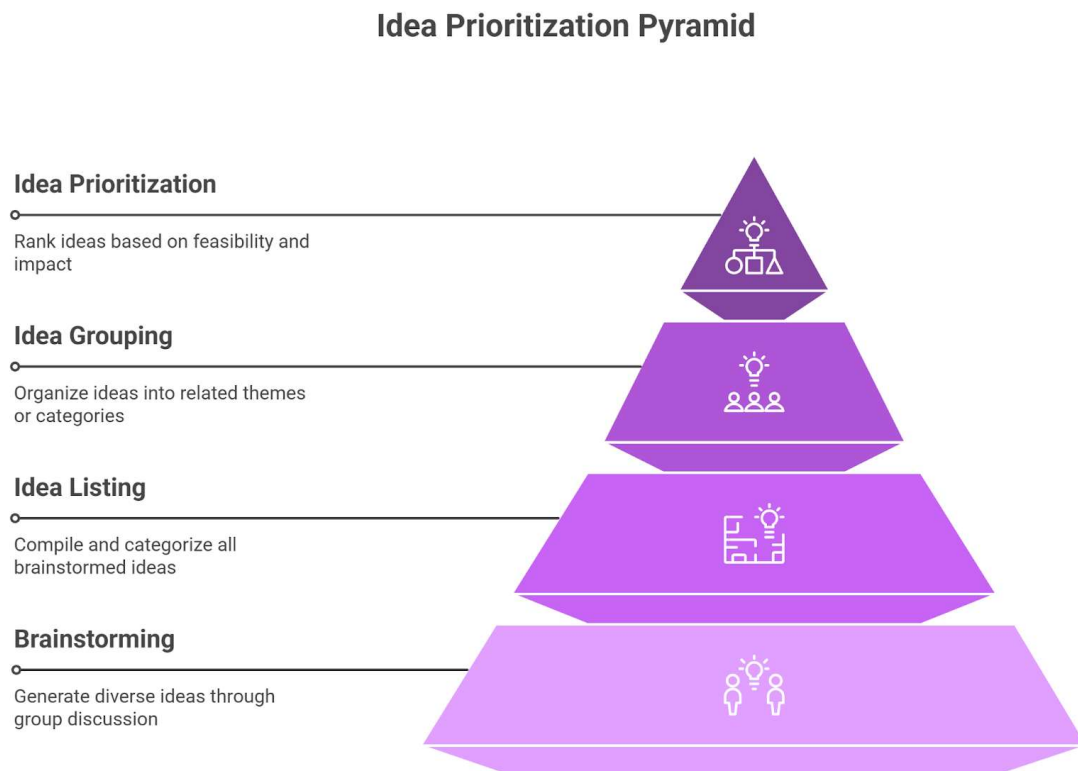
- **Feasibility:** How easily it could be implemented on Salesforce
- **Impact:** The significance of the feature on transport operations
- **Urgency:** Whether it solved a current, pressing problem

We created a decision matrix that helped us arrive at an **MVP** (Minimum Viable Product) plan:

- **Top Priority Features:**

- Automated fare and passenger data updates
- Role-based employee assignment (Driver/Conductor)
- Trigger-based alerts for invalid assignments
- Real-time summary dashboards (e.g., trips, passengers, revenue)
- Controlled and dependent picklists for bus and route management

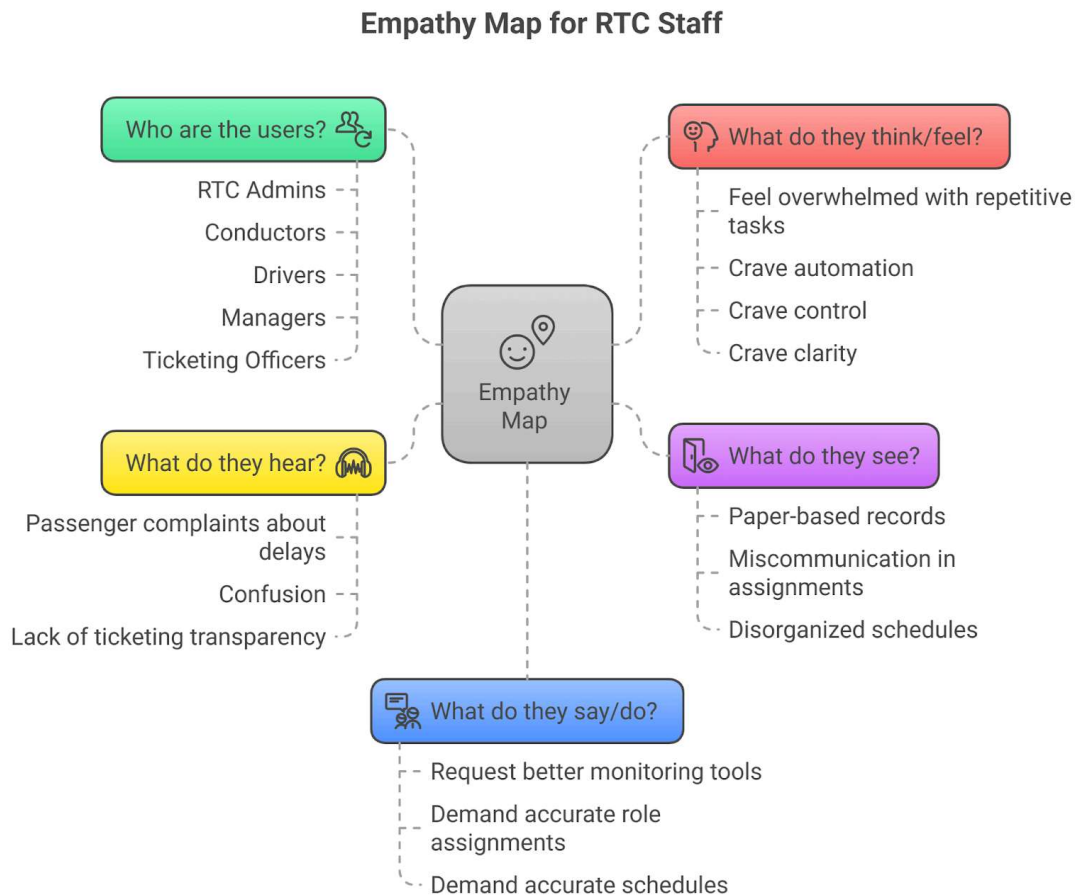
These features formed the scope of our system design in the later phases.



◆ Empathy Mapping- Empathize & Discover

Empathy Map Canvas

An empathy map is a visual tool that helps teams deeply understand their users' experiences, pains, and expectations. We used it to map the daily journey of RTC staff, including administrators, bus station managers, and field employees.



By stepping into the user's shoes, we ensured that our Salesforce CRM features (formulas, flows, triggers, dashboards) directly addressed their key frustrations.

◆ Define the Problem Statements

Customer Problem Statement Template

To build a successful solution, it's essential to clearly define what the customer/user is struggling with. This helped us stay focused on delivering real-world impact instead of just implementing technical features.

Final Customer Problem Statement:

RTC departments manage public transportation manually using disconnected systems. This leads to data inconsistency, assignment errors, revenue loss, and lack of real-time performance visibility. A centralized Salesforce CRM system can digitize workflows, ensure accuracy, and provide actionable insights through dashboards, flows, and automation. This statement aligns with the end user's expectations and guided our object design, validations, formulas, triggers, and reports.

