Phase 1 – Problem Understanding & Industry Analysis

1️⃣ Requirement Gathering

Purpose:
Collect all necessary information about what your Flood Relief CRM must do.

Steps:

1. Identify **key requirements**:
    a. Track **donations** (Money, Food, Medicine, Clothes)
    b. Track **urgent relief requests**
    c. Update donors about their contributions
    d. Assign **volunteers** to relief requests
2. Document **expected outcomes** and pain points.

2️⃣ Stakeholders

Purpose:
Identify all people or roles who will interact with or benefit from the CRM.

Key Stakeholders:

Role	Responsibility
Admin	Manage CRM setup & permissions
Donor Manager	Track donations & communicate with donors
Volunteer Coordinator	Assign volunteers to requests

Donors	Provide donations
Volunteers	Fulfill relief requests
Govt. Officers	Monitor disaster relief efforts

3 Business Process Mapping

Purpose:
Visualize the flow of tasks and data in the CRM.

Steps:

1. Define the workflow:

Donor → CRM log → Relief Request → Volunteer Assignment → Distribution → Donor Update → Dashboard

2. Map **Salesforce objects** to each part of the process:
    a. Donations → Donation__c
    b. Relief Requests → Relief_Request__c
    c. Volunteers → Volunteer__c
    d. Distribution → Distribution__c
    e. Updates/Notifications → Flow/Email Alerts

4 Industry Examples

Purpose:
Understand how other organizations manage disaster relief using CRMs.

Steps:

1. Research NGOs like **Red Cross**.
2. Observe features they use:

a. Donation tracking

b. Volunteer management

c. Reporting dashboards

5 AppExchange Exploration

Purpose:
Explore ready-made Salesforce solutions for reference or inspiration.

Steps:

1. Visit **AppExchange → Nonprofit Success Pack (NPSP)**.
2. Check features:
    a. Donation & volunteer management
    b. Campaigns & fundraising
    c. Reporting & dashboards

6 Result

- Requirements clearly documented
- Stakeholders identified
- Business process mapped
- Industry examples & AppExchange features explored
- Ready to move to **Phase 2 – Salesforce Setup & Objects**