

“Government Schemes Management System”

Stakeholders:

Citizens / Beneficiaries, Verification Officers, Scheme Managers, Finance Teams, Government Authorities.

Problem Statement

Government launches multiple welfare schemes (education, healthcare, agriculture, housing, employment) but faces challenges due to the absence of a centralized system:

- Citizens struggle with manual application processes and lack of status visibility.
 - Verification officers face delays in validating documents and eligibility.
 - Managers cannot effectively monitor approvals, fund utilization, or grievances.
 - Authorities lack real-time data for decision-making, leading to inefficiencies and reduced transparency.
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Proposed Solution: Government Schemes CRM

A Salesforce-based Government Schemes Management System addresses these issues by:

- Centralizing scheme applications and citizen records.
- Automating verification, approval, and fund disbursement processes.
- Tracking grievance cases and resolution timelines.

- Providing dashboards to monitor applications, approvals, funds utilized, and complaints resolved.
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Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Citizen registration and scheme application via Salesforce portal.
 - Online document submission and eligibility validation.
 - Automated assignment of applications to verification officers.
 - Approval/rejection workflow with manager-level access.
 - Fund disbursement tracking linked to approved applications.
 - Notifications (Email/SMS) for status updates.
 - Grievance handling system for complaints and follow-ups.
 - Secure, scalable, and user-friendly platform accessible in local languages.
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Stakeholder Analysis

Primary Stakeholders (Direct Users):

- **Citizens/Beneficiaries** – Apply for schemes, upload documents, track application status.
- **Verification Officers** – Validate applications and update eligibility.
- **Scheme Managers** – Approve/reject applications, monitor utilization.
- **Finance Teams** – Record and track fund disbursements.

Secondary Stakeholders:

- **Government Authorities** – Review reports, dashboards, and scheme performance.
 - **System Admins / IT Teams** – Manage roles, permissions, and integrations.
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Business Process Mapping

- Citizen submits application online (linked to scheme).
 - System performs basic eligibility checks automatically.
 - Verification officer reviews documents and updates status.
 - Scheme manager approves/rejects the application.
 - Finance team records and tracks fund disbursement.
 - Citizen receives status updates and notifications.
 - Grievances are logged and resolved via the system.
 - Dashboards display scheme performance, applications, funds disbursed, and complaints resolved.
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Use Cases

1. Citizen Application Management

- Citizens register and apply for multiple schemes.
- Upload required documents (income proof, ID, etc.).

2. Verification & Approval Workflow

- Verification officers validate details.

- Managers approve/reject applications with remarks.

3. Fund Disbursement Tracking

- Finance records payments for approved applicants.
- System updates payment status (Disbursed, Pending).

4. Grievance Redressal

- Citizens raise complaints via the portal.
- Officers track and resolve grievances within timelines.

5. Reporting & Dashboards

- Reports show total applications, approvals, and rejections.
- Dashboards track funds utilized, pending cases, and scheme-wise performance.

AppExchange Exploration

- **Salesforce Public Sector Solutions** – Provides frameworks for citizen case management and government workflows.
- **Fundraising/Grant Management Apps** – Useful for inspiration in managing funds and applications.
- **Document Management Apps** – Helps with secure citizen document uploads and verification.