Contact Management System

Problem Statement

• Businesses face challenges in managing and organizing customer contacts effectively.
• Customer data often remains scattered in spreadsheets or multiple disconnected tools.
• This leads to duplication, inconsistency, and loss of critical information.
• Sales and support teams struggle to track customer interactions and communication history.
• Missed follow-ups reduce customer satisfaction and weaken relationships.
• Managers lack real-time visibility into team performance and customer engagement.
• A centralized Salesforce-based Contact Management System is needed to solve these challenges.

1. Requirement Gathering

The goal is to capture what the system must achieve from the perspective of end users and business stakeholders.

- **Core Requirements**:
  - Store and manage customer contact details (name, phone, email, address).
  - Track all customer interactions (calls, meetings, emails, follow-ups).
  - Generate reports on customer engagement and sales activities.
  - Automate reminders and notifications for follow-ups.
  - Provide dashboards for managers to track team performance.
- **Advanced Requirements (Optional)**:
  - Integration with email/calendar systems.
  - Role-based security (Sales Rep vs. Manager access).
  - Mobile access for field teams.

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2. Stakeholder Analysis

Identify all key stakeholders who will use or benefit from the system.

Stakeholder	Role	Needs/Expectations
Sales Representatives	End Users	Quick access to customer details, log interactions easily, get reminders for follow-ups.

Stakeholder	Role	Needs/Expectations
Sales Managers	Supervisors	View dashboards, analyze team performance, track customer engagement.
Customer Support Team	Service	Maintain history of customer issues and resolutions.
Business Owners	Decision Makers	Insights into customer relationships, sales pipeline, and customer satisfaction.
Salesforce Admin/Dev	System Support	Manage configurations, customization, automation, and ensure data security.

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3. Business Process Mapping

This maps the current flow of how customer contacts are managed vs. how Salesforce will streamline it.

As-Is Process (without Salesforce):

- Contacts stored in Excel sheets or separate tools.
- Communication history scattered across emails, calls, and notes.
- No centralized reporting → limited visibility for managers.

To-Be Process (with Salesforce):

1. Capture customer details in Salesforce (Contact & Account).
2. Log every interaction under the customer record (custom Interaction object).
3. Automate follow-up tasks/reminders using Flows.
4. Generate real-time reports and dashboards for performance monitoring.
5. Enable role-based access for security and collaboration.

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4. Industry-specific Use Case Analysis

Industry Focus: Sales & CRM (Customer Relationship Management)

- **Retail/E-commerce**: Track customer orders, preferences, and interactions for personalized engagement.
- **Banking/Finance**: Manage client portfolios, meetings, and investment discussions.
- **Healthcare**: Maintain patient contact info and history of consultations.
- **IT/Software Services**: Track leads, client communications, and project updates.

For your capstone, you can choose **Sales/Service industry** as the primary use case (most relatable and aligns with Salesforce CRM strengths).

5. AppExchange Exploration

Before building custom features, check if existing solutions on **AppExchange** can be leveraged. Examples:

- **Conga Composer** → for document/email generation.
- **CalendarAnything** → for scheduling and interaction tracking.
- **TaskRay** → for task and follow-up management.
- **Nintex Drawloop** → workflow automation.