

PROJECT TITLE - CONTACT TRAINING TRACKER

Problem Statement

The current library management process is fragmented, with manual record-keeping of books, members, and transactions. This leads to inefficiencies such as misplaced books, difficulty in tracking due dates, lack of insights into popular titles, and poor user experience for both librarians and members. A centralized Salesforce-based solution is required to streamline book inventory, lending, returns, and reporting.

Requirement Gathering

- Identify core objectives (book catalog, lending, returns, penalties, reporting).
- Capture functional requirements (inventory management, user search, due date alerts).
- Define non-functional requirements (scalability, mobile access, ease of use).
- Prioritize features (MVP: lending/returns → advanced: reservations, digital library).
- Collect compliance needs (data privacy, member information security).
- Establish KPIs (loan turnaround time, overdue reduction, member satisfaction).

Stakeholder Analysis

- **Librarians** – need simple workflows for managing inventory and members.
- **Library Members** – want easy search, lending, and tracking of borrowed books.
- **Admins** – require system monitoring, reporting, and audit trails.
- **IT/Developers** – handle customization, integration, and maintenance.
- **Management** – seek insights into usage trends, costs, and efficiency gains.
- Map roles to Salesforce access (profiles/permissions).

Business Process Mapping

- Book acquisition → cataloging → availability in system.
- Member registration → validation → assignment of ID.

- Lending process: request → issue → due date → return → fine if overdue.
- Reservation process: hold request → waitlist management → notification.
- Reporting: most borrowed books, overdue lists, usage trends.
- Escalation process: lost/damaged books → replacement or penalty.

Industry-specific Use Case Analysis

- **Academic libraries** – track textbooks, digital resources, and student borrow limits.
- **Corporate libraries** – manage research reports, restricted materials, access logs.
- **Public libraries** – handle large member base, community events, membership tiers.
- **Digital-first libraries** – e-books, multimedia content, integration with e-readers.
- Benchmark against industry practices (e.g., fines, memberships, interlibrary loans).
- Assess compliance with local educational/copyright policies.

AppExchange Exploration

- Review Salesforce-native library management apps (if available).
- Explore related solutions (inventory, asset management, or learning systems).
- Identify accelerators (pre-built dashboards, flows, components).
- Evaluate licensing costs vs. custom build.
- Check community reviews, ratings, and compatibility with Salesforce editions.
- Shortlist tools for possible pilot/proof of concept.