

## **PROJECT TITLE - CONTACT TRAINING TRACKER**

### **Problem Statement**

The current library management process is manual and fragmented, making it difficult to track books, manage user memberships, and monitor borrow/return activities efficiently. This leads to poor user experience, limited reporting, and lack of integration with modern digital tools. A Salesforce-based Library Management System will streamline operations, automate workflows, and provide a scalable solution with analytics and integration options.

### **Requirement Gathering**

- Identify core library operations (book cataloging, lending, returns, reservations).
- Define data requirements (books, authors, members, borrowing history).
- Capture user types and their needs (librarians, members, administrators).
- List mandatory features (search, check-in/out, overdue alerts, fines).
- Document functional vs non-functional requirements (performance, security).
- Establish success criteria (e.g., "Members can borrow books with automated due date reminders").

### **Stakeholder Analysis**

- Identify key stakeholders (librarians, students, faculty, IT, finance).
- Define roles and responsibilities (decision-makers vs end-users).
- Gather stakeholder expectations (efficiency, usability, cost reduction).
- Prioritize stakeholders' influence vs interest in the system.
- Conduct interviews/workshops to validate needs.
- Align stakeholders on project objectives and constraints.

### **Business Process Mapping**

- Document existing manual workflows (book issue, return, fines).
- Identify inefficiencies (duplicate records, overdue tracking delays).
- Map "as-is" vs "to-be" processes using Salesforce capabilities.
- Define automation opportunities (Flows for check-in/out, reminders).
- Align process mapping with Salesforce data model (custom objects, relationships).

- Validate mapped processes with stakeholders before design.

### **Industry-Specific Use Case Analysis**

- Borrowing & returns lifecycle → automate due dates, overdue notifications.
- Membership management → track member levels, renewals, restrictions.
- Catalog management → support books, journals, digital media.
- Fines & penalties → auto-calculate overdue fees, integrate with payments.
- Reporting & dashboards → show usage trends, overdue rates, popular titles.
- Integration → connect with student portals, payment gateways, or e-libraries.

### **AppExchange Exploration**

- Search for pre-built library management solutions on Salesforce AppExchange.
- Compare solutions (cost, features, scalability).
- Identify reusable apps (document management, membership apps).
- Evaluate pros/cons of customizing vs using AppExchange apps.
- Run pilot/demo of shortlisted apps with stakeholders.
- Decide on "buy vs build" strategy for faster implementation.