Phase 1: Problem Understanding & Industry Analysis

1. **Requirement Gathering**

We spoke with different stakeholders (EV users, operators, and managers) to collect requirements.

**Key Requirements :**

* Customers should be able to book charging slots online.
* Operators should track station availability in real-time.
* The system must prevent double bookings of the same slot.
* Secure digital payment management for each session.
* Notify users about station breakdowns and suggest alternatives.
* Generate reports like Peak Usage Hours, Most Used Stations, and Revenue Trends.

1. **Stakeholder Analysis**

* **Admin (Salesforce Team / Project Owner) :**

1. Configures Salesforce org
2. Manages data model, automations, integration

* **Operators (Station Staff) :**

1. Manage charging slot bookings
2. Report breakdowns
3. Monitor real-time availability

* **Managers (Business Decision Makers) :**

1. Review financial **reports & station performance**
2. Approve refunds or escalations
3. Track maintenance.

* **EV Customers (End Users) :**

1. Book charging slots
2. Make payments
3. View history, invoices, and loyalty points
4. **Business Process Mapping**

**Flow Example:**

* EV user requests a booking
* Operator/system checks station availability
* If available → Booking confirmed
* Payment is processed securely
* After charging session → Session closed
* System updates reports & analytics
* If breakdown → Maintenance ticket auto-created, users notified

1. **Industry-Specific Use Case Analysis**

* EV stations have **limited slots** → critical need to prevent double booking
* **Station uptime** and **maintenance tracking** are essential for customer trust
* Payments must be **secure and trackable**
* Global trend

1. **AppExchange Exploration**

* Existing Salesforce apps focus on **fleet management** and **utility monitoring**.
* Very few apps are tailored specifically for **EV Charging Management**.
* We decided to build a **custom EV Charging Station CRM** in Salesforce to:
* Learn end-to-end CRM customization.
* Address industry-specific gaps.
* Gain practical Salesforce Admin + Developer skills.