# Phase 1: Problem Understanding & Industry Analysis

## 1. Introduction

The first phase of the WhatNext Vision Motors Salesforce CRM Implementation focused on understanding the underlying problem, analyzing the automotive industry context, gathering requirements from stakeholders, mapping business processes, and evaluating existing Salesforce solutions through AppExchange. This phase was crucial to lay a strong foundation for the design and implementation of the CRM system. By carefully studying industry challenges and aligning them with organizational objectives, the project team ensured that the solution would be both practical and scalable.

## 2. Requirement Gathering

The requirement gathering process involved structured discussions, workshops, and review sessions with key stakeholders, including:  
- Sales Managers – to understand vehicle order management, dealer assignment, and lead conversion challenges.  
- Dealer Executives – to identify pain points in inventory tracking, test drive scheduling, and customer communication.  
- Service Agents – to explore issues in managing post-sale service requests and customer escalations.  
- Customers (end users) – through survey feedback highlighting the need for faster response times, transparent communication, and easy booking of test drives or service appointments.

Key requirements identified:

1. Automate dealer assignment based on customer location.  
2. Prevent orders for vehicles out of stock with real-time validation.  
3. Enable test drive booking with reminders.  
4. Streamline service request tracking.  
5. Provide dashboards for managers to track operations.  
6. Ensure role-based access and compliance with data privacy rules.

## 3. Stakeholder Analysis

A RACI matrix was created to define roles and responsibilities:

|  |  |  |
| --- | --- | --- |
| Stakeholder | Role in Project | Responsibility |
| Project Sponsor | Executive oversight, budget approval | Accountable |
| Salesforce Admin | Configurations, object creation, user management | Responsible |
| Developers | Apex triggers, batch jobs, integrations | Responsible |
| Sales Managers | Provide process insights, validate requirements | Consulted |
| Dealer Executives | Share dealer-level challenges, test prototypes | Consulted |
| Service Agents | Provide feedback on service flows | Consulted |
| Customers | Feedback on usability and expectations | Informed |

## 4. Business Process Mapping

To understand existing workflows and identify inefficiencies, AS-IS vs TO-BE process maps were created.  
  
- AS-IS (Current State)  
 • Manual dealer assignment by sales reps.  
 • Paper-based or phone-based test drive scheduling.  
 • Stock verification handled offline, often leading to order delays.  
 • Service requests tracked in spreadsheets with no escalation mechanism.  
  
- TO-BE (Future State with Salesforce CRM)  
 • Automated dealer assignment via location-based logic.  
 • Online test drive scheduling with email reminders.  
 • Stock validation automated via Apex triggers.  
 • Centralized service request management with escalation flows.  
 • Dashboards and reports for real-time visibility.

## 5. Industry-Specific Use Case Analysis

The automotive industry is undergoing rapid transformation, with increasing emphasis on:  
- Customer experience – Buyers expect seamless engagement from inquiry to delivery.  
- Digital automation – Manual processes slow down response time, leading to lost sales.  
- Service excellence – After-sales service is as critical as vehicle sales.  
- Dealer coordination – Efficient dealer management improves operational efficiency.  
  
By comparing WhatNext Vision Motors’ needs with industry best practices (e.g., Tata Motors’ Salesforce CRM digitization, Tesla’s customer-centric service tracking), the project identified critical use cases:  
1. Centralized vehicle and dealer management.  
2. Automated test drive workflows.  
3. Real-time order and inventory tracking.  
4. Enhanced customer communication through alerts.  
  
This ensured the solution was aligned with global automotive CRM trends.

## 6. AppExchange Exploration

To avoid reinventing the wheel, Salesforce AppExchange marketplace was explored for pre-built solutions and add-ons. Relevant findings included:  
- Dealer Management Apps – providing insights into dealer performance and stock tracking.  
- Service Management Add-ons – extending case and request handling.  
- Email/Notification Utilities – pre-built templates for customer reminders.  
  
While many apps provided useful features, the project team decided on a hybrid approach:  
- Use native Salesforce tools (Flows, App Builder, Reports, Dashboards) for core CRM processes.  
- Keep AppExchange apps as future enhancements, ensuring flexibility and cost-efficiency in the current phase.

## 7. Conclusion of Phase 1

Phase 1 successfully established the problem statement, requirements, and solution direction for the WhatNext Vision Motors CRM project. Through stakeholder engagement, industry benchmarking, and process mapping, the team ensured that the solution would be customer-focused, scalable, and industry-relevant.  
  
This phase laid the groundwork for the design and development phases, ensuring clarity on “what needs to be built” before moving into “how it will be built.”