Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Problem Statement: Construction companies often struggle to manage communication among multiple stakeholders such as clients, project managers, vendors, contractors, and subcontractors. Since updates, approvals, and requirements are exchanged through scattered channels like phone calls, emails, and spreadsheets, important information is often lost or delayed. This lack of a centralized system results in miscommunication, project delays, cost overruns, and reduced client satisfaction.

Proposed Solution : A tailored Construction CRM solution is needed to streamline communication, track tasks, manage vendor/contractor interactions, and provide real-time project updates, thereby improving efficiency, accountability, and client trust.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering:

Objective: Identify all functional and non-functional requirements for the Construction CRM.

- **Activities:**
    - Conduct interviews with project managers, clients, contractors, and vendors to understand their communication challenges.
    - Collect details about current processes like task assignment, follow-ups, approval workflows, and reporting.
    - Determine must-have features: centralized communication, task tracking, vendor/contractor management, client updates, and automated alerts.

2.Stakeholder Analysis:

- **Objective:** Identify all stakeholders and understand their needs, influence, and involvement in the CRM system.
- **Key Stakeholders:**
    - **Clients / Project Owners:** Need real-time updates and transparency on project progress.
    - **Project Managers:** Require task assignment, monitoring, and reporting tools.

- o **Contractors / Subcontractors:** Need clear communication about tasks, deadlines, and approvals.
- o **Vendors / Suppliers:** Must provide material updates, invoices, and delivery timelines efficiently.
- o **Finance/Admin Team:** Track payments, contracts, and compliance requirements.

3.Business Process Making:

- **Objective:** Document current workflows and identify pain points.

- **Current Process:**
  1. Clients communicate project requirements via calls/emails.
  2. Project Managers assign tasks manually to contractors.
  3. Vendors provide material updates and invoices via email or phone.
  4. Status updates are scattered, leading to miscommunication and delays.

  - **Pain Points:**
    1. No centralized tracking of communication.
    2. Delays in approvals and updates.
    3. High dependency on manual follow-ups.

4. Industry Use Case Specific:

- **Objective:** Understand how CRM solutions are used in construction to solve similar problems.

- **Use Cases Identified:**
  - Centralized project dashboards for multiple ongoing projects.
  - Automated task assignment and reminders to contractors/vendors.
  - Tracking vendor performance, material deliveries, and payment schedules.
  - Real-time client reporting and communication updates.
  - Historical record keeping for audits and compliance.

5.AppExchange Exploration:

- **Objective:** Explore existing CRM solutions for construction industry to identify features and gaps.

- **Findings:**

  - **Large ERP/CRM tools (e.g., Salesforce Construction Cloud, Zoho Projects)** exist but may be costly or complex for SMEs.

- **Opportunities:** Build a **customized, lightweight CRM** tailored to SMEs or mid-sized construction companies with:
  - o Centralized communication
  - o Task & workflow management
  - o Vendor/contractor management
  - o Reporting & analytics