# 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.
  + **Contractors / Subcontractors:** Need clear communication about tasks, deadlines, and approvals.
  + **Vendors / Suppliers:** Must provide material updates, invoices, and delivery timelines efficiently.
  + **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:**

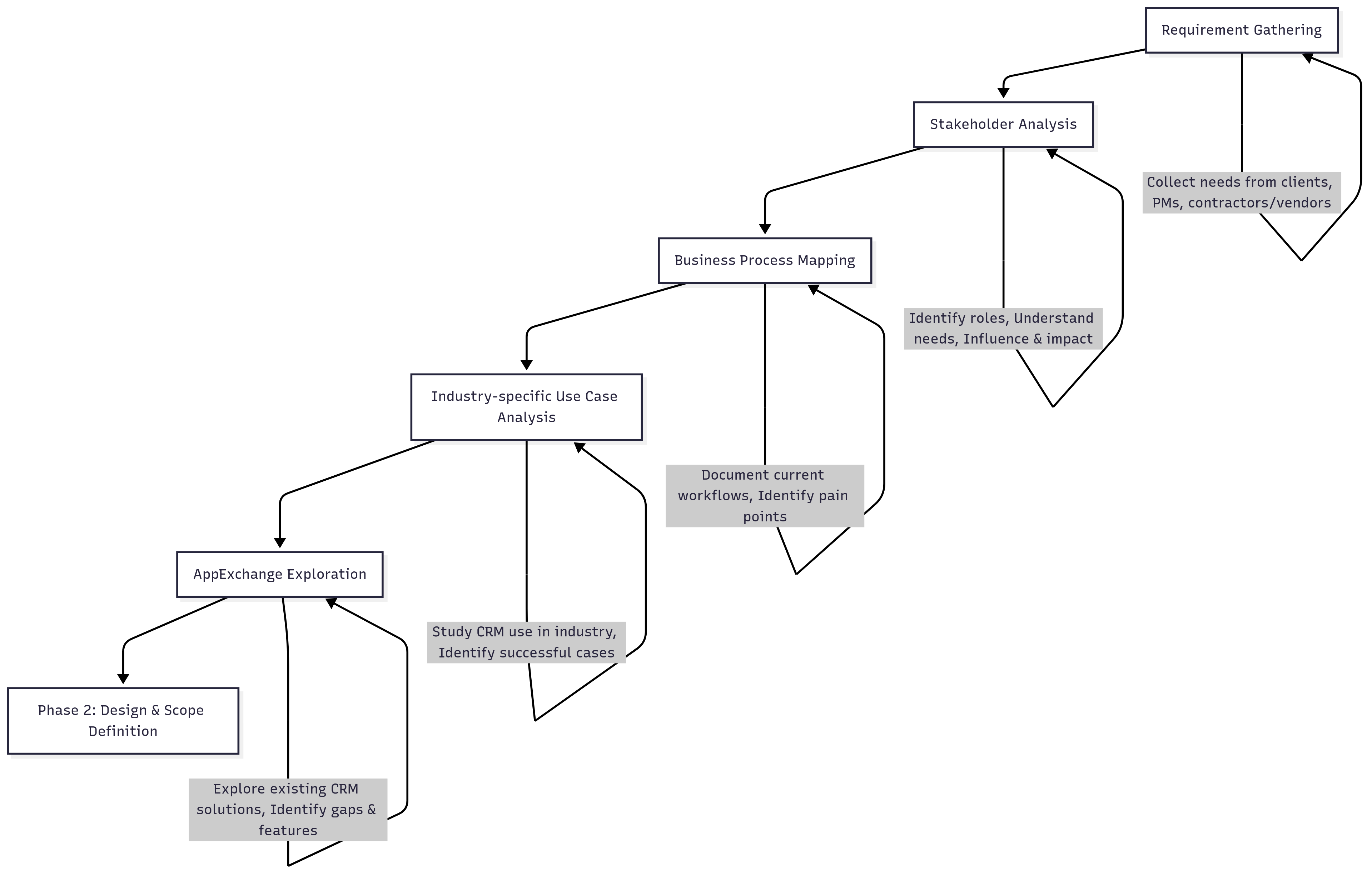
* Centralized project dashboards for multiple ongoing projects.
* Automated task assignment and reminders to contractors/vendors.
* Tracking vendor performance, material deliveries, and payment schedules.
* Real-time client reporting and communication updates.
* Historical record keeping for audits and 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:
  + Centralized communication
  + Task & workflow management
  + Vendor/contractor management
  + Reporting & analytics

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