Project Design Phase
Problem – Solution Fit

Date	28 June 2025
Team ID	LTVIP2025TMID29793
Project Name	Calculating Family Expenses using Service Now
Maximum Marks	2 Marks

Problem–Solution Fit:

The *Problem–Solution Fit* for this project reflects how the *Calculating Family Expenses Using ServiceNow* system addresses key challenges faced by families in managing their household expenses. It ensures that the solution aligns with real user needs, behavioral patterns, and pain points, ultimately improving adoption and effectiveness.

Purpose

- **Solve complex problems** in a way that fits the actual needs and state of families managing expenses.

- **Accelerate adoption** by designing the solution around familiar behaviors (e.g., logging expenses, reviewing budgets).

- **Sharpen communication and engagement** by aligning features with what matters most to users, such as budget control and transparency.

- **Build trust** by addressing frequent and significant frustrations like disorganized records, lack of alerts for overspending, and inefficient tracking methods.

- **Understand and improve the existing situation** by creating a structured, automated system that simplifies financial management for families.

Problem–Solution Summary

Identified Problem	Proposed Solution
Disorganized manual tracking of daily and household expenses	Centralized system with linked Family and Daily Expenses tables
No alerts when household budgets are exceeded	Automated budget monitoring and notification using business rules
Difficulty linking daily expenses to family-level budgets	Related lists and relationships between Daily and Family Expenses records
Lack of categorized reports to analyze spending patterns	Categorization of expenses and capability for reporting within ServiceNow
High effort required for manual data entry and monitoring	Custom forms, auto-numbering, and automation to simplify data entry and review

Outcome

By achieving problem–solution fit, this project ensures:

- Families can efficiently track, manage, and review their expenses.

- The system integrates naturally into users' behavior, reducing friction and increasing adoption.

- The solution directly solves pain points that impact household financial well-being, building trust and long-term engagement.

Template:

Problem-Solution fit canvas 2.0

Purpose / Vision

Define CS, fit into CC

1. CUSTOMER SEGMENT(S) `CS`

- Families managing household budgets (e.g. working parents, guardians, or family heads responsible for expenses)
- Tech-savvy family members who support household financial tracking

6. CUSTOMER CONSTRAINTS `CC`

- Limited time to enter and manage data
- Need for simplicity (non-technical users)
- Dependence on free or existing platforms (budget constraints for tools)

5. AVAILABLE SOLUTIONS `AS`

- Manual tracking (pen, paper, Excel sheets) — low cost, but prone to error and difficult to link data
- Budgeting mobile apps — user-friendly, but no custom family-level linkage or advanced reporting
- No centralized solution that integrates daily + family-level data + budget monitoring

Explore AS, differentiate

Focus on J&P, tap into BE, understand RC

2. JOBS-TO-BE-DONE / PROBLEMS `J&P`

- Record daily and family-level expenses in an organized way
- Link daily expenses to household budget easily
- Monitor and stay within a set monthly budget
- Generate reports for financial review

9. PROBLEM ROOT CAUSE `RC`

- No dedicated, automated system to link individual expenses to family-level budget in real-time
- Traditional tools are fragmented and error-prone

7. BEHAVIOUR `BE`

- Record expenses in a notebook or spreadsheet
- Occasionally check receipts and try to summarize spending manually
- Rarely review expenses until an issue arises

Focus on J&P, tap into BE, understand RC

Identify strong TR & EM

3. TRIGGERS `TR`

- Rising household costs or overspending incidents
- Need to review monthly spending patterns
- Planning for savings or specific family financial goals

4. EMOTIONS: BEFORE / AFTER `EM`

- Before: Disorganized, stressed, anxious about overspending
- After: In control, confident, relieved with clear expense visibility

10. YOUR SOLUTION `SL`

- A centralized system built on ServiceNow with:
- Family Expenses and Daily Expenses tables linked via relationships
- Auto-numbering for tracking entries
- Budget monitoring business rules that send alerts
- Reports generated for categorized spending
- User-friendly custom forms for easy data entry

8. CHANNELS of BEHAVIOUR `CH`

8.1 ONLINE
- Look for budgeting templates, Google Sheets, or apps; search for tips on saving

8.2 OFFLINE
- Collect and review receipts; informal discussions on spending; note expenses manually

Extract online & offline CH of BE

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