Ideation Phase Brainstorm & Idea Prioritization

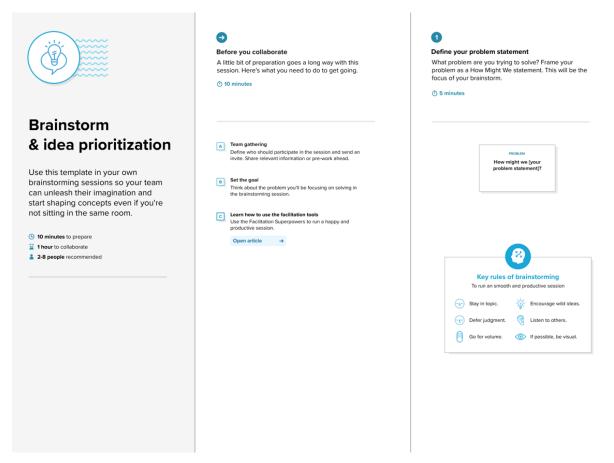
Date	24 June 2025
Team ID	LTVIP2025TMID31109
Project Name	Field Service WorkOrder Optimization

Brainstorm & Idea Prioritization Template:

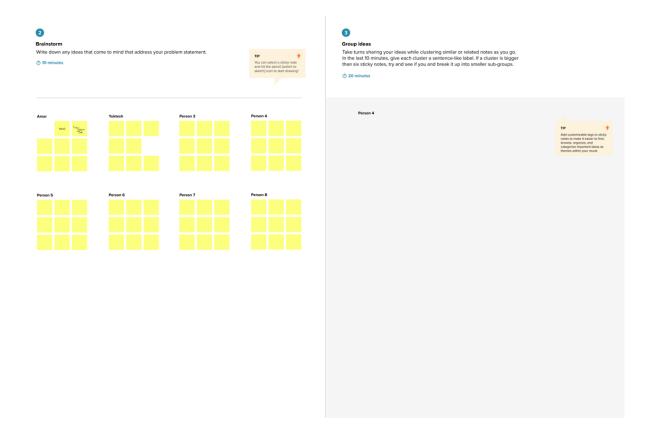
Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

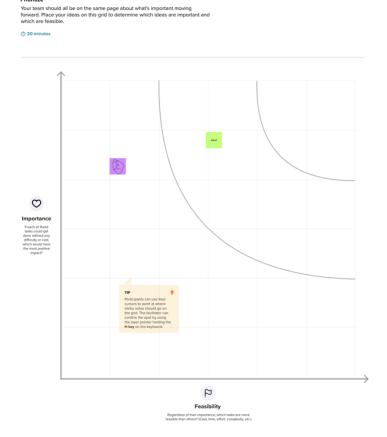
Step-1: Team Gathering, Collaboration and Select the Problem Statement



Step-2: Brainstorm, Idea Listing and Grouping



Step-3: Idea Prioritization



Step-1: Team Gathering, Collaboration and Select the Problem Statement

Selected Problem Statement:

Field technicians are assigned to tasks manually, causing delays and inefficiencies. There is no automated system to match technicians based on their skills, availability, and location. This project aims to automate the WorkOrder assignment process using Salesforce to improve response time, reduce errors, and streamline communication.

Step-2: Brainstorm, Idea Listing and Grouping

S.No	Idea	Group/Category
1	Use custom objects for Technician, WorkOrder, and Assignment	Data Modeling
2	Use Apex triggers to assign technicians automatically	Automation
3	Match technician skills and location with WorkOrder details	Assignment Logic
4	Send email notifications to assigned technicians	Communication
5	Use dashboards and reports to monitor assignments and status	Reporting
6	Schedule monthly cleanup of old records using batch Apex	Maintenance & Cleanup

Step-3: Idea Prioritization

Priority Level	Idea	Justification
High	Apex trigger for automatic assignment	Solves the main problem – technician assignment
High	Email notification to technicians	Keeps technicians informed in real-time
Medium	Dashboard for WorkOrder tracking	Helps admin and management monitor task flow
Medium	Lookup relationships between objects	Needed to relate data effectively
Low	Scheduled deletion of old WorkOrders	Improves performance but not urgent initially