

# AutoCare Pro - Smart Vehicle Service Management

## Phase 1: Problem Understanding & Industry Analysis

15-Day Sprint Documentation

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### Project Overview

**Project Name:** AutoCare Pro - Smart Vehicle Service Management

**Timeline:** 15 days total implementation

**Industry:** Automotive Services

**Implementation:** Salesforce Service Cloud + Mobile

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### Business Problem Statement

**Client:** Premier Auto Service (8-bay repair shop, 200+ vehicles/month)

#### Critical Pain Points:

1. **Manual Scheduling** → 15-20% double bookings, customer complaints
2. **Paper Work Orders** → Lost documents, illegible notes, no tracking
3. **No Customer Updates** → 45+ daily "status check" calls
4. **Manual Inventory** → Frequent stockouts, emergency orders
5. **No Performance Data** → Cannot identify profitable services or top technicians

#### Business Impact:

- **Customer Satisfaction:** 3.1/5 (below industry average)
  - **Daily Admin Time:** 3+ hours handling status calls
  - **Revenue Loss:** \$2,500/month from scheduling conflicts
  - **Technician Efficiency:** 65% (vs 80% industry benchmark)
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### Key Stakeholders

Role	Count	Primary Need	Success Metric
Service Advisors	2	Quick customer check-in, real-time updates	50% reduction in status calls
Technicians	5	Mobile work orders, parts availability	25% more jobs completed/day
Shop Manager	1	Performance visibility, automated reports	Real-time dashboard
Customers	200+	Service transparency, convenient scheduling	4.5/5 satisfaction score

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## Current vs Future Process

### Current State (Broken):

Phone Call → Paper Calendar → Handwritten Work Order →  
Manual Parts Check → Multiple Status Calls → Paper Invoice

**Problems:** 15 manual steps, 2.5 days average, 22% rework rate

### Future State (Salesforce-Enabled):

Online Booking → Digital Work Order → Mobile Updates →  
Automated Notifications → Digital Payment → Follow-up Survey

**Benefits:** 8 automated steps, 1.8 days average, 5% rework rate

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## Industry Analysis

### Market Context:

- **Industry Size:** \$116B US automotive aftermarket
- **Digital Adoption:** Only 34% of shops use digital systems
- **Customer Expectations:** 89% want real-time service updates

### Competitive Advantage:

- **Technology Gap:** Most local competitors still use manual processes
  - **Customer Experience:** Mobile-first approach differentiates from chain competitors
  - **Efficiency Gains:** 25%+ productivity improvement possible
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## Solution Components

### Core Salesforce Features:

- **Service Cloud:** Cases, Work Orders, Customer Management
- **Mobile App:** Technician field access
- **Process Builder:** Automated workflows
- **Lightning Pages:** Custom dashboards

### AppExchange Add-ons:

- **SMS Notifications:** Customer updates (\$25/month)
- **Digital Signatures:** Service authorizations (\$25/month)
- **Document Generation:** Professional invoices (\$30/month)

**Total Monthly Cost: \$80/month (vs \$300+ for specialty software)**

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## Success Metrics & ROI

### Key Performance Indicators:

Metric	Current	Target	Impact
Customer Satisfaction	3.1/5	4.5/5	Retention +15%
Daily Status Calls	45 calls	10 calls	3 hours saved
Scheduling Accuracy	80%	98%	Revenue +\$2,500/month
Technician Productivity	6.2 jobs/day	8.0 jobs/day	Capacity +25%

### ROI Calculation:

- **Investment:** \$5,000 (licenses + setup)
  - **Annual Savings:** \$50,000+ (efficiency + retention)
  - **Payback Period:** 1.2 months
  - **12-Month ROI:** 900%
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## 15-Day Implementation Plan

### Week 1 (Days 1-5): Foundation

- **Day 1-2:** Org setup, user creation, basic configuration
- **Day 3-4:** Data model design (Vehicle, Work Order, Service History)
- **Day 5:** Data import preparation and initial user training

## **Week 2 (Days 6-10): Automation**

- **Day 6-7:** Process Builder workflows (notifications, updates)
- **Day 8-9:** Mobile app setup and technician training
- **Day 10:** Customer communication automation (SMS, email)

## **Week 3 (Days 11-15): Go-Live**

- **Day 11-12:** Reports, dashboards, final testing
- **Day 13:** Staff training and system walkthrough
- **Day 14:** Soft launch with limited customers
- **Day 15:** Full production launch and support

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## **Critical Success Factors**

### **Must-Haves for Success:**

1. **Data Quality:** Clean customer and vehicle data import
2. **User Adoption:** All staff trained and comfortable with mobile app
3. **Process Automation:** Key workflows automated (notifications, updates)
4. **Customer Communication:** Real-time SMS/email notifications working

### **Implementation Risks & Mitigation:**

- **Risk:** Staff resistance to technology
- **Mitigation:** Hands-on training, gradual rollout
- **Risk:** Data migration issues
- **Mitigation:** Parallel systems for first week

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## **Phase 1 Requirements Summary**

### **Functional Requirements:**

- Digital work order creation and management
- Mobile access for technicians
- Automated customer notifications

- Real-time inventory tracking
- Performance reporting dashboard

### **Technical Requirements:**

- Salesforce Service Cloud implementation
- Mobile app deployment for 5 technicians
- SMS integration for customer updates
- Data migration from existing systems
- User training and change management

### **Business Requirements:**

- 50% reduction in customer status calls
- 25% improvement in technician productivity
- 98% scheduling accuracy
- 4.5/5 customer satisfaction score
- Real-time operational visibility for management

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## **Phase 1 Deliverables**

### **Completed:**

- [x] Business problem analysis and stakeholder requirements
- [x] Current state process documentation
- [x] Industry analysis and competitive positioning
- [x] Solution architecture and component selection
- [x] ROI analysis and success metrics definition
- [x] 15-day implementation roadmap

### **Ready for Phase 2: Org Setup & Configuration**

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## **Next Steps**

### **Immediate Actions (Next 24 Hours):**

1. Salesforce Developer Org setup
2. User account creation for all stakeholders
3. Basic company and business hours configuration
4. Initial data model planning session

**Phase 2 Focus:** Convert requirements into working Salesforce configuration with profiles, roles, and custom objects.

**Success Milestone:** By Day 5, all users can log in and basic work order creation is functional.