AutoCare Pro - Smart Vehicle Service Management

Phase 1: Problem Understanding & Industry Analysis

15-Day Sprint Documentation



Project Name: AutoCare Pro - Smart Vehicle Service Management

Timeline: 15 days total implementation

Industry: Automotive Services

Implementation: Salesforce Service Cloud + Mobile

© Business Problem Statement

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

Critical Pain Points:

- 1. **Manual Scheduling** \rightarrow 15-20% double bookings, customer complaints
- 2. Paper Work Orders → Lost documents, illegible notes, no tracking
- 3. No Customer Updates \rightarrow 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)

EX 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

Current vs Future Process

Current State (Broken):

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

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

Future State (Salesforce-Enabled):

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

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

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

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)

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	7 6.2 jobs/day	8.0 iobs/day	Capacity +25%

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ROI Calculation:

• **Investment:** \$5,000 (licenses + setup)

• **Annual Savings:** \$50,000+ (efficiency + retention)

• Payback Period: 1.2 months

• 12-Month ROI: 900%

4 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

© 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

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:

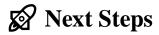
- 50% reduction in customer status calls
- 25% improvement in technician productivity
- 98% scheduling accuracy
- 4.5/5 customer satisfaction score
- Real-time operational visibility for management

✓ 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



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.