**Project Title: NGO Donor & Volunteer CRM**  
**Phase: 1**

**Problem Statement:**

NGOs face challenges in managing donors, tracking donations, and coordinating volunteers effectively. Manual processes such as spreadsheets or paper-based records cause delays, errors, and lack of transparency. This results in poor donor follow-up, inconsistent volunteer engagement, and limited insights for directors and managers.

The NGO Donor & Volunteer CRM aims to overcome these issues by providing a Salesforce-based application that:

* Centralizes donor, donation, volunteer, and event records.
* Automates acknowledgments and high-value donation approvals.
* Improves volunteer assignment and event coordination.
* Offers dashboards and reports for real-time decision-making.

**Problem Understanding & Industry Analysis**

This phase focuses on analyzing NGO operations, identifying stakeholder needs, and aligning the CRM solution with nonprofit practices. The key activities include:

1. **Requirement Gathering**
   * Understand NGO needs: donor tracking, donation approvals, volunteer coordination, and event management.
   * Key requirements include donation acknowledgment emails, duplicate prevention, volunteer scheduling, and performance reporting.
2. **Stakeholder Analysis**
   * **Admin:** Configures and maintains the system.
   * **Donor Manager:** Engages with donors and tracks contributions.
   * **Volunteer Manager:** Allocates volunteers to events and monitors activities.
   * **Director:** Approves large donations and reviews NGO-wide reports.
3. **Business Process Mapping**
   * Example Flow: Donor makes contribution → Donor Manager records it → If donation exceeds a threshold, Director approves → Donor receives acknowledgment → Reports updated → Volunteer Manager assigns volunteers to related events if required.
4. **Industry-Specific Use Case Analysis**
   * NGOs depend on donations and volunteer efforts; mismanagement can harm reputation and funding.
   * Donor engagement and transparency in donation usage are critical.
   * Effective volunteer management improves event success and outreach.
5. **AppExchange Exploration**
   * Existing “Nonprofit Success Pack (NPSP)” apps exist, but this project builds a simpler custom CRM to focus on core learning while addressing NGO needs.