

Phase 1: Requirement Gathering & Analysis

Problem Statement

Finding reliable and verified local service providers such as plumbers, electricians, and cleaners is often a challenge.

Customers frequently face delays, lack of trust, and no proper tracking of service requests.

On the other hand, service providers struggle with managing bookings, handling payments, and maintaining smooth communication with customers.

This gap creates inefficiency, dissatisfaction, and missed opportunities for both customers and providers.

Project Overview

The proposed solution is a **Local Business Service CRM** that bridges the gap between customers and service providers.

This platform will streamline the process of booking, managing, and completing service requests while ensuring trust and transparency.

Key Features:

- Customers can request services online (plumbing, electrician, cleaning, etc.).
- Service providers receive job notifications and can accept or reject them.
- Automated reminders for scheduled services (e.g., AC maintenance every 6 months).
- Ratings and feedback system to improve service quality.
- Admin (agency/company) can track overall requests, completed jobs, and revenue.

This system ensures that customers get timely and reliable services, while providers can manage their operations more effectively.

Objectives

The main objectives of the project are:

- **Improve efficiency** – Enable quick and hassle-free service booking for customers.
 - **Automate tasks** – Reduce manual effort with service reminders, job assignments, and payment follow-ups.
 - **Ensure data accuracy** – Maintain verified service provider details and customer history.
 - **Enhance user experience** – Provide trusted providers, easy booking, and faster response times.
 - **Better reporting** – Offer clear tracking of requests, jobs, and revenues for business insights.
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Activities in Phase 1

1. Requirement Gathering

- Identify pain points of customers and service providers.
- Collect both functional and non-functional requirements.
- Define the scope and limitations of the project.

2. Stakeholder Analysis

- **Customers** – Service seekers who need reliable and timely services.
- **Service Providers** – Professionals such as plumbers, electricians, and cleaners.
- **Admin/Agency** – The entity managing operations, ensuring smooth communication, and tracking performance.

3. Business Process Mapping

The process flow will include:

- Service request submission by the customer.
 - Provider assignment and acceptance/rejection.
 - Job completion and confirmation.
 - Feedback collection and payment processing.
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4. Industry-specific Use Case Analysis

- **AC Service Reminders** – Automated notifications every 6 months for maintenance.
- **Urgent Plumber Booking** – Ability to book a plumber within 2 hours for emergencies.
- **Cleaning Services** – Scheduled weekly or monthly cleaning with reminders.
- **Electrician Services** – Quick booking for urgent electrical issues.

These use cases ensure the system caters to both regular and emergency needs.

5. AppExchange Exploration

- Explore existing Salesforce applications that can support or extend the CRM's functionality.
 - Identify reusable components to save time and cost.
 - Evaluate integration possibilities with payment gateways, notification systems, and reporting tools.
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Conclusion

Phase 1 focuses on understanding the challenges faced by customers and service providers, defining clear objectives, and mapping out the business processes.

By analyzing industry-specific use cases and exploring existing solutions, the foundation is set for

building a **Local Business Service CRM** that ensures trust, efficiency, and growth for all stakeholders.