

Project Title – “Smart Subscription Tracker”

Target Users - Sales Representatives, Support Teams, Managers / Business Owners.

Problem Statement -

Businesses relying on subscriptions face challenges due to the lack of a centralized system:

- Missed renewals lead to revenue loss.
- Sales reps have limited visibility into customers needing follow-up.
- Managers struggle to measure active subscriptions, churn, and revenue trends.

Proposed Solution: Subscription Tracker CRM

A Salesforce-based subscription tracker addresses these issues by:

- Centralizing all subscription records linked to customers.
- Automating reminders for upcoming renewals.
- Updating subscription statuses in real time.
- Providing dashboards for active subscriptions, renewals, and revenue metrics.

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Centralize subscription records in Salesforce (plan, start/end date, status).
- Automate renewal reminders and follow-ups.
- Provide dashboards for churn, renewals, and revenue.
- Track payments and overdue accounts.
- Scalable and user-friendly.

Stakeholder Analysis

Primary Stakeholders (Direct Users)

- Sales Representatives

- Customer Success / Support Teams
- Managers / Business Owner
- Finance / Billing Teams

Business Process Mapping

- Customer record is created (Account/Contact).
- Subscription record is created, linked to customer and plan.
- System activates subscription with start/end dates.
- Renewal reminders are sent automatically before expiry.
- Sales/Support team manages renewals, upgrades, downgrades, or cancellations.
- Finance team updates payment status.
- Dashboards display active subscriptions, churn, and revenue trends.

Use Cases

1. Lead & Customer Management

- Capture customer details via web forms or manual entry.
- Link customers to one or multiple subscriptions.

2. Subscription Management

- Maintain subscription records with start date, end date, plan, and status.
- Auto-update status (Active, Expired, Canceled) based on rules.

3. Renewal Process

- Send automated email/SMS reminders before subscription expiry.
- Assign renewal follow-ups to sales reps.
- Update subscription with renewal confirmation.

4. Payment Tracking

- Record payment status (Paid, Pending, Failed).
- Notify finance teams for overdue payments.

5. Reporting & Dashboards

- Show total active subscriptions and upcoming renewals.

- Track churn rate and subscription revenue by plan.
- Display agent activities (renewal follow-ups, customer communication).

AppExchange Exploration

- Chargent – Payment processing and subscription billing inside Salesforce.
- Zuora for Salesforce – Enterprise-grade subscription billing and revenue management.
- Conga Billing – Automates subscription billing and invoicing workflows.
- Subscription Manager Apps (various SMB tools) – Prebuilt templates to manage recurring services.