Membership & Subscription Manager – Phase 1

Phase 1: Problem Understanding & Industry Analysis

Goal:

Understand what we're building and why. We are building a system to manage members, subscriptions, renewals, and invoices for organizations (like gyms, clubs, or online platforms) efficiently.

Requirement Gathering

Talk to stakeholders (Admin, Members, Finance Team, Customer Support).

Example requirements: - Track all members with membership type and status. - Allow members to subscribe or renew plans. - Send automated renewal reminders. - Generate revenue and subscription reports. - Control access levels based on plan (Basic, Premium, Gold).

Stakeholder Analysis

Role	Responsibility
Admin	Manage system setup, create plans, monitor subscriptions.
Finance Team	Generate invoices, track payments.
Customer Support	Handles member issues, assists with renewals.
Member	View subscription status, renew membership, receive notifications.

Business Process Mapping

Flow: 1. Member selects plan → 2. Admin/Finance records subscription → 3. System calculates expiry date → 4. Renewal reminders sent automatically → 5. Invoice generated → 6. Reports updated for revenue & active subscriptions.

Industry-specific Use Case Analysis

- Membership-based organizations need accurate tracking of active members and revenue.
- Different plans (Basic, Premium, Gold) give different access levels.
- Automated reminders reduce manual effort.

• Reports help management make decisions about plan pricing and promotions.

Existing Solutions / AppExchange Exploration

• Some membership management apps exist on Salesforce AppExchange.
• Our custom solution is simpler, focused on learning Salesforce features: Objects, Flows, Reports, Lightning Pages, and Experience Cloud.