# EV Charging Station CRM – Phase 1: Problem Understanding & Industry Analysis

## 1. Requirement Gathering

To understand the business requirements, discussions would be held with stakeholders such as charging station managers, operators, and customer service representatives.  
  
Example requirements:  
• Track all charging stations and slots with availability status.  
• Allow customers to book charging slots.  
• Prevent overlapping bookings for the same slot.  
• Record payments and generate revenue reports.  
• Log and track breakdowns or maintenance requests.

## 2. Stakeholder Analysis

• Admin – manages Salesforce setup and configurations.  
• Charging Station Operators – create and manage slot bookings.  
• Manager – approves high-value bookings, monitors reports, and oversees operations.  
• Customer Service – handles issues, cancellations, or breakdown reports.  
• Customers – book slots and make payments (future portal/experience site scope).

## 3. Business Process Mapping

Flow of the process:  
Customer requests slot → Operator checks availability → Booking created → Approval (if high value) → Payment logged → Confirmation email sent to customer → Breakdowns/issues reported → Service team notified.

## 4. Industry-Specific Use Case Analysis

In the EV charging industry:  
• Charging slots have limited availability and must be scheduled efficiently.  
• Pricing may vary based on time, location, or type of charger.  
• Breakdowns and maintenance directly affect customer satisfaction.  
• Operators need real-time visibility of utilization and revenue.  
  
Therefore, the CRM must track charging stations, slots, payments, and breakdowns, while automating approvals and customer notifications.

## 5. AppExchange Exploration

A review of Salesforce AppExchange shows some energy and asset management apps. However, a dedicated EV Charging CRM is still evolving. This project aims to build a simplified custom solution tailored to charging station operations, helping to streamline workflows, improve customer experience, and prepare the foundation for future integrations (payment gateways, IoT chargers).