EduConsultPro

A CRM Application to Manage the Services offered by an Institution

Project Description:

This project is focused on streamlining the admission and consultation processes at EduConsultPro Institute, designed to address the challenges of efficiently managing student admissions, inquiries, and expert consulting services. The goal is to deliver a comprehensive solution by leveraging the Salesforce CRM platform to enhance operational efficiency and the user experience for both prospective students and admissions staff. Through this project, we aim to improve data accuracy, ensure a seamless admission process, and support the long-term objectives of EduConsultPro Institute in providing quality education and student services.

Objectives:

Business Goals:
1. **Streamline Admission Process:** Enable EduConsultPro Institute to manage admission applications efficiently, reducing processing time and improving accuracy.
2. **Enhance Student and Staff Experience:** Create a seamless, user-friendly interface for prospective students and admissions staff, reducing the complexity of the application and consulting process.
3. **Improve Data Management and Reporting:** Centralize admission, consulting, and case data within Salesforce CRM to facilitate detailed analysis of trends, performance, and outcomes.

Specific Outcomes:
1. **Admission Application Management:**
   - **Automated Application Capture:** Collect and store comprehensive admission application data, including personal details, academic history, and qualifications, directly in Salesforce CRM.
   - **Automated Notifications:** Generate email confirmations for students upon successful application submission.
2. **Approval Process for Consulting Requests:**
   - **Automated Approval Flow**: Implement a Salesforce-based approval process to streamline consulting requests with automatic submission and email alerts for status updates (approval or rejection).
   - **Email Notifications**: Notify students promptly regarding their consulting

request status.
3. **Consulting Services Management:**
    - **Consulting Request Capture**: Enable students to submit consulting service requests via the website, capturing preferences and expertise areas in Salesforce.
    - **Notification and Scheduling**: Notify consultants of new requests and enable them to manage appointments with scheduling options within Salesforce.
4. **Immigration Case Management:**
    - **Centralized Case Management**: Capture and store immigration case details in Salesforce for easy access and processing by immigration agents.
    - **Automated Alerts and Updates**: Notify agents of new cases and enable real-time updates on case status (e.g., open, in progress, closed)

Salesforce Key Features and Concepts Utilized
- **Centralized Data Management with Salesforce CRM:**
  Unified data storage for admissions, consulting requests, and immigration cases ensures streamlined access and management by EduConsultPro staff.
- **Automation through Screen Flows and Process Builder:**
  Screen flows guide users through admissions and consulting processes, while Process Builder automates approvals and triggers notifications, reducing manual effort.
- **Approval Processes for Consulting Requests:**
  Automated approval routing for consulting requests, including email alerts for students on approval or rejection, simplifies the review and response process.
- **Custom Reporting and Dashboards:**
  Real-time reports and dashboards offer insights into metrics such as application rates and consultant availability, supporting data-driven decisions.

Detailed Steps to Solution Design

1. Requirement Analysis and Stakeholder Meetings

- Gather detailed requirements from EduConsultPro stakeholders to understand the existing challenges in admissions, consulting, and immigration processes.
- Document specific requirements, including data capture, reporting needs, notification flows, and approval conditions.

- Define KPIs (Key Performance Indicators) to measure the success of the implementation, such as reduced processing time, improved response rates, or higher enrollment figures.

2. Define Data Model
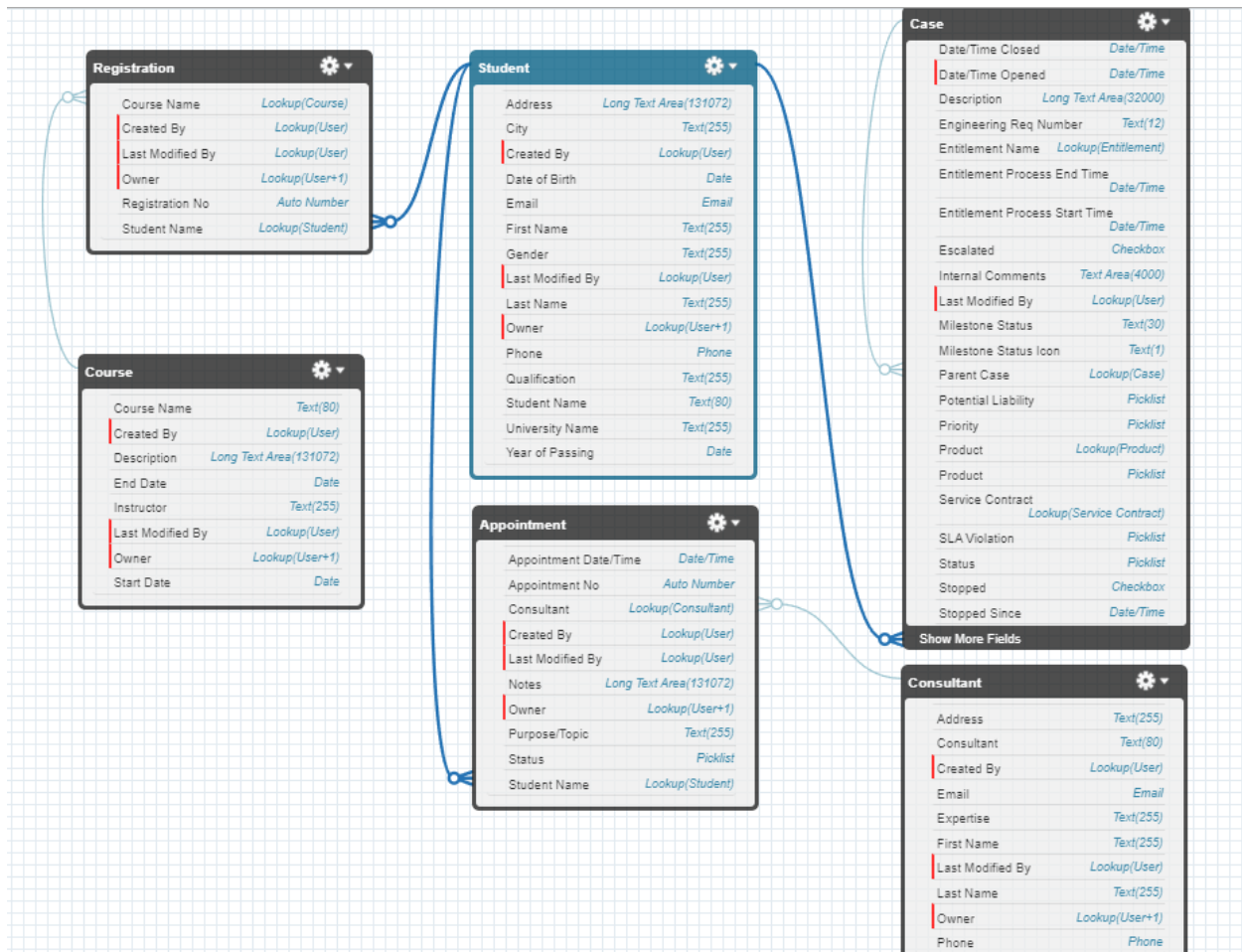
- **Student Object**: Capture basic student details, academic history, contact information, and application status.
- **Appointment Object**: Store appointment information, including program details, status, and appointment date.
- **Consultant Object**: Record consulting preferences, requested expertise, and consultant availability.
- **Case Object**: Track each case with information such as case type, status, assigned agent, and document management.
- **Registration Object:**keep the information of Student and course they registered in.

- **Course Object**:Store information of course such as name, end date and instructor.
- Create necessary relationships (e.g., lookup or master-detail) among objects to link student records with admissions, consulting requests, and immigration cases.

3. Automation Design

- **Screen Flow for Admissions:**
  - Design flows to guide admissions staff through form completion, application review, and status updates.

Flow Builder   EduConsultPro Flow - V1

Select Elements   Auto-Layout

Last saved on 6/11/2024, 02:10 pm   Active   Run   Debug   Save As New Version   Save   Deactivate
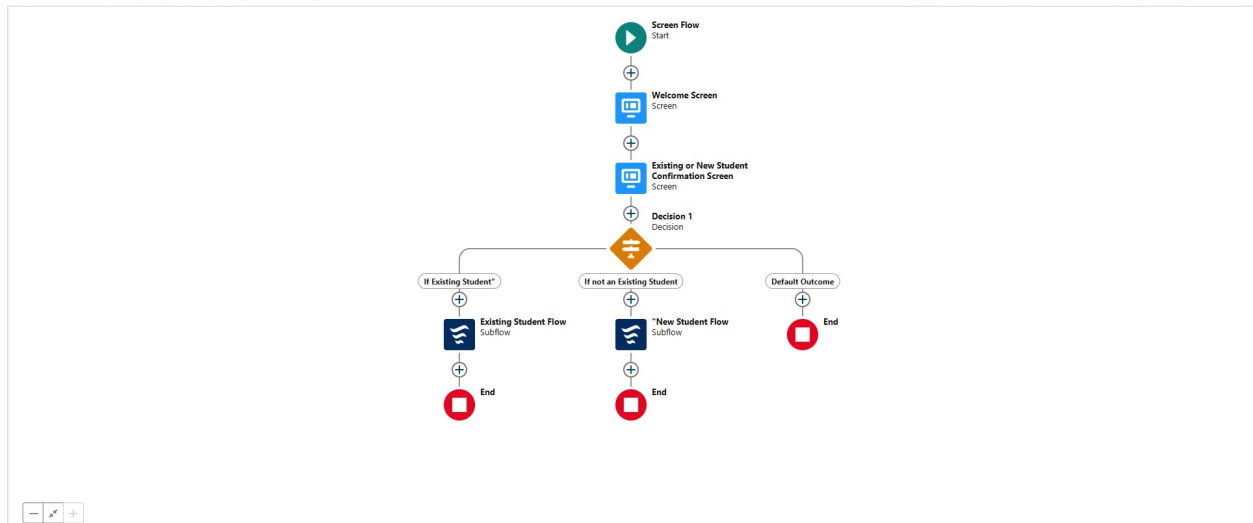
Screen Flow
Start

Welcome Screen
Screen

Existing or New Student
Confirmation Screen
Screen

Decision 1
Decision

If Existing Student"   If not an Existing Student   Default Outcome

Existing Student Flow   "New Student Flow   End
Subflow   Subflow

End   End

Flow Builder   EduConsultPro Student Flow - V4

Select Elements   Auto-Layout

Last saved on 7/11/2024, 10:49 am   Active   Run   Debug   Save As New Version   Save   Deactivate

Screen Flow
Start

Student Info
Screen

Create Student Record
Create Records

Course Screen
Screen

Selecting Course
Decision

Selected IELTS   Selected GRE   Selected GMAT   Selected Duolingo   Selected TOEFL   Default Outcome

Get IELTS Rec   Get GRE Rec   Get GMAT Rec   Get Duolingo Rec   Get TOEFL Rec
Get Records   Get Records   Get Records   Get Records   Get Records

Create IELTS Registration Rec   Create GRE Registration Rec   Create GMAT Registration Rec   Create Duolingo Registration Rec   Create TOEFL Registration Rec
Create Records   Create Records   Create Records   Create Records   Create Records

Send Email to Student
Action

Success Screen
Screen

End

- **Approval Process:**
  - Create a consulting request approval workflow, which routes requests to the appropriate consultant.
  - Configure automated notifications for each approval/rejection action.
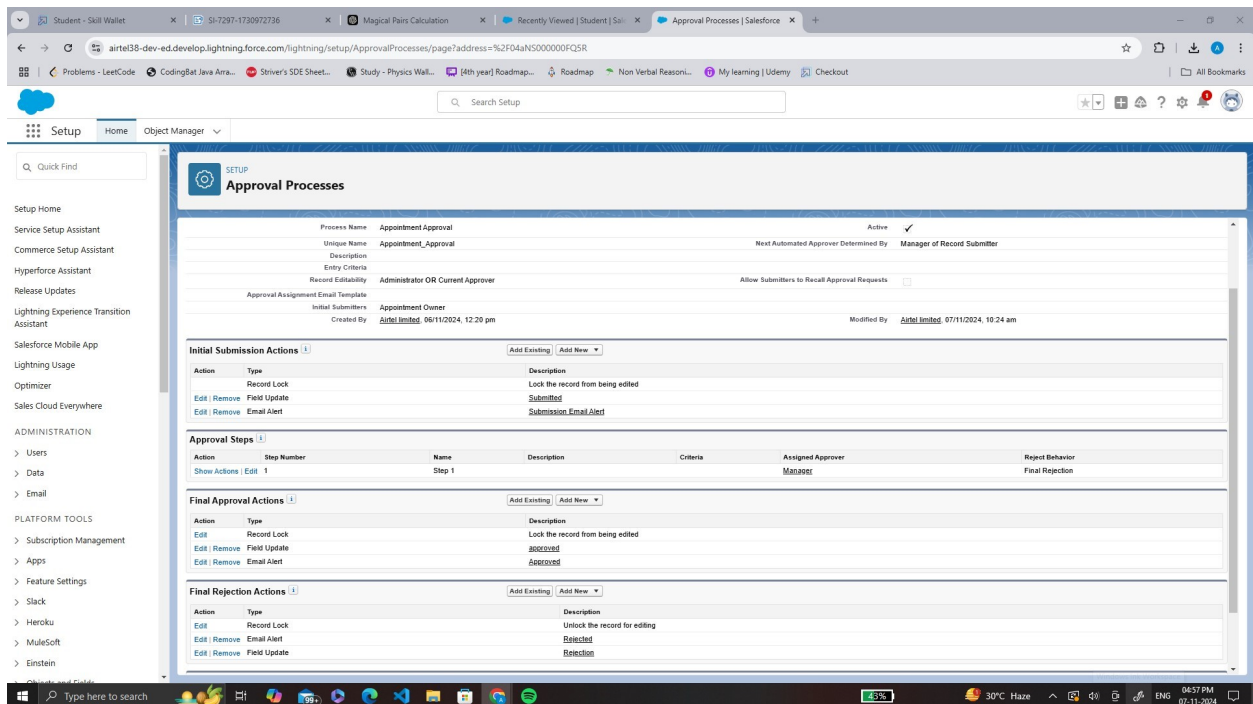
4. Implement User Interface and Experience (UX)

- **Student Portal Integration:**
  - Allow students to submit admissions, consulting, and immigration requests via the institute's portal, integrating forms with Salesforce objects.
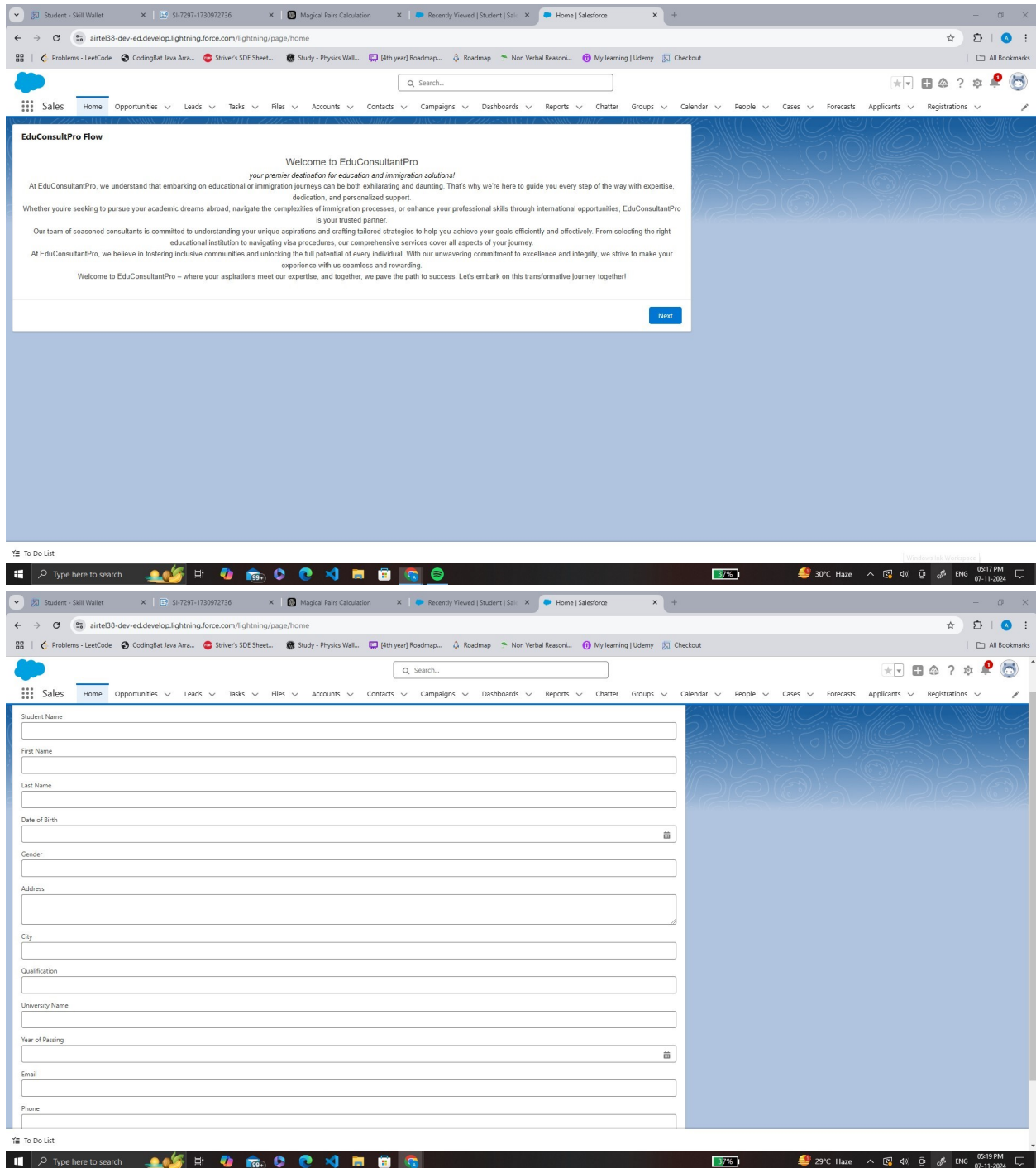
- **Staff Screen Flows:**
  - Design flows within Salesforce for admissions and consulting staff to efficiently manage records and respond to student inquiries.

- **Consultant Interface:**
  - Provide consultants with a clear interface for viewing and managing their consulting appointments, complete with a calendar view for scheduling.

Testing and Validation

Unit Testing

- Objective: Verify individual components (e.g., objects, workflows, and automation rules) function as expected.
- Actions:
  - Test individual record creation, field updates, and object relationships (e.g., linking a Student to an Admission Application).
  - Validate each automation (e.g., Process Builder, Flow, and Approval Processes) triggers accurately with correct conditions and outputs.
  - Confirm that emails, notifications, and alerts are sent as per configured criteria.

Integration Testing

- Objective: Ensure seamless data flow between Salesforce and the external student portal.
- Actions:
  - Test data synchronization to confirm student admissions, consulting, and immigration requests submitted on the portal are correctly captured in Salesforce.
  - Validate API connections for real-time updates between Salesforce and the student portal.
  - Test the accuracy of data mapping, especially for complex fields like consulting preferences and case status.

Functional Testing

- Objective: Verify all functionalities work as specified in the requirements.
- Actions:
  - Test the admissions and consulting flows from end-to-end: submit a form, verify automation, and simulate various approval/rejection conditions.
  - Verify that approval processes (e.g., consulting request approvals) perform correctly, checking the routing to the appropriate consultants.
  - Test field validations, mandatory fields, picklists, and record types to ensure compliance with data input requirements.

Layout and Design Testing

- Objective: Ensure that the interface follows consistent layout, design, and branding guidelines.
- Actions:
    - Verify the alignment, spacing, and overall structure of elements on each screen (e.g., form fields, buttons, navigation).
    - Confirm that components are displayed consistently across different devices and browsers (responsive testing).
    - Check that font sizes, colors, and icons match design specifications for a professional look and feel.

Navigation and Workflow Testing

- Objective: Confirm the ease of navigation through the user flows for admissions, consulting, and case management.
- Actions:
    - Test navigation paths from start to finish, ensuring each action button (e.g., Next, Previous, Submit) leads to the correct screen.
    - Verify breadcrumbs or indicators to show users their current step within multi-step processes, such as application submission.
    - Ensure users can navigate back and forth in forms without losing data unless explicitly required.

Key Scenarios Addressed by Salesforce in the Implementation Project

- **Admission Application Management**: Automating the collection, storage, and processing of admission applications from prospective students. This includes managing application forms, personal details, academic history, and generating

relevant reports.

- **Approval Process for Consulting Requests**: Automating the approval workflow for consulting requests, including email notifications to students, automatic submission of requests, and ensuring timely approvals/rejections by the admissions staff.
- **Consulting Services Management**: Enabling prospective students to request consulting services, capturing preferences and areas of expertise needed, and allowing consultants to manage and schedule appointments efficiently within the Salesforce interface.
- **Immigration Case Management**: Managing immigration-related cases from students, with case submission forms, document storage, automated notifications, and real-time tracking of case statuses. This includes case management and coordination among immigration agents and students.
- **Reporting and Analytics**: Providing real-time insights on application metrics, trends, and performance with dashboards and reports for the admissions team to analyze acceptance rates, processing times, and other key performance indicators (KPIs).

Conclusion

The EduConsultPro Institute project successfully leveraged Salesforce to streamline key processes such as admission application management, consulting services, and immigration case handling. By automating form submissions, approval workflows, and notifications, the project enhanced operational efficiency for both prospective students and staff. The integration of real-time tracking, reporting, and data-driven insights further optimized decision-making. This implementation has transformed the way EduConsultPro manages student inquiries and service requests, providing a seamless, transparent experience while improving internal workflows and overall productivity.