

Phase 1: Problem Understanding & Industry Analysis

■ Project Title

Smart Student Enrollment & Learning Portal – Salesforce CRM for Education

1. Requirement Gathering

- 1 Students face delays in admission updates due to manual follow-ups.
- 2 Institutes struggle with managing inquiries from multiple sources (website, offline, social media).
- 3 No single system to track course enrollment, fee payments, and batch allocations.
- 4 Management lacks real-time reporting on admissions funnel and revenue trends.

2. Stakeholder Analysis

- 1 Students: Need real-time updates on admission status, fees, and schedules.
- 2 Teachers/Faculty: Require batch allocation and course tracking.
- 3 Admission Officers: Want automation for lead follow-ups and application tracking.
- 4 Institute Management: Seeks dashboards for admissions, revenue, and course demand.

3. Business Process Mapping

- 1 Inquiry raised by student → captured as Lead in Salesforce.
- 2 Lead qualification → converted into Student record.
- 3 Course selection → Batch allocation → Fee payment tracking.
- 4 Automated notifications → admission confirmation + reminders.
- 5 Reports & dashboards → provide insights to management.

4. Industry-specific Use Case Analysis (Education CRM)

- 1 Lead Management: Capture student leads from forms, social media, and campaigns.
- 2 Course & Batch Management: Manage course details, allocate students to batches.
- 3 Fee Management: Track payments, due amounts, and reminders.
- 4 Student Engagement: Send automated SMS/email notifications.
- 5 Reporting: Generate dashboards for admissions, fee collection, and student strength.

5. AppExchange Exploration

- 1 Salesforce Education Cloud (Reference Solution): Provides education CRM templates.

- 2 FormAssembly / JotForm Connector: For student inquiry form integration.
- 3 Conga Composer / DocuSign: For generating and signing admission documents.
- 4 SMS Magic / Twilio: For student communication and reminders.