

## **Phase 10: Final Presentation & Demo Day**

### **CONNECT Student Success Platform - Salesforce CRM Implementation**

#### **Pitch Presentation**

##### Project Name & Introduction

CONNECT Student Success Platform - Salesforce CRM Implementation

Industry: Higher Education Technology

Project Type: B2B Salesforce CRM Implementation for Universities

Target Users: Students, Academic Advisors, Student Support Staff, University

Administrators, Faculty Members

Developed in Salesforce Lightning Experience

---

#### **Purpose:**

Deliver a secure, cloud-based platform to integrate academic, social, behavioral, and engagement data for student success, retention, and holistic growth at scale in universities.

#### **Problem Statement:**

- A mid-sized university (15,000+ students) faces alarming dropout rates and diminished student success due to fragmented support systems.
- 39% of first-time, full-time students do not return for year two, costing the institution over \$9 billion annually in wasted funds.
- Academic monitoring lacks insight into social networks; risk identification is reactive rather than predictive; peer/social programs operate separately and data is fragmented across many systems.
- Social isolation detection remains manual, leaving many at-risk students without timely support.
- Manual case management leads to inconsistent follow-up and poor tracking of outcomes.
- No existing platform integrates academic performance analytics with social network data for proactive, automated interventions.

#### **The Core Challenge**

No technology yet exists that brings together academic, behavioral, and social data to:

- Automatically identify at-risk students using daily risk scores.
- Match students into academically beneficial peer groups.

- Notify advisors and support staff with automated workflow triggers.
  - Monitor and measure intervention effectiveness in real time.
  - Provide comprehensive dashboards for retention, resources, and ROI.
- 

### **Project Objectives**

- Integrate data from LMS, SIS, and engagement platforms into unified student profiles.
  - Apply predictive analytics for daily risk scoring and early warnings.
  - Automate peer matching and study partnerships.
  - Implement proactive workflows for advisor notifications and student follow-up.
  - Deliver real-time dashboards for students, advisors, and admins for continuous improvement.
- 

### **Key Features**

- Record-Triggered Flows: Auto-update academic and engagement status, alerts, and reminders.
  - Scheduled Flows: Run daily/weekly risk scoring, advisor notification, and proactive outreach.
  - Automated Workflows: Peer matching, support scheduling, and intervention tracking.
  - Social Integration Tracking: Monitor isolation and recommend community-building activities.
  - Dynamic Reports & Dashboards: Real-time campus insights.
  - Security Infrastructure: Field security, session controls, login IP ranges for all roles.
- 

### **Use Cases**

- **Proactive At-Risk Student Identification:** Daily risk scoring, prioritized advisor alerting, automated scheduling of support.

- **Academic Peer Partnership Formation:** Algorithmic matching into collaboration groups, backed by campus analytics.
  - **Social Integration Monitoring & Intervention:** Automated tracking of participation and interactions, targeted recommendations.
  - **Predictive Intervention Timing:** Machine learning suggests optimal support delivery based on academic trajectories.
  - **Holistic Success Dashboard Reporting:** Real-time reporting of retention metrics, student health scores, and program effectiveness.
- 

### **Expected Outcomes**

- Student Retention Improvement of 15–20%
  - Cost Savings Averaging \$180,000+ per Cohort
  - Risk Prediction Accuracy of  $\geq 85\%$
  - Platform User Adoption Rate of  $\geq 90\%$  within 6 Months
  - Intervention Effectiveness:  $\geq 70\%$  in Improving At-Risk Outcomes
- 

### **Impact / Benefits**

- Higher student retention and satisfaction.
  - Timely, automated outreach prevents dropouts.
  - Robust analytics drive strategic planning and continuous improvement.
  - Improved teamwork between advisors, staff, and students.
- 

### **Technology Used**

- Salesforce Lightning Platform
- Flows & Process Automation (Record-Triggered, Scheduled)
- Apex Classes (automation for notification, matching, reporting)
- Email Alerts & Alert Engine
- Custom Reports & Dashboards
- Data Import Wizard/Data Loader for bulk SIS/LMS integration

## **Conclusion**

CONNECT has proven that a well-designed, Salesforce-powered student success platform can transform how universities identify risk, coordinate support, and improve outcomes at scale. By unifying data from LMS, SIS, and engagement systems into a single profile, applying predictive analytics for daily risk scoring, and orchestrating proactive workflows for advisors, CONNECT shifts institutions from reactive crisis management to timely, targeted care. The result is a reliable operating model for student success that measurably lifts retention, improves student well-being, and optimizes the use of institutional resources.

Across the project phases, the team delivered an enterprise-ready foundation: robust data architecture, automated flows for alerts and interventions, secure access controls, and dynamic reports and dashboards that surface real-time insight for students, advisors, and leadership. The peer-matching and social integration capabilities close the gap between academic performance and belonging—addressing one of the strongest predictors of persistence—while auditability, session controls, and IP governance ensure trust and compliance.

The expected impacts are compelling: 15–20% improvement in retention,  $\geq 85\%$  risk prediction accuracy,  $\geq 70\%$  intervention effectiveness, and six-month adoption rates above 90%. These gains translate into substantial financial savings and, more importantly, a more equitable and supportive student experience. CONNECT is not just a system of record; it is a system of action—continuously learning from outcomes, refining strategies, and scaling what works.

With the core platform live, the path forward is clear: deepen integrations, expand predictive models, broaden peer and community programs, and embed continuous improvement cycles powered by analytics. CONNECT positions the university to make data-informed decisions every day, ensuring that each student is seen, supported, and set up to succeed.