

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.
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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.
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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.
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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.
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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
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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.
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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