**Student Enrollment & Performance CRM**

**Project Phase 1: Problem Understanding & Industry Analysis**

This document presents the **foundational analysis** for the custom **Student Enrollment & Performance CRM** project. It identifies institutional challenges, maps stakeholder needs, and outlines the processes and use cases that will guide Salesforce-based implementation.

**1. Requirement Gathering**

**Problem Statement**  
Most educational institutions rely on **disconnected spreadsheets, emails, and manual paperwork** to manage student admissions, fee tracking, and academic performance. This fragmented approach creates several issues:

* Duplicate student records and missing application data.
* Admission teams spend excessive time chasing incomplete forms.
* Fee reminders are inconsistent, leading to delays in revenue collection.
* Teachers lack a centralized space for attendance & performance tracking.
* Parents have limited visibility into their child’s progress.
* Principals and administrators lack real-time dashboards for decision-making.

**Project Objectives & KPIs**

* Centralize all **student inquiries, applications, and enrollment data** in Salesforce. *(KPI: 90% reduction in duplicate/missing records)*
* Automate **fee reminders & payment tracking** to ensure timely collections. *(KPI: >85% on-time fee payments)*
* Enable **real-time dashboards** for admissions pipeline, fee collection, and student performance. *(KPI: <2 minutes to generate reports vs hours/days previously)*
* Improve **communication between institution, students, and parents** through automated notifications. *(KPI: ≥70% parent engagement rate on portal/alerts)*
* Generate insights for **admissions forecasting & student success**. *(KPI: Predictive reports accuracy within 10% of actuals)*

**2. Stakeholder Analysis**

**Stakeholders & Pain Points**

* **Student** – Wants a clear admission process, access to fee/payment history, and academic progress visibility.
* **Parent** – Wants fee reminders, quick access to student performance, and transparent communication from the institution.
* **Admission Officer** – Struggles with handling hundreds of applications, tracking incomplete submissions, and responding to inquiries in time.
* **Teacher** – Needs an easy way to log attendance, grades, and student feedback without duplicating work.
* **Principal / Administrator** – Needs centralized dashboards to track admissions, financials, and academic health of the institution.

**User Stories** (detailed)

* *As a Student, I want to track my admission status in real-time so I don’t need to call the office repeatedly.*
* *As a Parent, I want automated SMS/email reminders for fee deadlines so I can avoid late penalties.*
* *As an Admission Officer, I want to assign leads to counselors so that inquiries are followed up within 24 hours.*
* *As a Teacher, I want to generate class performance reports instantly so I can share feedback during parent-teacher meetings.*
* *As a Principal, I want a unified dashboard showing admissions pipeline, fee collections, and dropout risk so I can make strategic decisions.*

**3. Business Process Mapping**

**End-to-End Process**

1. **Inquiry Capture** – Leads are generated via website forms, phone calls, campus visits, or education fairs.
   * Student details logged into Salesforce.
   * Automated email/SMS acknowledgment sent.
2. **Application Submission** – Students upload forms & required documents.
   * Salesforce tracks incomplete applications.
   * Admission Officer reviews and updates status (Pending → In Review → Accepted/Rejected).
3. **Enrollment & Course Assignment** – Once accepted, student is enrolled.
   * Fee schedule generated automatically.
   * Student assigned to relevant courses/subjects.
4. **Fee Management** –
   * Automated reminders sent before due dates.
   * Payments recorded; overdue accounts flagged for follow-up.
5. **Academic Tracking** – Teachers log attendance and grades.
   * Assignments, tests, and projects linked to student records.
   * Automated alerts for low attendance or poor performance.
6. **Performance & Reporting** –
   * Parents receive periodic updates.
   * Administrators view dashboards for enrollment trends, financial health, and student outcomes.

**4. Industry-Specific Use Case Analysis**

Education-focused CRM needs special features:

* **Application & Admission Management** – Manage applications, documents, entrance exam results, and acceptance workflow.
* **Fee Tracking & Reminders** – Configurable fee schedules, integration with payment gateways, automated reminders via SMS/email.
* **Attendance & Gradebook** – Teachers can quickly mark attendance, enter marks, and generate progress reports.
* **Parent Communication Portal** – Two-way communication channel for parents to receive notifications, download reports, and track student status.
* **Predictive Analytics & Dropout Prevention** – Identify at-risk students early by analyzing attendance and performance trends.
* **Alumni Engagement (Future Scope)** – Track graduates for future fundraising, mentorship programs, and brand reputation.

**5. AppExchange Exploration**

**Comparative Review**

* **TargetX (Education CRM)**
  + *Pros*: Strong admissions and student lifecycle management.
  + *Cons*: Expensive; heavy customization still needed.
* **SchoolMint**
  + *Pros*: Excellent for K-12 enrollment & communication.
  + *Cons*: Limited higher-education functionality.
* **Salesforce Education Cloud**
  + *Pros*: End-to-end student lifecycle solution; native Salesforce support.
  + *Cons*: Licensing costs; steep learning curve.

**Project Decision**  
While these packaged solutions are robust, the team has chosen a **custom build** using Salesforce’s standard objects (Leads, Opportunities, Contacts) with custom objects for **Admissions, Fees, and Performance**. This approach ensures hands-on learning with Salesforce Admin & Developer skills while validating real-world CRM needs.