

A CRM Application to Manage the Service offered by an Institution

1. Project Overview

This project is focused on CRM application to manage the service offered by an institution, designed to address the institute faces challenges in managing the admission process, student enquiry, and export consulting services efficiency. The goal is to deliver a comprehensive solution by leveraging EduConsultPro Institute decides to leverage Salesforce CRM to streamline the admission process and enhance the overall experience for both students and admissions staff. Through this project, we aim to enhance the student admission process and support the long-term goals of Education institute.

2. Objectives

Business Goals:

- 1. Streamline Admission Process**
- 2. Enhance Student Experience**
- 3. Improve Enquiry Management**
- 4. Optimize Consultant Engagement**

Specific Outcomes:

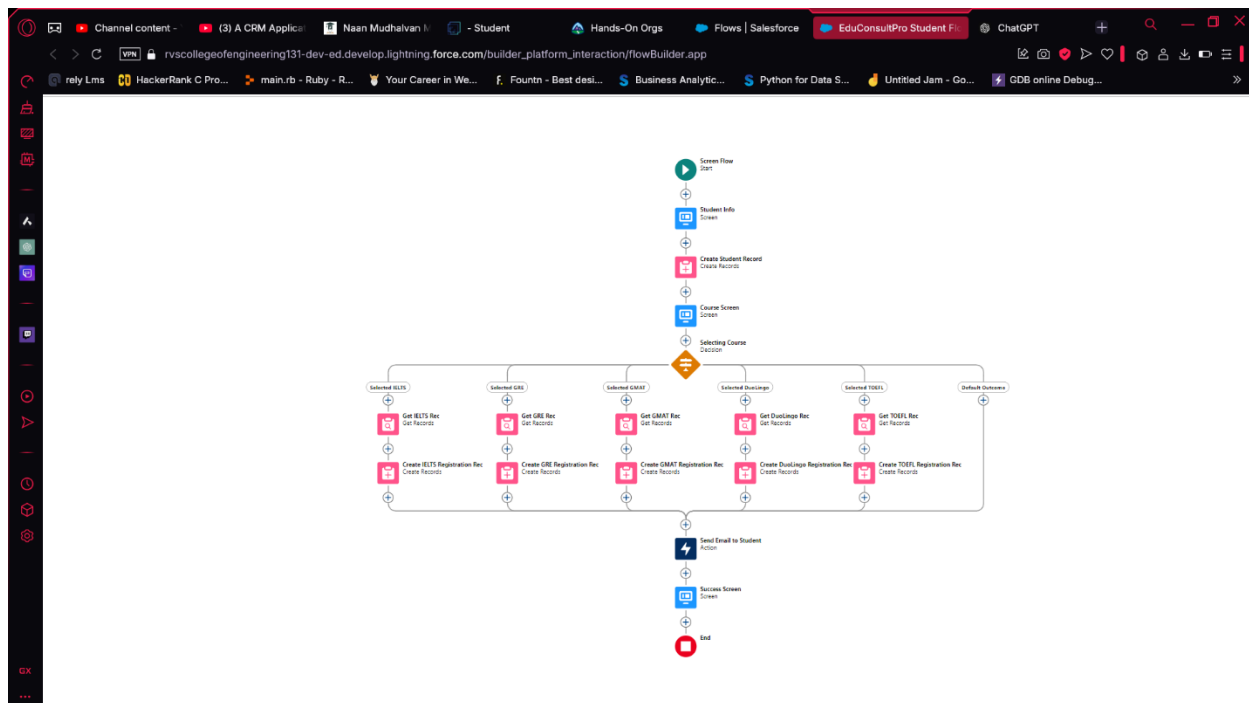
- 1. Efficient Admission Management**
- 2. Improved Student Experience**
- 3. Enhanced Enquiry Handling**
- 4. Optimized Consultant Performance**

3. Salesforce Key Features and Concepts Utilized

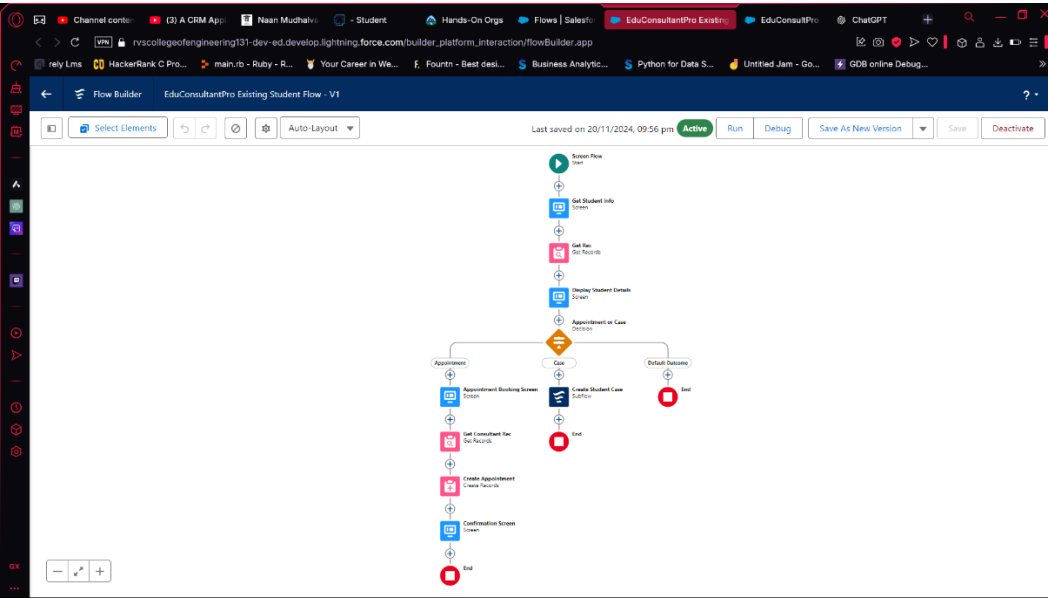
- Admission Management
- Student Enquiry Management
- Online Consultation Integration
- Lead Management

4. Detailed Steps to Solution Design

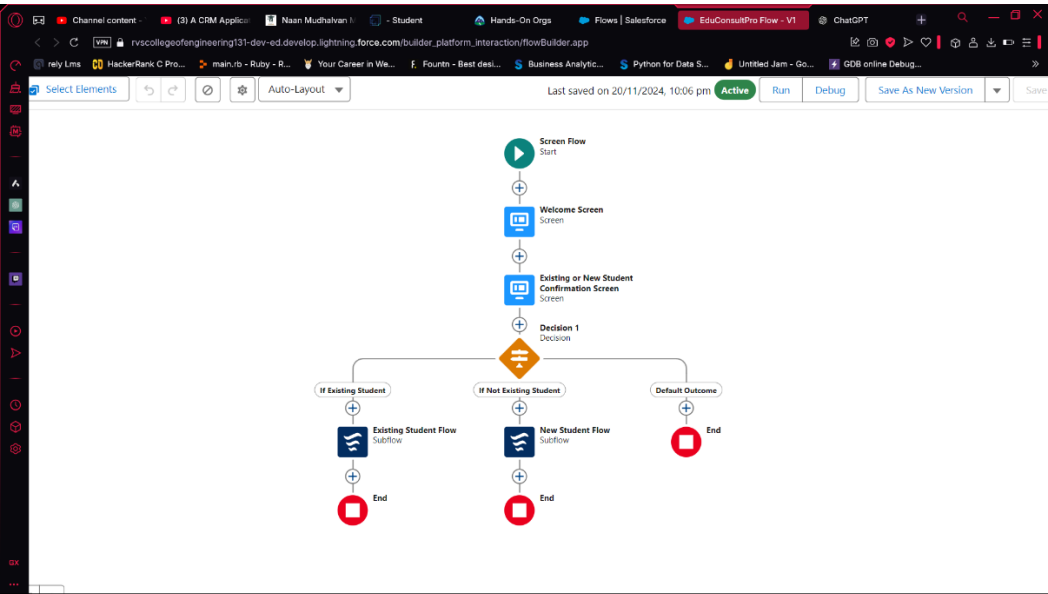
Create a ScreenFlow for Student Admission Application process.



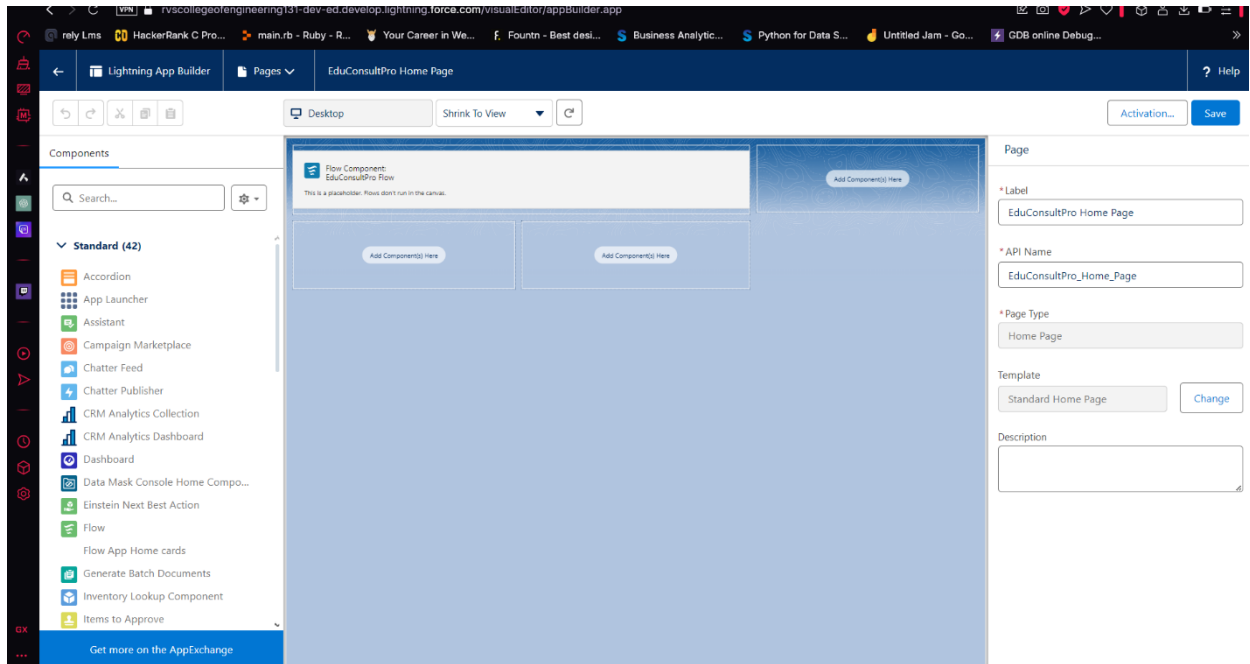
Create a ScreenFlow for Existing Student to Book an Appointment



Create a ScreenFlow to Combine all the flows at one place



Create a lightning app page



5. Testing and Validation

1. Unit Testing

Apex Classes and Triggers

- **Objective:** Verify the functionality of individual methods, classes, and triggers in isolation.
- **Test Coverage:** Ensure at least 75% code coverage for deployment. Strive for 90% or more for critical functionality.

2. User Interface Testing

- **Objective:** Validate the correctness and usability of the Lightning Web Components (LWCs), Visualforce Pages, or other custom UI components.
- **Responsive Design Testing:** Ensure seamless experience on mobile (Salesforce Mobile App) and desktop platforms.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

Salesforce is a powerful CRM platform that helps institutions manage their services efficiently across various use cases. It centralizes customer data, tracks interactions, and streamlines processes like lead management, service scheduling, and case resolution. This ensures better communication, timely support, and enhanced customer satisfaction.

For marketing, Salesforce automates campaigns, personalizes outreach, and collects feedback to improve services. Its reporting tools and AI-driven analytics provide real-time insights and predictions, helping institutions make informed decisions and deliver proactive service.

The platform also integrates seamlessly with other systems, such as ERP or payment gateways, ensuring scalability as the institution grows. Features like community portals and mobile access empower customers with self-service options, while robust security and compliance measures protect sensitive data.

Whether for education, healthcare, or finance, Salesforce adapts to specific needs, enabling institutions to deliver customer-focused, efficient, and secure services.

7. Conclusion

Summary of Achievements: A CRM Application to Manage the Services offered by an Institution built on salesforce enhances the institute faces challenges in managing the admission process, student enquiry, and export consulting services efficiency and enhance the student admission process and support the long-term goals of Education institute. Created an Lightning app page to provide an responsive home page for the application to enhance the user comfortability This scalable and robust system aligns with modern business needs and can adapt to future demands.