



CAMPUS CONNECT CRM

PROJECT DOCUMENTATION

Phase 1: Problem Understanding & Industry Analysis

Objective:

To understand the problems faced by universities in managing student queries and academic records, analyze industry practices, and define the initial direction for the Campus Connect Salesforce implementation.

Tasks Performed:

1. Requirement Gathering

- Collected pain points from students (delayed responses, lack of transparency).
- Gathered feedback from faculty and administration on challenges in query resolution and academic tracking.
- Defined high-level needs: query management, automation, dashboards, and centralized student profiles.

2. Stakeholder Analysis

- Students: Need a simple way to log queries and track progress.
- Faculty: Require visibility into student issues and course-related queries.
- Administration: Need control over non-academic queries (finance, facilities) and overall monitoring.
- IT Team: Responsible for CRM setup, automation, and maintenance.

3. Business Process Mapping

- Current flow: Student → Email/Form → Manual forwarding → Faculty/Admin → Delayed resolution.
- Desired flow: Student → Salesforce Query → Auto Assignment → Faculty/Admin → Real-time Tracking via Dashboards.

4. Industry-Specific Use Case Analysis

- Benchmarked existing university CRM practices.
- Identified common patterns: centralized query desks, case tracking, and mobile-first approaches.

- Highlighted Salesforce advantages: automation, scalability, and analytics.

5. AppExchange Exploration

- Explored education-related Salesforce solutions on AppExchange.
- Examples: Salesforce Education Cloud, Student Success Hub.
- Found reusable patterns like case management templates and student lifecycle apps.

✓ Functional Requirements:

1. Centralized query logging system.
2. Automated assignment of queries to departments (Academic, Finance, Administration).
3. Student profile with basic details (Name, Email, Enrollment, Course mapping).
4. Dashboards for:
 - Students (query status)
 - Faculty (open/resolved queries)
 - Admin (overall query analytics).

🔒 Non-Functional Requirements:

1. **Performance:** Query creation should take less than 3 seconds.
2. **Security:** Student data must be restricted to authorized users only.
3. **Scalability:** Should handle queries from 10,000+ students.
4. **Usability:** Mobile-friendly UI (for students on smartphones).

📊 Use Case Diagram:

