

Project Title: *Institute Management System (IMS)*

- **Industry:** Education
 - **Project Type:** B2C Salesforce CRM Implementation
 - **Target Users:** Institute Administrators, Admission Officers, Faculty Members, Students, and Parents
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Problem Statement

An educational institute receives hundreds of student inquiries via its website, offline walk-ins, and social media. However:

- Lead follow-up is slow and inconsistent
- Student records are tracked manually in spreadsheets
- Faculty allocation is done without balancing workloads
- Fee collection and tracking are fragmented
- Management lacks real-time dashboards for admissions, revenue, and faculty performance

□ To address these challenges, the institute wants to implement a **Salesforce CRM (IMS)** to:

- Automate lead capture and admission qualification
 - Manage student profiles, faculty details, courses, and batches
 - Track fee payments and send automated reminders
 - Provide real-time dashboards for admissions, faculty utilization, and revenue
 - Improve student/parent communication through SMS/Email alerts
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Use Cases

Lead Management

- Automatically capture leads from website forms, social channels, and walk-ins
- Assign leads to admission officers based on course/territory
- Qualify leads using interest scores

Student Management

- Maintain student profiles with academic history, enrolled courses, and status.
- Convert qualified leads into student records.

Faculty Management

- Maintain faculty profiles with specialization and availability
- Assign faculty to courses/batches and track workload.

Course & Batch Scheduling

- Schedule lectures, exams, and institute events
- Send SMS/Email reminders to students and faculty

Fee Management

- Record payments, track pending dues, and generate receipts
- Send automated reminders for pending fees

Reporting

- Dashboards for admissions funnel, monthly revenue, and faculty utilization
- Reports for student trends, counselor performance, and fee collection