**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

**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

**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