SALESFORCE PROJECT

Problem Statement: EdTech Pvt. Ltd. is receiving a high volume of leads from multiple channels such as the website, online ads, and webinars. However, the sales team faces several challenges:

- Lead Management Issues: Difficulty in qualifying leads and assigning them to the right sales representatives.
- Tracking Gaps: No streamlined way to track demo sessions, course enrollments, and payments.
- Lack of Visibility: Sales managers struggle to monitor the sales pipeline, agent performance, and revenue growth.
- Manual Processes: Lead follow-ups and approval processes are handled manually, leading to delays and missed opportunities.

Solution: To address these challenges, a Salesforce-based Customer Relationship & Sales Automation System is implemented with the following features:

1. Automated Lead Management
    - Capture leads directly from the website and marketing channels.
    - Auto-assign leads to the right sales reps based on source.
2. Course & Demo Tracking
    - Custom objects for *Courses, Demo Sessions, and Enrollments*.
    - Automated scheduling and notifications for demo sessions.
3. Sales Process Automation
    - Validation rules, flows, and approval processes to ensure data quality and faster decision-making.
    - Auto-create enrollment records when opportunities are closed as "Won".
4. Manager Visibility & Reporting
    - Dashboards for sales funnel, revenue by course, and top-performing reps.
    - Reports on leads, opportunities, demo attendance, and payments.
5. Customer Support & Integration
    - Email-to-Case for handling support queries.
    - Optional payment gateway integration to track real-time payment status.

Phases:

Phase 1: Problem Understanding & Industry Analysis

- Gather requirements from Sales & Support teams.
- Analyze pain points: lead qualification, follow-ups, enrollment tracking.
- Map current business process (Lead → Demo → Enrollment).
- Research EdTech-specific use cases.

Phase 2: Org Setup & Configuration

- Setup company profile (EdTech Pvt. Ltd.).
- Define business hours (for demo sessions).
- Create Users: Sales Executive, Manager, Support.
- Configure Roles & Profiles with correct access.
- Apply Organization-Wide Defaults (OWD) & Sharing Rules.

Phase 3: Data Modeling & Relationships

- Standard Objects: **Lead, Opportunity, Account, Contact**.
- Custom Objects: **Course, Demo Session, Enrollment**.
- Relationships:
    - Lead → Demo Session.
    - Opportunity → Enrollment.
    - Contact → Enrollment → Course.
- Use Schema Builder to visualize model.

Phase 4: Process Automation (Admin)

- Validation Rule: Opportunity Amount > 0.
- Flows:
    - Auto-assign Website leads to Web Sales Rep.
    - Send notification when Demo is scheduled.
- Approval Process: High-value enrollments (> ₹50,000).

Phase 5: Apex Programming (Developer)

- Trigger: Auto-create Enrollment on Opportunity Closed Won.
- Apex Class: Suggest top 3 courses by Lead interest.
- Write Test Classes for code coverage.

Phase 6: User Interface Development

- Lightning App: *EdTech CRM*.
- Tabs: Leads, Opportunities, Courses, Demo Sessions, Enrollments.
- LWC: *Upcoming Demo Sessions This Week*.
- Utility Bar: Quick Lead Capture.

Phase 7: Integration & External Access

- Web-to-Lead Form for website inquiries.
- Email-to-Case for support queries.
- Optional Payment Gateway integration for Enrollment status updates.

Phase 8: Data Management & Deployment

- Import Leads & Courses via Data Import Wizard.
- Data backup/export.
- Deployment with Change Sets / SFDX.

Phase 9: Reporting, Dashboards & Security Review

- Reports: Leads by Source, Demo Attendance, Revenue by Course.
- Dashboards: Sales Funnel, Top Sales Reps, Monthly Revenue.
- Security: Restrict student record access, ensure Manager visibility.

Phase 10: Final Presentation & Demo Day

- End-to-end demo: Website Lead → Assignment → Demo → Enrollment → Dashboard.
- Pitch: "Our EdTech CRM automates lead capture, demo scheduling, and course enrollment while providing real-time sales insights."
- Collect feedback and prepare documentation for showcase.