SALESFORCE PROJECT PHASE 1

📌 Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- Discussions with Sales Executives to understand lead capture issues.
- Input from Sales Managers about lack of visibility on pipeline & performance.
- Input from Support Agents on challenges handling student queries and cases.
- Key requirement: A system to automate lead management, track demo sessions, manage enrollments, and provide real-time dashboards.

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2. Pain Point Analysis

- Lead Qualification Issues: Leads from multiple channels (Website, Ads, Webinars) not prioritized properly.
- Follow-up Delays: Manual reminders → missed opportunities.
- Enrollment Tracking: No central system to track demo attendance, enrollments, and payments.
- Manager Visibility: Sales Managers cannot see performance metrics or revenue trends clearly.

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3. Business Process Mapping (As-Is)

Current student journey in EdTech company:

1. Student fills inquiry form (Website/Ad/Webinar).
2. Lead manually assigned to a sales rep.
3. Sales rep contacts the student → schedules a demo.
4. If interested, student enrolls manually → payment tracked separately.
5. No real-time reporting available for Managers.

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4. EdTech Industry-Specific Use Case Research

- Lead Management: EdTech companies need to capture and qualify leads quickly to avoid losing students to competitors.
- Demo Sessions: Free trial/demo classes are a key driver for conversions in EdTech. Tracking attendance is critical.
- Course Management: Need for a structured catalog of courses (AI, ML, Cloud, etc.) linked to enrollments.
- Enrollment & Payment Tracking: Automating enrollment creation and payment status improves efficiency.
- Dashboards: Revenue by course, sales funnel (Lead → Demo → Enrollment), and top-performing sales reps help management decisions.