

Student Success Plan (SSP) Navigator

Phase 1: Problem Understanding & Industry Analysis

1. Introduction & Problem Statement

1.1 Project Vision

To create a unified and proactive academic support platform on Salesforce that empowers university advisors to identify at-risk students early, manage personalized success plans, and coordinate intervention efforts across campus, ultimately boosting student retention and graduation rates.

1.2 Problem Statement

Universities struggle with student attrition due to a lack of coordinated, proactive systems for identifying and supporting at-risk students. Key information signaling a student is struggling (poor attendance, low grades, lack of engagement) is often siloed in disparate systems or not captured at all. This leads to reactive interventions, a lack of coordination between support staff, and an inability to scale support resources effectively to those who need them most.

2. Project Goals & Scope

2.1 Project Goals

- **Increase Student Retention:** Proactively identify and support at-risk students to reduce dropout rates.
- **Improve Advisor Efficiency:** Automate administrative tasks and provide a 360-degree student view to allow advisors to focus on high-value interactions.
- **Enhance Cross-Campus Collaboration:** Create a single source of truth for all staff involved in a student's support network.
- **Enable Data-Driven Decisions:** Provide administrators with actionable dashboards to measure the effectiveness of student success initiatives.

2.2 Scope

In Scope (Minimum Viable Product):

- A centralized data model for Students, Success Plans, Goals, and Interactions.
- An automated "Early Alert" system triggered by faculty.
- Automated task reminders for advisor follow-ups.
- A custom "Student 360" Lightning Web Component for advisors.
- Dashboards for Advisors and Administrators.

Out of Scope (Future Enhancements):

- External-facing portal for students to view their own success plans.
- Direct integration with the university's Learning Management System (LMS).
- Mobile app notifications for students.

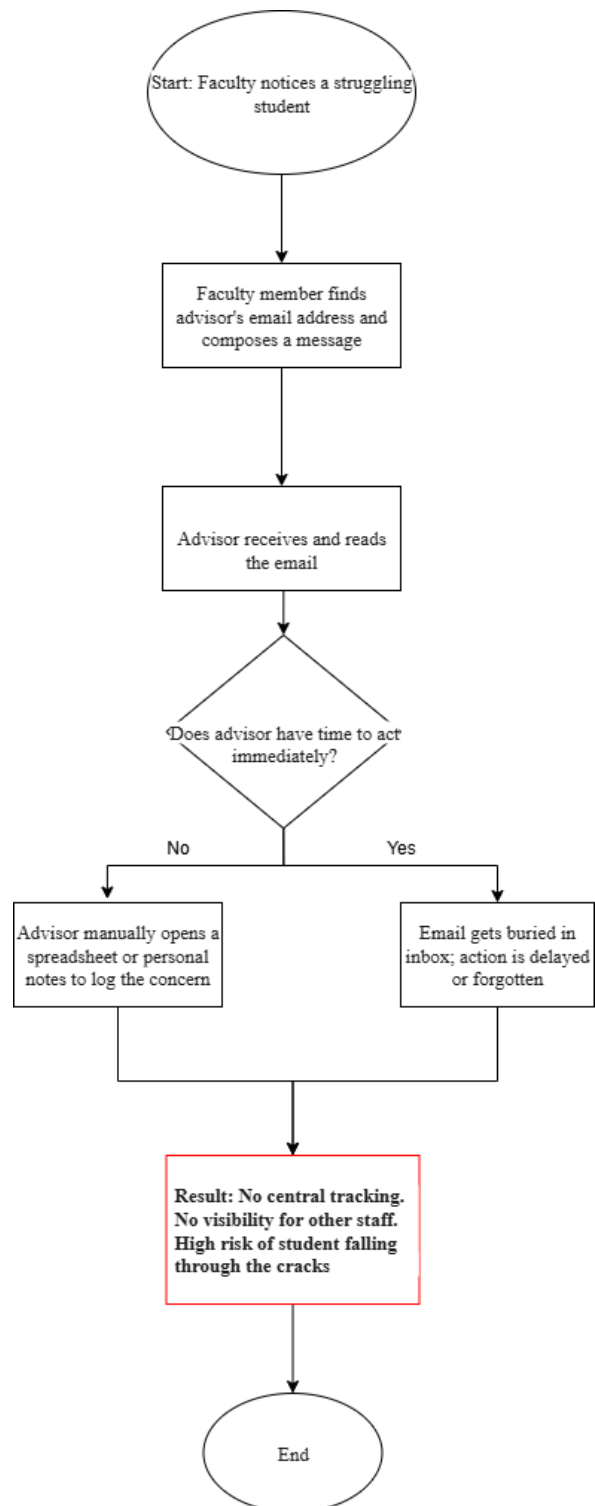
3. Stakeholder Analysis

Persona / Role	Key Needs & Motivations	Role in SSP Navigator System
Academic Advisor	A single view of their students, automated reminders, efficient note-taking.	Primary User. Creates/manages SSPs, logs interactions, tracks goals.
Faculty Member	A quick and simple way to flag a student who is struggling in their class.	Initiator. Creates "Academic Alerts" to trigger the SSP process.
Dean / Administrator	High-level data on retention trends, effectiveness of support programs, and resource use.	Executive User. Views dashboards and reports to make strategic decisions.

4. Business Process Mapping

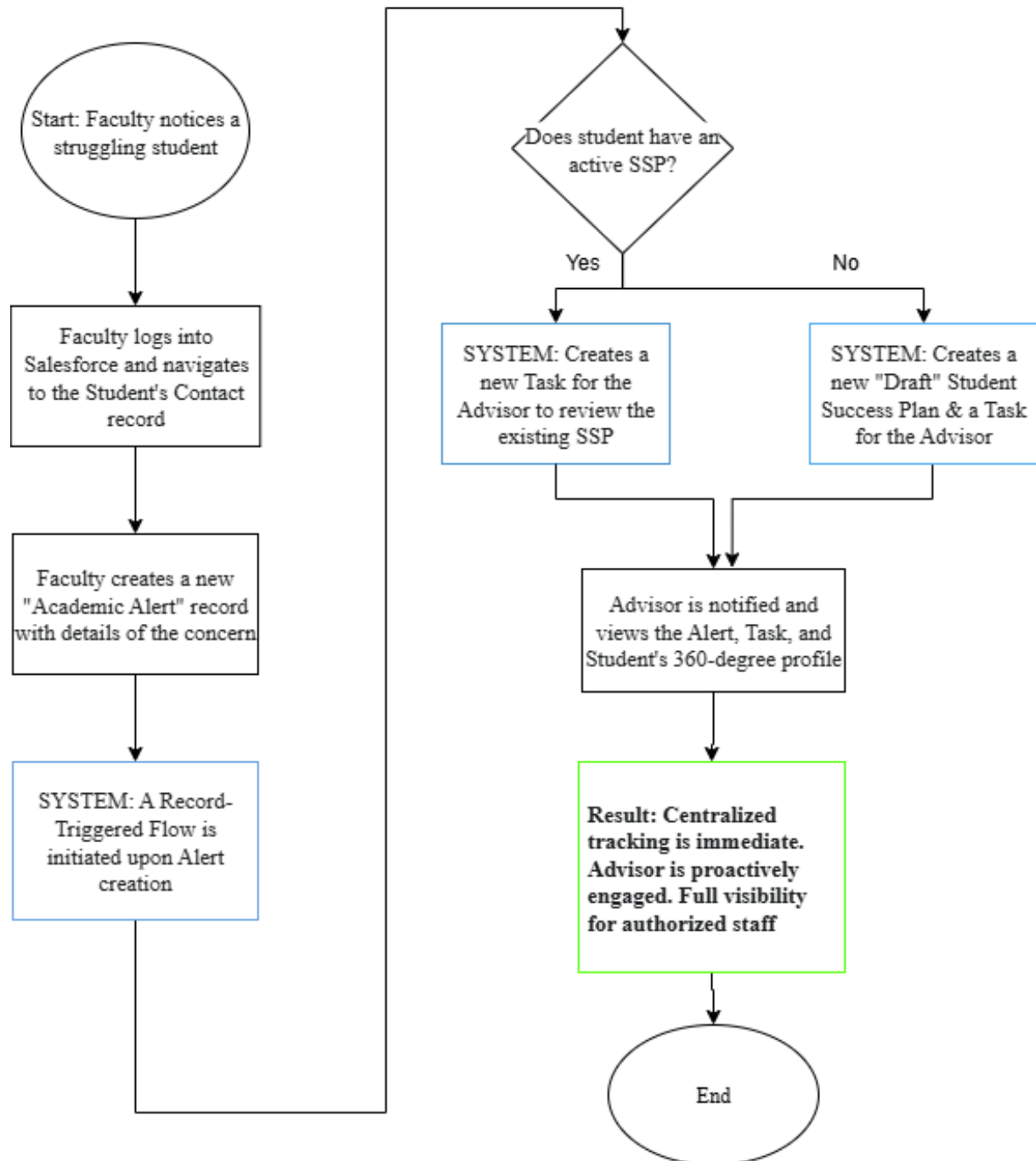
4.1 As-Is (Current) Process

The current process is manual and disconnected. A faculty member typically emails an advisor about a struggling student. The advisor then tracks this information in a personal spreadsheet or email folder. There is no central tracking, no automated follow-up, and no visibility for university leadership.



4.2 To-Be (Future) Process

The new process will be streamlined and automated within Salesforce. A faculty member will submit a formal "Academic Alert." This action will automatically notify the correct advisor and prompt the creation of a Student Success Plan, all of which is tracked centrally and is visible to relevant stakeholders.



5. Industry-specific Use Case Analysis

The SSP Navigator application will support the following core use cases for the higher education industry:

- **Use Case 1: Early Alert & Triage**
 - A faculty member identifies a student missing assignments and creates an "Academic Alert" in Salesforce.
 - The system automatically assigns the alert to the student's primary advisor and notifies them.
 - The advisor reviews the alert within the context of the student's full profile to determine the severity and next steps.
- **Use Case 2: Centralized Success Plan Management**
 - The advisor creates a formal Student Success Plan (SSP) linked to the student's record.
 - The advisor defines specific, actionable "Intervention Goals" within the SSP, such as "Attend weekly writing center tutoring."
 - Each goal can be assigned to a specific owner (e.g., the tutoring center staff) and has a target date.
- **Use Case 3: Coordinated Interaction & Progress Tracking**
 - Every interaction (advising meeting, tutoring session) is logged against the SSP, creating a running history of support.
 - Automated reminders ensure that goal owners follow up with the student at scheduled intervals.
 - The advisor can track the status of all goals in one place, providing a holistic view of the student's progress.

6. AppExchange Exploration

A review of the AppExchange shows that Salesforce offers the **Education Cloud** with a product called **Student Success Hub** (formerly Advisor Link). This is a comprehensive, enterprise-level solution for student support.

Justification for Custom Build:

- **Learning & Demonstration:** For the purpose of the TCS Last Mile program, building a custom solution from the ground up demonstrates a deep understanding of core Salesforce platform capabilities (data modeling, automation, LWC).

- **Tailored MVP:** Our custom "SSP Navigator" will be a lightweight, highly tailored solution focused specifically on the MVP requirements defined in this document, avoiding the complexity of a full enterprise product.
- **Cost-Effectiveness:** A custom build avoids the significant licensing costs associated with managed packages like the Student Success Hub, which is a realistic consideration for smaller institutions.