

Student Success Hub - College Application & Mentorship System

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand the requirements, users, and workflows of the Student Success Hub and plan the Salesforce implementation that will later support applications, mentorship sessions, and reporting.

1. Requirement Gathering

- **Talk to Stakeholders:**

- **Program Administrator:** Manages students, mentors, applications, sessions, and reports.
- **Mentors:** Volunteer guidance providers; schedule sessions and track student progress.
- **Students:** High school participants submitting college applications.

- **Example Requirements:**

- Track all students with details like name, high school, GPA, and assigned mentor.
- Track all mentors and link them to multiple students.
- Track each college application for a student with the target university and application status.
- Log mentorship sessions with date, time, and notes.
- Avoid errors in application submission (e.g., ensure essays are completed before marking as submitted).
- Generate reports and dashboards showing student progress, mentor sessions, and application statistics.

2. Stakeholder Analysis

- **Program Administrator:** Set up the system, assign mentors, track applications, and generate reports
- **Mentor:** Guide students, schedule, and log mentorship sessions
- **Student:** Submit applications, attend sessions, track progress

3. Business Process Mapping

- **Student Application & Mentorship Flow:**
 - Student creates or updates college applications.
 - Program Administrator assigns a mentor.
 - Mentor schedules and conducts mentorship sessions.
 - Progress is tracked (essays completed, applications submitted).
 - Administrators generate reports to monitor overall program progress.

4. Industry-Specific Use Case Analysis

- **Non-profit education:**
 - Difficulty tracking multiple students and mentors.
 - Limited real-time visibility into application status.
 - Challenges in managing mentorship schedules efficiently.
- **Salesforce app requirements:**
 - Centralized student and mentor database.
 - Application and session tracking with validation rules.
 - Reporting and dashboards for monitoring metrics.

5. AppExchange Exploration

- Research existing apps for student or mentorship tracking.
- Many exist but are generic or complex.
- The project will build a custom, simpler solution tailored for Future Scholars, which provides learning in Salesforce setup, data modeling, and basic automation.

6. Additional Insights for Phase 1

- Define custom objects and fields: student, Mentor, Application, Mentorship Session.
- Plan relationships (Master-Detail and Lookup).
- Prepare sample data for testing workflows.
- Plan validation rules and picklist values for later automation.
- Identify basic reporting needs and metrics for dashboards.