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

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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

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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

1. Maintain student profiles with academic history, enrolled courses, and status.
2. Convert qualified leads into student records.

Faculty Management

1. Maintain faculty profiles with specialization and availability
2. Assign faculty to courses/batches and track workload.

Course & Batch Scheduling

1. Schedule lectures, exams, and institute events
2. Send SMS/Email reminders to students and faculty

Fee Management

1. Record payments, track pending dues, and generate receipts
2. Send automated reminders for pending fees

Reporting

1. Dashboards for admissions funnel, monthly revenue, and faculty utilization
2. Reports for student trends, counselor performance, and fee collection

Additional Features

• Library Management: Track issued/returned books, maintain digital catalog, and send due date alerts.
• Hostel Management: Allocate rooms, monitor availability, and manage fee collection.
• Placement Management: Record student placements, track recruiter interactions, and generate placement statistics.

Benefits of the System

The implementation of Salesforce CRM in institutes not only digitizes routine processes but also improves operational efficiency. By centralizing student and faculty data, management gains better visibility into performance metrics. Automated communication ensures parents and students remain informed, while real-time dashboards support strategic decision-making. Overall, the

system reduces manual workload, minimizes errors, and enhances the overall experience for administrators, faculty, and students.