Problem Statement:

Institute Management System

Educational institutes handle a large number of inquiries through their website, direct walk-ins, and social media channels. Despite this, they face several issues:

- Lead follow-ups are irregular and often delayed
- Student information is managed manually in spreadsheets
- Faculty assignments lack workload balance
- Fee collection and monitoring are fragmented
- Management does not have access to real-time analytics for admissions, revenue, or faculty performance

👉 To address these pain points, the institute plans to roll out Salesforce CRM (IMS) to:

- Automate inquiry capture and admission qualification
- Centralize student records, faculty details, courses, and batch management
- Simplify fee tracking with reminders and receipts
- Deliver real-time dashboards for admissions, finance, and faculty utilization
- Strengthen communication with students and parents via SMS/Email notification.

Core Use Cases:

1. Lead Management:

- Capture leads automatically from website forms, walk-ins, and social channels
- Route leads to admission officers based on course or geography
- Evaluate and score leads by interest levels

2. Student Management:

- Maintain detailed student profiles including history, enrolled programs, and status
- Convert qualified leads into enrolled student records

3. Faculty Management:

- Maintain faculty profiles with expertise, skills, and availability
- Assign faculty to batches/courses while balancing workloads

4. Course & Batch Scheduling:

- Plan lectures, exams, and institutional events
- Trigger SMS/Email reminders for students and faculty

5. Fee Management:

- Record payments, track dues, and generate fee receipts
- Send automated reminders for pending balances

6. Reporting & Analytics:

- Dashboards for admission funnel, revenue insights, and faculty workload
- Reports on enrolment patterns, counsellor performance, and fee collection status