EduConnect: Intelligent Student Success & Alumni Engagement Platform

Phase 1: Problem Understanding & Industry Analysis

1.Requirement Gathering

1.1 Primary Stakeholder Interviews

Conduct structured interviews with:

Academic Leadership (2-3 interviews)

- University President/Dean

- Academic Vice President

- Registrar

1.2 Student & Alumni Surveys

- Create online surveys to gather quantitative data:

- Current Student Survey (Target: 500+ responses)

1.3 Document Current Processes

Create detailed process maps for:

- Student Enrolment and onboarding
- Academic advising workflow
- Career Counselling process
- Event planning and management
- Alumni outreach and communication
- Donation collection and acknowledgment

2. Stakeholder Analysis

2.1 Stakeholder Mapping Matrix

Stakeholder Group	Power Level	Interest Level	Influence Strategy	Primary Concerns
University President	High	High	Partner	ROI, Institutional Reputation
Academic Deans	High	High	Partner	Student Success, Faculty Adoption
IT Director	High	Medium	Collaborate	Security, Integration, Maintenance
Faculty	Medium	Low	Inform	Minimal disruption, Easy adoption
Students	Low	High	Consult	User experience, Privacy
Alumni	Low	Medium	Inform	Value-added services, Privacy
Staff (Admin/Support)	Medium	High	Collaborate	Ease of use, Training

3. Business Process Mapping

3.1 Current State Process Maps

- Create detailed flowcharts for:

- Student Risk Identification (Current State)

- Alumni Engagement (Current State)

3.2 Future State Process Design

- Design optimized processes using Salesforce capabilities:

- Student Risk Identification (Future State)

3.3 Process Improvement Opportunities

Identify and prioritize:

- Elimination of manual data entry
- Automation of routine communications
- Real-time reporting and dashboards

4. Industry-specific Use Case Analysis

4.1 Higher Education Industry Research

Analyze industry trends and challenges:

Current Industry Statistics:

- 40% of students don't graduate within 6 years
- Alumni giving rates have declined 20% in the past decade
- 73% of students report feeling disconnected from career services
- Average student-to-advisor ratio is 300:1

Technology Adoption Trends:

- 85% of universities are investing in student success platforms
- Predictive analytics adoption growing 40% annually
- Mobile-first student experiences becoming standard
- Integration with social media for alumni engagement

4.2 Best Practices Identification

Document proven strategies:

- Start with high-impact, low-complexity use cases
- Invest heavily in user training and adoption
- Establish data governance policies early
- Create feedback loops for continuous improvement
- Measure and communicate success stories

5. AppExchange Exploration

5.1 Relevant AppExchange Solutions Research

Student Success Category:

EAB Navigate: Student success and retention platform

- Features: Early alert system, case management, analytics
- Cost: $15-25 per student annually
- Integration: Native Salesforce app

- Civitas Learning: Predictive analytics for student success
  - Features: Risk modeling, intervention recommendations
  - Cost: Custom pricing based on student population
  - Integration: API-based integration
  -

Fundraising & Alumni Engagement:

- Blackbaud Raiser's Edge NXT: Comprehensive fundraising platform
  - Features: Donor management, campaign tracking, event management
  - Cost: $3,000-15,000 annually
  - Integration: Third-party connector available

- CampusLogic: Financial aid and student financial wellness
  - Features: Document collection, loan counseling, financial literacy
  - Cost: $8-12 per student annually
  - Integration: Custom API integration required

Phase 2: Org Setup & Configuration

1. Salesforce Edition Selection & Justification

1.1 Recommended Edition: Enterprise Edition

Justification:

- Advanced Workflow & Process Builder: Required for complex student intervention workflows
- Advanced Sharing & Security: Need granular control for FERPA compliance
- API Access: Essential for LMS, SIS, and payment gateway integrations
- Custom Report Types: Required for complex academic reporting
- Sandboxes: Critical for testing academic year transitions
- Storage: 1GB base + 20MB per user (sufficient for 25,000+ students)

2. Company Profile Setup

2.1 Organization Information

Navigate to: Setup → Company Information → Company Information

2.2 Critical Settings Configuration

Default Language: English **Default Locale:** English (United States)
Default Time Zone: America/New_York (adjust based on university location)

3. Business Hours & Holiday Configuration

3.1 Academic Calendar Business Hours

Setup Path: Setup → Business Hours → New Business Hours

Academic Support Hours (Primary):
Emergency Support Hours:
Career Services Hours:

3.2 Holiday Configuration

Setup Path: Setup → Business Hours → Holidays**

Academic Year Holidays 2024-2025**:**

4. Fiscal Year Settings

4.1 University Fiscal Year Setup

Path: Setup → Company Information → Fiscal Year

Impact on EduConnect:

- Financial aid disbursement tracking
- Alumni giving campaign periods
- Academic performance reporting cycles
- Budget planning and forecasting

5. User Setup & License Management

5.1 User Categories & License Assignment

Administrative Users (Enterprise Licenses):

Academic Staff (Enterprise Licenses):
Faculty (Platform Licenses):
Support Staff (Enterprise Licenses):

5.2 User Management Best Practices

Security Requirements:

- Password complexity: 8+ characters with mixed case, numbers, symbols
- Password expiration: 90 days
- Login hours: Restricted to business hours (except emergency support)
- Two-factor authentication: Required for all administrative users

User Lifecycle Management:

- New employee onboarding workflow
- Role change approval process
- User deactivation for departing employees
- Regular access review (quarterly)

6. Profile Configuration

6.1 Standard Profile Modifications

System Administrator Profile:

- Reserved for IT team only (5 users maximum)
- Full access to all objects and system functions
- No restrictions on login hours or IP ranges

6.2 Custom Profile Creation

Profile 1: University Executive

Profile 2: Academic Advisor
Profile 3: Career Services Counselor
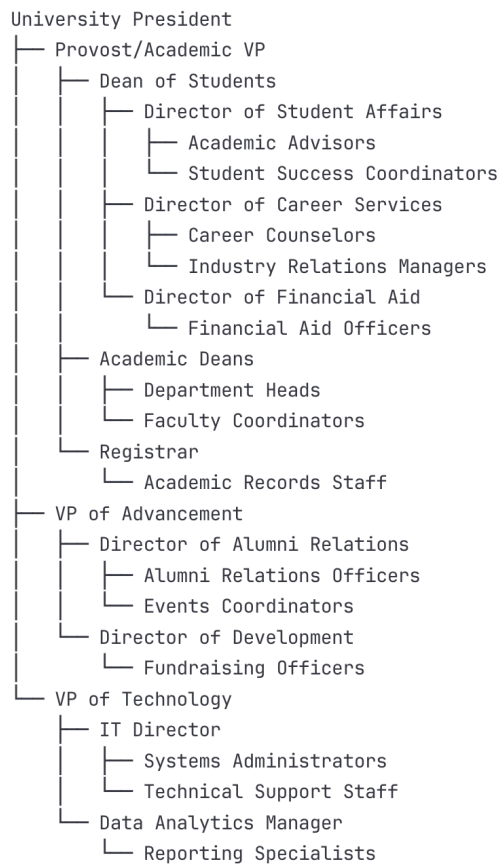Profile 4: Alumni Relations Officer
Profile 5: Faculty Coordinator

6.3 Permission Set Strategy

Why Permission Sets for EduConnect:

- Flexible access management across departments
- Temporary access grants (e.g., during registration periods)
- Cross-functional project access
- Compliance with principle of least privilege

7. Role Hierarchy Configuration

7.1 EduConnect Role Hierarchy Design

```
University President
├── Provost/Academic VP
│   ├── Dean of Students
│   │   ├── Director of Student Affairs
│   │   │   ├── Academic Advisors
│   │   │   └── Student Success Coordinators
│   │   ├── Director of Career Services
│   │   │   ├── Career Counselors
│   │   │   └── Industry Relations Managers
│   │   └── Director of Financial Aid
│   │       └── Financial Aid Officers
│   ├── Academic Deans
│   │   ├── Department Heads
│   │   └── Faculty Coordinators
│   └── Registrar
│       └── Academic Records Staff
├── VP of Advancement
│   ├── Director of Alumni Relations
│   │   ├── Alumni Relations Officers
│   │   └── Events Coordinators
│   └── Director of Development
│       └── Fundraising Officers
└── VP of Technology
    ├── IT Director
    │   ├── Systems Administrators
    │   └── Technical Support Staff
    └── Data Analytics Manager
        └── Reporting Specialists
```

8. Organization-Wide Defaults (OWD)

8.1 Security Model Strategy

EduConnect follows a "Restrictive by Default" approach due to FERPA requirements:

9. Sharing Rules Configuration

9.1 Criteria-Based Sharing Rules

Rule 1: Student Academic Support Sharing

Rule 2: Alumni by Graduation Year
Rule 3: Career Services by Program

9.2 Owner-Based Sharing Rules

Rule 1: Cross-Department Case Collaboration

9.3 Public Groups Configuration

Public Group: Academic Support Team

Public Group: Alumni Engagement Team

10. Login Access Policies

10.1 IP Range Restrictions

Administrative Users:

General Users:

10.2 Login Hours Configuration

Academic Support Hours (Profile-based):

Administrative Hours:

11. Development Environment Setup

11.1 Sandbox Strategy

Full Copy Sandbox (Production Mirror):

Partial Copy Sandbox (Development):
Developer Pro Sandbox (Individual Development):

12. Change Set and Deployment Preparation

12.1 Deployment Strategy

Release Management:

- **Major Releases**: Beginning and end of each semester
- **Minor Releases**: Monthly during semester
- **Hotfixes**: As needed with proper approval