EduTrack CRM – Phase 1: Problem Understanding & Industry Analysis

Goal: Understand what we’re building and why.

1. Requirement Gathering
- Capture student inquiries (web forms, walk-ins, calls).
- Assign inquiries to admission officers.
- Schedule and manage counseling sessions.
- Track enrollments and payment status.
- Generate admissions dashboards.

2. Stakeholder Analysis
- Admin (you): Manages Salesforce setup.
- Admission Officers: Handle leads, counseling sessions, and enrollments.
- Management: Reviews admissions progress with dashboards.
- Students (Prospects): Inquiry initiators (simulated in CRM).

3. Business Process Mapping
Flow: Student Inquiry → Auto-assigned to Admission Officer → Counseling Scheduled → Enrollment Created → Payment Tracked → Reports Generated.

4. Industry-specific Use Case Analysis
In education, institutions must efficiently manage leads, reduce delays in admissions, and improve conversion rates. Tracking inquiries manually causes missed opportunities.

5. AppExchange Exploration
There are education CRM apps (like Education Cloud), but we’ll build our own lightweight EduTrack CRM to learn.