Online Course Management CRM

# Phase 1: Problem Understanding & Industry Analysis

Abstract Regarding my project Idea: I am aiming to build a Salesforce project called Online Course Enrollment Manager CRM. The idea is to help small training institutes manage their students better and their processes easier ,like they can handle inquiries, enrollments, fees, and track how students are progressing in live classes.

In my project, whenever a student shows interest, I will consider it as a Lead. If the student joins, that Lead will be converted into an Enrollment, linked to a Course and a specific Class Session (batch). For every enrollment, Progress records will be created for tracking the student’s progress in each module. Trainers can update this progress, while Salesforce automation will send reminders for payments, classes, or if the student is falling behind.

* Requirement Gathering

1. Capture **student inquiries** (Leads).
2. Manage **Courses** (name, duration, fees, modules).
3. Manage **Trainer** Assignments to courses.
4. Run multiple **batches** for the same course.
5. Track **Enrollments** → each student joins a course session.
6. Monitor **Student Progress** → completion of modules.
7. Handle different student start times in the same course.
8. Automate **reminders** (fees due, missed classes, progress alerts).
9. Provide **dashboards** for enrollments, revenue, popular courses, dropout risk.

* Stakeholder Analysis

1. **Institute Owner/Admin** → needs a business overview: revenue, enrollments per course, dropout risks.
2. **Admission/Support Staff** → capture student leads, convert to enrollments, manage fees.
3. **Trainers/Faculty** → teach sessions, update student module progress, track attendance.
4. **Students** → inquire, enroll, attend sessions, receive automated reminders.

* Business Process Mapping

**Student Enquiry** (Lead Creation) 🡪**Qualify the Lead** (by checking on some parameters like did he attend the demo session etc.,)🡪**Lead Conversion** (when the student enrolls a particular course)🡪**Automate the Progress Records** (Generate the course modules progress records for the student)🡪**Trainer Updates the Progress of course** (upto which topic he had completed the course)🡪**Automate the Live session emails** 🡪**Generate dashboards and Reports for Admin Overview.**

* Industry-specific Use Case Analysis
* **Problem in Education Sector:** Training institutes find it hard to keep track of students joining at different times, leading to poor follow-ups, missed payments, and unnecessary student dropouts.
* Salesforce CRM Solution:
  1. Organize Courses → Run multiple Class Sessions/batches per Course.
  2. Capture & convert Leads into Enrollments.
  3. Track student-level Progress regardless of when they joined.
  4. Automate communication and reminders.
* Expected Benefits:
  1. No potential Lead will be missed.
  2. Clear view of active batches, students, and revenue.
  3. Improved student retention with timely reminders and personalized guidance based on performance tracking.
* AppExchange Exploration