School/College Student CRM

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Functional Requirements:
- Manage student information including personal details and parent/guardian information.
- Support admissions workflow (application submission, status tracking, confirmation).
- Manage courses, classes, and faculty assignments.
- Allow students to enroll in multiple courses through an enrollment process.
- Record grades, exam results, and automatically calculate GPA.
- Manage fee details including fee type, due dates, status (Paid/Pending).
- Generate reports and dashboards on admissions, course enrollments, fees, and student performance.
- Provide a Parent Portal for parents to access student progress and fee status.
- Automate key processes such as fee reminders, admission confirmations, and GPA updates.

Non-Functional Requirements:
- User-friendly interface for administrators, teachers, and parents.
- Secure access with role-based permissions and parent/student logins.
- Scalable solution capable of handling a large number of student records.
- Mobile-friendly accessibility for on-the-go usage.

2. Stakeholder Analysis

- Students: End users whose information, courses, and performance are tracked.
- Parents: Require visibility into student progress, attendance, and fee status.
- Teachers/Faculty: Responsible for updating student grades, attendance, and class schedules.
- Administration/Admission Office: Manage admissions, maintain student records, and monitor academic progress.
- Finance Department: Oversee fee payments, identify pending dues, and manage financial reporting.
- School/College Management: Require consolidated dashboards and insights for decision-making.

3. Business Process Mapping

Current Scenario (Manual or Legacy System):
- Admissions are processed through paper-based forms.
- Fee reminders and notifications are manually handled.
- Grades and results are stored in spreadsheets or separate systems.
- Parents must contact the institution directly for updates.

Proposed Scenario (Salesforce CRM):
- Online admission form submission creates a student record automatically.
- Admission confirmation emails are sent through automated workflows.
- Parent Portal provides real-time access to student data, grades, and fees.
- Scheduled fee reminders sent automatically via email or SMS.
- Reports and dashboards provide real-time insights into admissions, finances, and academic performance.

4. Industry-Specific Use Case Analysis

The education industry increasingly adopts CRM solutions to enhance efficiency and engagement.

- Digital Transformation: Institutions are moving towards digital-first systems to replace manual processes.
- Parental Engagement: Parents expect timely and accurate information on student progress.
- Financial Automation: Automated fee reminders and collection systems reduce late payments.
- Student Performance Tracking: Early identification of at-risk students through academic data.
- Compliance and Security: Institutions require secure systems that comply with data protection standards.

Salesforce's Education Cloud is widely used for these purposes, but a tailored CRM can address institution-specific requirements.

5. AppExchange Exploration

Several solutions on Salesforce AppExchange provide features relevant to education:

1. Salesforce Education Cloud: Comprehensive solution for admissions, student success, and alumni relations.
2. TargetX Recruitment Manager: Focused on student recruitment and admission processes.
3. Blackthorn Events: Useful for managing academic events and scheduling.
4. Fonteva Student Portal: Ready-made student and parent community solution for engagement.

These solutions serve as reference points for designing and extending the custom CRM system.

Phase 1 Outcome

- Requirements documented and categorized into functional and non-functional needs.
- Stakeholders identified with their respective roles and expectations.
- Existing manual processes mapped against proposed automated processes in Salesforce.
- Industry trends and education-specific use cases reviewed.
- AppExchange solutions evaluated for potential integration or inspiration.