

# **Phase 1: Problem Understanding & Industry Analysis**

## **Title :- EdTech Student Success & Retention Platform using Salesforce CRM**

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### **1. The Core Problem**

Colleges today are under pressure to keep students engaged, successful, and career-ready. But most institutions still run on manual processes, disconnected systems, and reactive support. This creates several problems:

- **Students** feel lost. They don't always know how they are performing, miss important updates, and rarely get personalized career advice.
- **Faculty** can't easily track every student's progress. They only notice issues when it's too late, which means struggling students slip through the cracks.
- **Career counselors** don't have the full picture of a student's skills, interests, or academic history. So their guidance is often generic rather than personalized.
- **Administrators** lack real-time dashboards or analytics. They often rely on old reports that don't capture current problems like rising dropouts or declining placement rates.

The result? Higher dropout rates, stagnant academic performance, frustrated students, and weaker placement outcomes.

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### **2. Why Salesforce?**

Salesforce Education Cloud can change this because it's built to connect people, data, and processes in one single system. Here's why it's the right fit:

- **All-in-one system:** Every student's data (grades, attendance, activities, placement progress) lives in one place.
- **Automation:** The system can send reminders, raise alerts, and calculate risk scores without manual work.
- **Early intervention:** Faculty get automatic warnings when a student's attendance or GPA drops, so they can step in early.
- **Personalization:** Each student gets a "360-degree profile" with insights, recommendations, and career guidance that matches their progress.
- **Integrations:** It connects with LinkedIn for career paths, Learning Management Systems (LMS) for academic updates, and SMS/Email gateways for communication.
- **Dashboards:** Admins get clear, real-time reports on dropout trends, placement rates, and performance metrics.

Instead of reacting after problems happen, Salesforce enables **proactive student success management**.

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### 3. Stakeholders and Their Needs

Stakeholder	Their Challenge	What Salesforce Delivers
Students	Confused about grades, attendance, career direction	Student portal showing progress, alerts, and career advice
Faculty	Hard to track at-risk students early	Automated alerts + dashboards to monitor performance
Career Counselors	Limited data about student skills & opportunities	Student profiles + LinkedIn/job market integration
Administrators	No clear view of retention, dropout %, placements	Real-time dashboards with key metrics

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### 4. Key Results We Want to Improve

Right now, most colleges face these numbers:

- **Dropout Rate:** Around 18–25% of students leave before completing.
- **Attendance:** Usually stuck between 60–70%.
- **GPA Trends:** Many students' GPAs are stagnant or declining.
- **Placements:** Only 50–60% of graduates land jobs quickly.

**Our goals with Salesforce:**

- Reduce dropouts to **10% or lower**.
  - Push attendance to **85% or higher**.
  - Improve GPA trends across the board (average +0.5 grade increase).
  - Increase placement success to **80% or more**.
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### 5. Industry Insights – What Others Have Achieved

Salesforce Education Cloud isn't new. Universities worldwide already use it successfully:

- **Arizona State University (USA)** used Salesforce to introduce early-warning alerts. Their retention improved by **15%**.
- **University of Massachusetts (USA)** integrated advising and LMS systems. Their advisors became **30% more efficient**, handling more students with better outcomes.
- **Indian Universities:** Most use basic ERP or LMS tools, but these only store records — they don't predict risks or connect students to careers. This leaves a big gap that Salesforce can fill.

These examples prove Salesforce can transform how institutions manage student success.

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## 6. How the Process Works

### Today's Reality (Manual + Reactive):

1. Student attends class → attendance noted manually.
2. Grades are updated but often not shared quickly with students.
3. No early warnings if a student is falling behind.
4. Faculty notices problems only after exams or repeated absences.
5. Career guidance happens late and is not customized.
6. Admins only see problems after dropout rates rise.

### With Salesforce (Automated + Proactive):

1. Student attends class → attendance and grades updated in Salesforce instantly.
  2. The system calculates a “risk score” for each student (based on attendance, grades, activity).
  3. If risk is high → an automatic alert is sent to faculty.
  4. Faculty connects with the student, and career counselors step in with personalized advice.
  5. Placement dashboards are updated as students progress toward jobs.
  6. Admins see live dashboards of retention, GPA, attendance, and placement — and can make changes in real time.
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## 7. What We've Achieved in Phase 1

By the end of Phase 1, we have:

- A clear **statement of the problem** colleges face.
- A strong **case for why Salesforce Education Cloud is the solution**.
- A mapping of **stakeholders, their challenges, and how Salesforce helps**.
- Defined **KPIs** (dropout %, attendance, GPA, placement) with baseline and target values.
- Real-world **examples of universities** using Salesforce successfully.
- A clear **before-and-after process flow** showing the transformation.