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## Phase 1: Problem Understanding & Industry Analysis

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### Overview

The first phase establishes a foundation by clearly understanding the problem, identifying stakeholders, analyzing the alumni relations and engagement domain, and mapping existing business processes. This helps ensure the AlumniConnect CRM solution aligns with real-world university and NGO needs for alumni tracking, fundraising, and engagement.

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### Activities Done

#### 1. Requirement Gathering

- Conducted discussions with hypothetical stakeholders such as Alumni Officers, Fundraising Coordinators, and Event Managers.
- Identified the following requirements:
  - Centralized alumni profile management (contact details, graduation year, degree, employment history).
  - Fundraising campaign lifecycle management (pledges, donations, acknowledgements).
  - Event management for reunions, networking mixers, webinars, and workshops.
  - Automated reminders and personalized communication (thank-you notes, event invites).
  - Engagement activity tracking (volunteering, mentorship, event attendance, donations).
  - Reporting and dashboards for fundraising progress, alumni engagement trends, and top donors.

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#### 2. Stakeholder Analysis

- **Alumni Relations Officer** – End user managing alumni records and ensuring updated contact information.
  - **Fundraising Coordinator** – Manages donation campaigns and requires real-time insights into pledge fulfillment.
  - **Event Manager** – Organizes alumni events and tracks participation.
  - **University/NGO Management** – Requires executive dashboards with KPIs on alumni engagement, funds raised, and participation levels.
  - **Alumni** – Receive communications, attend events, and contribute donations or volunteer services.
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### 3. Business Process Mapping

- **Current:** Alumni information scattered across spreadsheets, email lists, and manual records.
  - **Issues:**
    - Duplicate entries and missing contact updates.
    - No central system for donation cycle tracking.
    - Event attendance not tied to alumni profiles.
    - Lack of automated reminders → missed opportunities for engagement.
  - **Future with Salesforce CRM:**
    - Unified alumni database.
    - Automated donation acknowledgements and event reminders.
    - Transparent, real-time reporting on engagement and fundraising.
    - Improved donor and event participation tracking.
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### 4. Industry-Specific Use Case Analysis

- Benchmarked against alumni management platforms like **Fonteva Alumni Cloud**, **Blackbaud CRM**, and university portals.
  - Observed gaps that AlumniConnect can solve:
    - Personalized engagement scoring to measure alumni activity.
    - Integration of fundraising + event + alumni database in a single system.
    - Automated recognition of high-value donors and active alumni.
    - Real-time dashboards for university management and fundraising officers.
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### 5. AppExchange Exploration

- Evaluated relevant Salesforce add-ons for potential use:
    - **Event Management Apps** → to manage registrations and RSVPs.
    - **Payment Gateway Integrations** → to support donation processing.
    - **Survey Apps** → to collect feedback after events.
    - **Marketing Enhancements** → to automate alumni outreach campaigns.
  - Decided to build a **custom Salesforce solution** leveraging standard objects (Campaigns, Opportunities) and custom objects (Alumnus, Engagement, Event Participation) to suit the project's unique needs.
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