

# Education Credentials – Salesforce Credential & Scholarship Manager

## Phase 1: Problem Understanding & Industry Analysis

### ■ Goal:

Education Credentials aims to modernize the education sector by using Salesforce CRM to manage digital credentials and scholarships. The system addresses issues of credential authenticity, manual verification, scholarship delays, and data fragmentation while ensuring transparency, automation, and secure record keeping.

### 1. Requirement Gathering

- Universities should be able to issue digital, securely verifiable credentials.
- Recruiters need instant, tamper-proof verification of credentials.
- Students must access credentials and scholarship disbursement status easily.
- Financial institutions require automated, milestone-based fund disbursement.
- Institutions should have dashboards for monitoring academic and financial data.

### 2. Stakeholder Analysis

- Students: Require secure, instant access to academic records and scholarships.
- Recruiters/Employers: Need fast and reliable credential verification.
- Universities/Institutions: Aim to reduce forgery, errors, and administrative workload.
- Financial Institutions: Seek automated, transparent scholarship disbursements.

### 3. Business Process Mapping

- Credential Lifecycle: University issues credential → Credential stored in Salesforce → Student accesses it instantly → Recruiter verifies authenticity online.
- Scholarship Lifecycle: Student applies for scholarship → Application approved → Funds disbursed automatically based on milestones → Transparent status updates available.

### 4. Industry-Specific Use Case Analysis

- Fake certificates are widespread, reducing institutional credibility.
- Manual verification is slow, resource-intensive, and error prone.
- Scholarship fraud and delays harm student trust and satisfaction.
- Fragmented data systems hinder insights and performance analysis.
- Salesforce CRM ensures secure credential management, automation, and transparency.

### 5. AppExchange Exploration (or similar marketplace)

- Explore existing credential and scholarship management products on AppExchange.

- Identify feature gaps (verification speed, automation, dashboards).
- Benchmark pricing, reporting, and usability for future integration.

## **Conclusion**

Existing EdTech and credential management solutions can be analyzed, but Education Credentials focuses on a tailored Salesforce CRM powered system that directly addresses industry needs like credential authenticity, automation, and transparent scholarship disbursement.