Salesforce Project Documentation

Project Title: CampusConnect – Student Attendance & Engagement Hub
Industry: Higher Education
Project Type: B2C Salesforce CRM Implementation
Target Users: Teachers, Administrators, and Students

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

To understand the pain points and expectations, requirement gathering sessions were conducted with **faculty members, administrators, and students**. Key findings:

- **Faculty:**

    - Current manual process of attendance is **time-consuming**.

    - No easy way to **send alerts** when students have low attendance.

    - Difficult to maintain engagement records for events.

- **Administrators:**

    - Require **centralized dashboards** to monitor attendance trends across departments.

    - Need real-time data to take action on **low-performing or irregular students**.

    - Lack of automated reports makes **decision-making slow**.

- **Students:**

    - No transparency in viewing attendance percentage.

    - Limited access to participation history in events/workshops.

    - Often unaware of **attendance shortages until it's too late**.

Conclusion: The college needs a **centralized Salesforce-based CRM** for attendance tracking, alerts, engagement monitoring, and analytics.

2. Stakeholder Analysis

Stakeholder	Needs/Expectations	Salesforce Solution
Faculty	Quick & simple attendance marking, automated alerts	Screen Flow for daily attendance, record-triggered flow for alerts
Administrators	Dashboards for attendance & engagement trends	Custom reports and dashboards
Students	Transparency in attendance & event participation	Student portal/view with real-time data

3. Business Process Mapping

As-Is Process (Current Manual System):

- Attendance is recorded in registers/Excel.

- Consolidation happens monthly → leads to **errors & delays**.

- Event participation is **not systematically recorded**.

- Alerts/notifications depend on faculty remembering to inform students.

To-Be Process (Proposed Salesforce System):

- Faculty use a **Lightning App / Flow** to mark daily attendance.

- **Automated alerts (Email/SMS)** triggered when attendance < 75%.

- Event participation recorded in **Event__c object**.

- **Real-time dashboards** for administrators to track attendance and student engagement.

4. Industry-Specific Use Case Analysis

- Many universities rely on **manual systems**, which often fail to scale.

- Global trend → adoption of **CRM-based Education Management Systems**.

- Salesforce Education Cloud provides a solid base, but **CampusConnect will extend it** with:

  - **Attendance tracking with automation**

    ○ **Student engagement monitoring**

    ○ **Event participation analytics**

    ○ **Real-time dashboards for decision-making**

This makes the solution **unique** compared to existing CRMs that focus only on admissions or academic records.

5. AppExchange Exploration

To enhance the project, relevant AppExchange tools were explored:

- **Document Management Apps** → for uploading student records, ID proofs, and certificates.

- **Email/SMS Integration Apps** → for automated communication with students and parents regarding attendance.

- **LMS Connectors** → to sync data with Learning Management Systems for courses and assignments.

Only cost-effective and education-specific apps will be shortlisted during implementation.