

# Project -Student Management CRM

## Phase 1 — Problem Understanding & Industry Analysis

### 1. Project Overview

**Project Title:** Student Management CRM

**Industry:** Education (EdTech / Educational Institution Management)

**Project Type:** CRM System Development

**Target Users:**

- **Primary Users:** Students, Teachers, Administrative Staff
- **Secondary Users:** Parents, Academic Coordinators, Management
- **Beneficiaries:** Entire educational institution ecosystem (students, faculty, staff, parents)

### 2. Problem Statement

Educational institutions face major inefficiencies in managing student data due to manual processes. Paper-based and spreadsheet methods cause inaccurate records, missed attendance and fee tracking, poor communication, and delays in performance analysis. A centralized Student Management CRM is needed to streamline operations, automate tasks, and improve overall institutional efficiency.

**Student Management CRM** on Salesforce will serve as a **centralized platform** to:

- Maintain accurate student records in real time
- Automate attendance, fee reminders, and performance reports
- Enable role-based access to sensitive data
- Provide dashboards for proactive decision-making
- Improve communication between students, parents, and administrators

### 3. Requirement Gathering

Requirements were identified by analyzing the needs of **students, teachers, and administration staff**:

**Students:**

- Access to attendance records
- View fee status and pay online
- View exam schedules, grades, and progress reports

**Teachers:**

- Attendance marking and reporting
- Grade entry and performance tracking
- Communication with students and parents

**Administration:**

- Centralized student database
- Automated fee collection and reminders
- Generate academic reports and compliance documentation
- Role-based access control

## **4. Stakeholders**

**Internal Stakeholders:**

- School/College Administration
- Academic Coordinators
- Teachers / Faculty
- IT Support Team

**External Stakeholders:**

- Students
- Parents / Guardians
- Education Board / Affiliation Authorities

**Beneficiaries:**

- Improved productivity for staff
- Better academic tracking for students
- Timely updates for parents

## **5. Business Process Mapping (Salesforce Org View)**

**Step 1: Student Admission → Salesforce (Experience Cloud Portal)**

- Submit admission forms and documents
- Receive enrollment confirmation

**Step 2: Teacher → Salesforce (Attendance & Grade Objects)**

- Mark attendance daily
- Enter grades and remarks

### Step 3: Administration → Salesforce (Custom Student Object)

- Maintain student records (profile, courses, batch, fees)
- Monitor fee payments, generate reminders

### Step 4: Intelligent Process Automation

- **Attendance Tracking Triggers** – The system auto-detects irregular attendance and instantly sends alerts to concerned teachers or parents.
- **Digital Payment Reminders** – Scheduled notifications are generated to remind students about upcoming or pending fee payments.
- **Performance Watch Mechanism** – Students falling behind academic goals are automatically highlighted for early intervention.

### Step 5: Insights & Predictive Analysis

- **Real-Time Analytics Boards** – Central dashboards provide live reports on attendance trends, student progress, and fee status.
- **Forecasting Models** – AI-driven predictions help estimate student dropouts and anticipate delays in fee submissions.

## 6. Industry-Specific Use Cases

Use Case	Salesforce Implementation
Attendance Monitoring	Attendance object + Flow triggered alerts
Performance Tracking	Custom Grade object + Reports and Dashboards
Fee Management	Payment object + Scheduled Reminders
Parent Communication	Experience Cloud Portal + Email Notifications
Dropout Risk Prediction	Einstein Analytics + Prediction Builder

## 7. AppExchange Exploration

To strengthen Student Management CRM, potential AppExchange apps were analyzed:

- **SchoolApp** → End-to-end school administration management
- **Formstack** → Form automation for admissions and surveys
- **Accounting Seed** → Fee and financial transaction management
- **Salesforce Scheduler** → Schedule parent-teacher meetings
- **CRM Analytics** → Custom dashboards for performance and attendance

## 8. Key Insights from Phase 1

- Traditional paper-based and spreadsheet record management causes delays and data inconsistencies.
- Core priority areas identified are attendance management, fee processing, and academic performance tracking.
- A tailored Salesforce platform using custom student entities, workflow automation, and predictive analytics can address these challenges effectively.
- Leveraging pre-built solutions from AppExchange can significantly speed up deployment and reduce development workload.

## Phase 1 Deliverables

1. **Functional Requirement Report** – Documented academic, administrative, and communication needs for students, teachers, and staff.
2. **User Role & Access Matrix** – Defined user categories (student, teacher, admin) along with their responsibilities and permission levels.
3. **Process Flow Blueprint** – Mapped end-to-end processes like admissions, attendance, grading, and fee tracking in Salesforce.
4. **Feature Mapping Sheet** – Linked required functionalities (alerts, dashboards, reminders) with suitable Salesforce tools and automation.
5. **App Feasibility Study** – Researched potential AppExchange applications to enhance attendance, reporting, and financial modules