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

**1. Problem Statement**

A coaching institute is facing challenges in tracking student inquiries, enrollments, and follow-ups. Counselors manage leads in spreadsheets, which often leads to missed opportunities and poor conversion. The institute needs a Salesforce-based system to manage student leads, automate follow-up reminders, and generate reports on counselor performance.

**2. Requirement Gathering**

* Student inquiries are currently tracked in spreadsheets → Data gets scattered and unorganized.
* Counselors often miss follow-ups → Leads get cold and conversions drop.
* No centralized system to manage leads, enrollments, and communications.
* Management lacks real-time reports on counselor performance and admission pipeline.

**Core Requirement:**

A **Salesforce-based Education CRM** to streamline student lead management, automate reminders, and provide actionable insights

**3.Stakeholder Analysis**

* **Institute Owners/Directors** → Need admission pipeline visibility, counselor performance tracking, and revenue insights.
* **Counselors/Admissions Team** → Require centralized lead tracking, automated reminders, and simplified reporting.
* **Students/Parents** → Expect timely responses, clear counseling, and smooth enrollment experience.

**4.Business Process Mapping**

1. **Lead Capture** → From website, phone calls, walk-ins, and social media inquiries.
2. **Lead Assignment** → Distribution of leads among counselors.
3. **Follow-Ups** → Automated reminders for calls, SMS, emails, WhatsApp.
4. **Enrollment Process** → Application form, fee payment, and confirmation.
5. **Performance Tracking** → Conversion reports, pipeline analysis, counselor productivity dashboards.

**5.Industry-specific Use Case Analysis**

* **Coaching Institutes** → Manage student inquiries, admissions, class allocation, and fee tracking.
* **Universities/Colleges** → Application pipeline, admission counseling, and communication workflows.
* **EdTech Startups** → Trial class leads, nurturing campaigns, and online course payments.
* **Training Centers** → Enrollment tracking, certification issuance, and student feedback.

**6.AppExchange Exploration**

* Existing education CRMs on AppExchange are **too generalized or expensive** for small coaching institutes.
* Some student lifecycle apps exist, but lack customization for MSME-level education providers.
* **Gap identified** → Opportunity for a **lightweight, affordable, and customizable Salesforce Education CRM** tailored to coaching institutes.