

LearnSmart CRM

Salesforce-Based Education Management & Student Engagement System

Problem Statement

Educational institutions face challenges in managing student admissions, tracking performance, maintaining attendance, and ensuring effective communication between teachers, students, and parents. Many schools and colleges rely on manual processes or separate systems, leading to fragmented data, inefficiencies, and communication delays. Without a centralized CRM, educational management struggles with poor visibility into student progress, delayed decision-making, and inconsistent engagement. To address these challenges, a Salesforce-based solution, LearnSmart CRM, is proposed to streamline academic processes, automate communication, and enhance student experience.

Requirement Gathering

- Institutions struggle with manual student enrollment and admission tracking.
- Teachers lack integrated tools to monitor student performance and attendance.
- Parents and students require better communication channels.
- Manual grading and reporting cause delays in academic assessments.
- School administrators need dashboards to monitor admissions, attendance, and performance trends.
- Lack of reminders for exams, fees, and assignments reduces engagement.

Objectives

The primary objectives of LearnSmart CRM are to:

- Centralize student, teacher, course, and attendance data within Salesforce.
- Automate admission workflows and communication alerts for smoother onboarding.
- Provide teachers with tools to track and evaluate student performance.
- Offer a parent–student portal for transparency in academics and communication.
- Enable management to monitor real-time academic and administrative metrics.

- Integrate email/SMS notifications for reminders, results, and announcements.

Stakeholder Analysis

- Students: Need access to schedules, assignments, and grades.
- Teachers: Require performance tracking and communication tools.
- Parents: Need visibility into student progress and attendance.
- Administrators: Manage admissions, academic reports, and overall analytics.
- System Admins: Configure Salesforce, manage users, and maintain security.

Business Process Mapping

■ Current Process:

- o Admissions and fee payments handled manually.
- o Attendance and grades recorded on spreadsheets.
- o Communication via notice boards or phone calls.
- o Reports prepared manually.

■ Proposed Salesforce Process:

- o Students register online through Experience Cloud.
- o Teachers update attendance and grades digitally.
- o Automated reminders sent for classes, exams, and fees.
- o Real-time dashboards display academic and operational insights.

Industry-Specific Use Case Analysis

- Education sector requires digital transformation for improved learning outcomes.
- Salesforce CRM helps streamline academic workflows and student engagement.
- Automation reduces manual workload for teachers and administrators.
- Reports and dashboards enable data-driven educational decisions.
- Integrated communication enhances collaboration between schools, students, and parents.

AppExchange Exploration

- Salesforce Education Cloud: Provides education data model but limited customization

for smaller institutions.

- Blackboard CRM: Offers learning management but lacks Salesforce integration.
- Decision: Develop a custom Salesforce CRM solution tailored for schools and colleges focusing on admissions, performance tracking, and communication.

Conclusion

LearnSmart CRM provides a Salesforce-powered solution for schools and colleges to manage academic, administrative, and communication processes efficiently. By centralizing student data, automating workflows, and enabling digital collaboration, LearnSmart CRM improves the overall education experience for students, parents, and educators. The platform ensures transparency, enhances engagement, and supports data-driven academic management—helping institutions deliver quality education in an organized, connected, and measurable way.