EduManage – Phase 1: Problem Understanding & Industry Analysis
Problem Statement
Educational institutions often face inefficiencies due to:
- Lack of centralized student and teacher data.
- Manual tracking of enrollments, cases, and feedback.
- Poor coordination between students, teachers, and helpdesk staff.
- No real-time insights into student status, case resolution, or teacher performance.

This leads to delays in student support, untracked cases, mismanaged enrollments, and limited decision-making for administrators and management.

Therefore, a Salesforce CRM solution is needed to digitize student lifecycle management, teacher–student engagement, and institution-wide visibility.

Objectives
1. To centralize **student, teacher, and enrollment data** in Salesforce.
2. To automate **student status updates, case management, and notifications**.
3. To streamline **approval and escalation processes** for student inactivity and cases.
4. To provide **real-time dashboards** for student sources, enrollments, and teacher ratings.
5. To improve **student–teacher–helpdesk coordination** through automation and reporting.

Use Cases
1. **Student Management** – Register students with details like email, parent info, and source; track status (Active/Inactive).
2. **Enrollment Tracking** – Maintain digital records of enrollment start/end dates; validate against past dates; send alerts.
3. **Teacher & Feedback** – Link teachers to students; collect structured ratings/feedback.
4. **Case Management** – Capture student issues, auto-assign cases by priority, escalate unresolved cases.
5. **Reporting & Dashboards** – Student source analysis, teacher rating performance, and overall case resolution metrics.

Stakeholder Analysis
- **Students**: Need seamless enrollment, case resolution, and communication.
- **Teachers**: Need to manage student associations and receive structured feedback.
- **Helpdesk Users**: Handle cases, update student records, and access shared data.
- **Administrators**: Approve inactive student requests, manage workflows, and configure system rules.
- **Management**: Want dashboards for student lifecycle insights, enrollment trends, and teacher performance.

Business Process Mapping (Before Salesforce)
- Student admissions and updates handled manually → prone to errors.
- Enrollment details not validated → incorrect records.
- Student cases assigned without proper priority → delays in resolution.
- Teacher feedback collected informally → no structured ratings.
- Reports prepared manually → time-consuming and error-prone.

Industry-Specific Use Case Analysis (Education)
- Similar to **Healthcare CRM**: student cases managed like patient cases.
- Similar to **Real Estate CRM**: enrollment process comparable to property bookings.
- Similar to **Retail CRM**: student onboarding is like customer onboarding with approvals.