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

**Requirement Gathering**

Educational institutions, especially colleges and universities, face challenges in handling thousands of student inquiries during admission seasons. Currently, most follow a **manual or semi-digital approach** (Excel sheets, emails, phone calls). This causes:

* Loss of potential student leads due to poor tracking.
* Delays in responding to students and parents.
* Difficulty in maintaining a **single source of truth** for student data.
* No real-time visibility of admission progress for management.

Thus, the requirement is to build a **centralized CRM system** that automates lead tracking, improves student communication, and provides real-time dashboards.

**Stakeholder Analysis**

* **Admission Officers** → Manage student inquiries, follow-ups, and applications.
* **Students & Parents** → Expect timely updates, clear communication, and transparency in admission progress.
* **Administrators/Management** → Need dashboards and reports to track admission performance and forecast future trends.
* **IT/Support Staff** → Ensure system availability, user training, and data management.

**Business Process Mapping**

**Current Admission Process (Manual):**

1. Student inquiry received via phone/email/form.
2. Admission officer manually records data in Excel or registers.
3. Follow-up reminders are handled manually.
4. No clear tracking of how many inquiries convert to admissions.

**Proposed Salesforce-based Admission Process:**

1. Inquiries automatically captured as **Leads** in Salesforce.
2. Leads qualified and converted into **Opportunities (Admission Applications)**.
3. Once confirmed, students stored in a **custom object (Student Record)**.
4. Automated email/SMS reminders keep students/parents informed.
5. Dashboards & reports give real-time insights into admissions.

**Industry-Specific Use Case Analysis (Education Sector)**

* **Problem:** High volume of inquiries, lack of follow-ups, poor data visibility.
* **Use Case:** CRM can help institutions manage the full **student lifecycle** from inquiry to admission.
* **Impact:**
  + Increased student conversion rates.
  + Improved communication with students/parents.
  + Enhanced reputation of the institution with a transparent admission process.

**AppExchange Exploration**

Salesforce **AppExchange** already offers education-specific solutions like:

* **Salesforce.org Education Cloud** (for higher education institutions).
* **TargetX CRM** (student recruitment and engagement).
* **Enrollment Rx** (end-to-end admission management).

Our EduCRM project will take inspiration from these real-world solutions but will be a **simplified custom CRM**, tailored for admission tracking and student communication.