

PROJECT READY TALENT PROGRAM

Project title:

CRM Application to Manage the Services offered by an Institution

PREPARED BY

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Objective:

EduConsultPro Institute seeks to overcome challenges in managing the admission process, student inquiries, and expert consulting services. By implementing Salesforce CRM, the goal is to provide a seamless, efficient, and transparent experience for prospective students and admissions staff.

Scope of the Project:

1. Streamlining Admission Processes:

- Automating workflows for application submission, document verification, and review processes.
- Ensuring real-time updates on application status for prospective students.

2. Centralizing Inquiry Management:

- Offering a single platform to manage student inquiries across multiple channels (email, phone, web forms).
- Categorizing and assigning inquiries based on urgency and relevance to specific departments.

3. Enhancing Expert Consulting Services:

- Efficiently managing student cases by assigning them to the right consultant or expert.
- Monitoring case progress and ensuring timely resolutions.

4. Data-Driven Decision-Making:

- Generating insights into admission trends, student preferences, and operational bottlenecks using real-time dashboards and analytics.

Use Case Description:

EduConsultPro receives hundreds of inquiries and applications each year. These inquiries range from course details and eligibility criteria to specific guidance on career paths. The manual handling of these tasks leads to delays, mismanagement, and inefficiencies.

Salesforce CRM will address these challenges by:

- Providing a unified platform for all admissions-related activities.
- Reducing manual workloads with automation.
- Enhancing student satisfaction through timely responses and updates.

System Features in Detail:

1. Centralized Student Inquiry Management:

- **Inquiry Logging:**
Students can submit inquiries via a web portal or a mobile app. Inquiries are auto-logged into Salesforce CRM.
- **Categorization:**
Each inquiry is tagged by program type, urgency, or department. For example, an inquiry about a postgraduate course will be routed to the postgraduate admissions team.
- **Tracking and Resolution:**
Admissions staff can track the status of each inquiry. Automated reminders ensure timely responses.

2. Admission Process Automation:

- **Online Application Form:**
Prospective students can submit applications through an interactive web form integrated with Salesforce.
- **Document Upload and Verification:**
Documents like transcripts, ID proofs, and resumes can be uploaded. Automated workflows flag missing or incorrect documents.
- **Application Tracking:**
Students receive automated notifications for each step, such as "Application Received,"

"Under Review," and "Decision Released."

3. Case Management for Consulting Services:

- **Case Creation:**
When students require expert advice or guidance, they can submit a consultation request.
- **Expert Assignment:**
Cases are assigned to subject-matter experts based on predefined criteria, such as area of expertise or availability.
- **Resolution Tracking:**
Cases are monitored for resolution time and quality, ensuring student satisfaction.

4. Real-Time Dashboards and Reports:

- Dashboards provide insights into inquiry volumes, application statuses, and consultant workloads.
- Reports on key metrics, such as inquiry-to-application conversion rates and case resolution times, are auto-generated.

5. Enhanced Communication Channels:

- **Email/SMS Notifications:**
Students are kept informed about their application or case status. For instance, an email might notify a student, "Your application has been successfully submitted."
- **Live Chat Support:**
A live chat feature enables students to ask quick questions and receive instant responses.

Workflow Diagram:

1. Inquiry Management Workflow:

1. Student submits an inquiry via web or mobile.
2. Inquiry auto-categorized and assigned to a staff member.
3. Staff member responds, and the response is logged in Salesforce.

2. Admission Process Workflow:

1. Student fills out an online application form.
2. Documents are uploaded and verified.
3. Admissions staff review applications and approve/reject them.
4. Status updates are sent to students via email/SMS.

3. Case Management Workflow:

1. Student submits a request for expert consulting.
2. A case is created and assigned to an expert.
3. Expert resolves the case and updates the status.
4. Student is notified of case resolution.

Roles and Responsibilities:

1. Admissions Staff:

- Review applications and respond to inquiries.
- Assign cases to consultants.
- Update application and inquiry statuses in Salesforce CRM.

2. IT Team:

- Set up and configure Salesforce CRM to meet EduConsultPro's needs.
- Integrate external systems such as email, SMS gateways, and online payment systems.
- Provide ongoing technical support and training to staff.

3. Students:

- Submit inquiries and applications.
- Track application or case status.
- Communicate with staff or consultants via the platform.

Benefits of Salesforce CRM Implementation:

For Students:

1. **Transparency:** Real-time updates on inquiries and applications.
2. **Convenience:** Simplified process for submitting forms and inquiries.
3. **Better Support:** Quick access to expert advice.

For Admissions Staff:

1. **Efficiency:** Reduced manual workloads with automation.
2. **Organization:** Centralized data management for easy access.
3. **Insights:** Data-driven decisions using analytics tools.

For Management:

1. **Trends and Insights:** Reports on admissions trends and student preferences.
2. **Resource Optimization:** Better allocation of staff and experts.
3. **Improved Satisfaction:** Higher student satisfaction leads to better reputation and enrollment rates.

Technical Specifications:

- **Platform:** Salesforce Education Cloud
- **Key Tools:**
 - Salesforce Case Management
 - Workflow Automation Tools
 - Einstein Analytics for reporting
- **Integrations:**
 - Email and SMS gateways for communication.
 - Payment gateways (if required) for admission fees.

Implementation Phases:

Phase 1: Analysis and Planning:

- Identify requirements through stakeholder interviews and workshops.
- Define system architecture and integration points.

Phase 2: Configuration and Development:

- Set up Salesforce CRM.
- Develop custom workflows and forms.
- Integrate external systems (e.g., email gateways).

Phase 3: Testing:

- Conduct unit testing, system testing, and UAT.
- Validate workflows and data accuracy.

Phase 4: Deployment:

- Roll out Salesforce CRM in phases, starting with inquiry management.
- Gradually add features like case management and dashboards.

Phase 5: Training and Support:

- Train admissions staff on CRM usage.
- Provide ongoing technical support and gather user feedback.

Expected Outcomes:

1. Reduction in response time for student inquiries by 50%.
2. Increase in inquiry-to-application conversion rates by 20%.
3. Enhanced satisfaction rates among students and admissions staff.

Conclusion:

The Salesforce CRM implementation will revolutionize EduConsultPro's admissions and consulting services. With automated workflows, centralized data management, and enhanced communication channels, the institute will deliver a seamless experience for students while improving operational efficiency.