

PROJECT PLANNING PHASE

Date	01-11-2025
Team ID	NM2025TMID06526
Project Name	Educational Organization using ServiceNow

PURPOSE OF THE PLANNING PHASE:

The main purpose of the project planning phase is to create a clear plan for how our team will build and complete the “Educational Organization” application using ServiceNow.

This phase helps us decide what tasks to do, who will do them, what tools are needed, and how much time each step will take.

PROJECT OVERVIEW:

An educational institution utilizing ServiceNow streamlines its administrative and IT operations through a unified digital platform. By integrating ServiceNow, the organization enhances service delivery across departments such as IT, HR, Facilities, and Student Services. The platform enables efficient ticketing systems for technical support, automates routine workflows like onboarding new staff or enrolling students, and provides a centralized portal for knowledge sharing and self-service. This digital transformation improves operational efficiency, reduces response times, and enhances the overall experience for students, faculty, and administrative staff.

Admissions Management

- **Automated Workflows:** ServiceNow enables institutions to automate admission processes such as application intake, document verification, and interview scheduling.
- **Salesforce Integration:** Salesforce Education Cloud provides tools for recruitment and admissions, including personalized outreach, application tracking, and analytics to improve enrolment strategies.
- **Unified Portals:** Applicants can access a centralized portal to submit documents, check application status, and communicate with admissions staff.

Student Progress Tracking

- **Academic Monitoring:** ServiceNow allows educators and administrators to track student performance, attendance, and milestones using custom tables and dashboards.
- **Alerts and Notifications:** Automated alerts can notify students and faculty about academic deadlines, progress reports, or intervention needs.
- **Data-Driven Insights:** Integration with Salesforce enables real-time analytics on student success, helping institutions identify trends and support at-risk students.

Salesforce

- **Cross-Platform Data Flow:** Salesforce handles front-end engagement (e.g., recruitment, alumni relations), while ServiceNow manages back-end operations (e.g., IT support, academic workflows).
- **Custom Applications:** Institutions can build tailored apps using ServiceNow's low-code tools to support unique academic programs or administrative needs.
- **Scalable Infrastructure:** Both platforms offer cloud-based scalability, ensuring institutions can grow without compromising performance or security.

PROJECT GOAL

Streamline Admissions Processes:

- **Automate Application Workflows:** Use ServiceNow to automate tasks like application intake, document verification, and interview scheduling.
- **Enhance Applicant Engagement:** Leverage Salesforce Education Cloud to personalize communication and track applicant interactions.
- **Improve Decision-Making:** Integrate data from both platforms to provide real-time insights into application trends and conversion rates.

Enhance Student Progress Monitoring:

- **Centralize Academic Records:** Maintain a unified view of student performance, attendance, and milestones using ServiceNow's custom dashboards.
- **Enable Proactive Interventions:** Set up alerts and workflows to notify advisors or faculty when students are at risk.
- **Support Personalized Learning Paths:** Use Salesforce to analyze student data and recommend tailored academic resources or support services.

Unify Institutional Data and Services:

- **Integrate Front-End and Back-End Systems:** Connect Salesforce (student engagement) with ServiceNow (service delivery) for a seamless experience.
- **Provide a Self-Service Portal:** Allow students and staff to access services, submit requests, and track progress through a single interface.
- **Ensure Data Accuracy and Compliance:** Maintain secure, up-to-date records across platforms to meet regulatory and institutional standards.

Improve Operational Efficiency:

- **Reduce Manual Workloads:** Automate repetitive administrative tasks to free up staff for high-impact work.
- **Accelerate Response Times:** Use ServiceNow's ticketing and workflow tools to resolve student and faculty requests faster.
- **Optimize Resource Allocation:** Analyse service usage and academic data to better allocate faculty, facilities, and support services.

PROJECT DELIVERABLES:

At the end of the project, our team will deliver:

1. **Integrated Admissions Workflow**
 - Automated application intake, review, and decision-making process using ServiceNow and Salesforce Education Cloud.
 - Custom applicant portal with real-time status tracking and communication tools.
2. **Student Progress Monitoring Dashboard**
 - Centralized dashboard in ServiceNow to track academic milestones, attendance, and performance indicators.
 - Automated alerts for at-risk students and academic interventions.
3. **Salesforce-ServiceNow Integration Framework**
 - Seamless data flow between Salesforce (student engagement) and ServiceNow (service management).
 - Secure APIs and middleware configuration for real-time synchronization.

4. Self-Service Portal for Students and Staff

- Unified portal for submitting service requests, accessing academic records, and receiving notifications.
- Mobile-responsive design with role-based access controls.

5. Training and Documentation

- User manuals and training sessions for administrators, faculty, and support staff.
- Knowledge base articles and video tutorials for end users.

6. Performance and Compliance Reports

- Custom reports and dashboards for admissions metrics, student success tracking, and service performance.
- Compliance-ready data handling and audit trails.

7. Post-Implementation Support Plan

- 30-day hyper care support period.
- Handover of system documentation and maintenance guidelines.

TEAM ROLES AND RESPONSIBILITIES:

ROLE	RESPONSIBILITY
Team Leader	Manage the project and assign tasks
Developer	Create tables, forms, and workflows
Tester	Check system functions and report bugs
Documentation Lead	Write report and prepare presentation

RESOURCES NEEDED:

Platform: ServiceNow Developer Instance

Tools: Flow Designer, Tables, and Dashboard modules

Hardware: Laptop or desktop with Internet access

Software: Any web browser (e.g., Chrome, Edge)

Team Members: 3–5 students

CONCLUSION

This project plan gives our team a clear direction for developing the “Educational Organisation” system. With proper time management, teamwork, and use of ServiceNow tools, we aim to complete the project successfully