■ Admissions & Academic Journey CRM

Phase 1: Problem Understanding & Industry Analysis

Project Title: Admissions & Academic Journey CRM

Industry: Higher Education / EdTech

Target Users:

- Prospective Students
- Admissions Officers
- Faculty & Academic Advisors
- Student Support Staff
- University/College Administrators

1. Problem Statement

Educational institutions rely on manual processes for admissions and scattered academic systems. This causes delays in enrollment, poor tracking of student progress, and challenges in providing effective support.

Goal:

- Automate the admission process from inquiry to enrollment.
- Provide a centralized 360° student profile for academic tracking.
- Streamline student support with case management.
- Equip administrators with real-time dashboards for decision-making.

2. Requirement Gathering

- Prospective Students: Submit applications online and track admission status.
- Admissions Officers: Capture inquiries, process applications, and manage enrollment.
- Faculty & Academic Advisors: Record attendance, grades, and monitor academic progress.
- Student Support Staff: Resolve student academic or administrative queries through Cases.
- Administrators: Access reports and dashboards on admissions, academics, and support.

3. Stakeholder Analysis

- Primary Users: Prospective Students, Enrolled Students.
- Secondary Users: Admissions Officers, Faculty, Student Support Staff.
- Decision Makers: University/College Administration.

4. Business Process Mapping

Current Process:
1. Inquiries collected manually via email/phone.
2. Admissions data stored in spreadsheets with delayed updates.
3. Application reviews are slow and paper-based.
4. Academic records scattered across multiple systems.
5. Student issues handled informally with no proper tracking.

Proposed Salesforce Process:
1. Student inquiry auto-captured into Prospective Student object.
2. Admission application submitted online via Experience Cloud portal.
3. Application review and approvals automated through Flows & Approval Processes.
4. Upon acceptance → auto-create Student record in Student object.
5. Faculty update grades/attendance in Academic Record object.
6. Student queries logged as Cases and routed to support staff.
7. Administrators monitor performance via Dashboards and Reports.

5. Industry-Specific Use Case Analysis

- The higher education sector increasingly adopts CRMs to manage student lifecycles.
- Key best practices:
• Automation of admissions workflows.
• Integration of academic records into a central system.
• Dashboards for leadership to track admissions and academic progress.
• Case management for student support.

6. AppExchange Exploration

- FormAssembly / Admission Apps – for online application management.
- LMS Integrations (Canvas, Moodle, Blackboard) – for syncing academic data.
- Survey Force (Free) – to capture student satisfaction.
- Case Management Enhancers – to strengthen student support services.