

# ■ Admissions & Academic Journey CRM

Phase 1: Problem Understanding & Requirements Analysis

**Project Title:** Admissions & Academic Journey CRM

**Industry:** Higher Education / EdTech

## Target Users:

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

## 1. Problem Statement

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

### Goal:

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

## 2. Requirement Gathering

**Prospective Students:** Need the ability to submit applications online and track their admission status.

**Admissions Officers:** Need to capture inquiries, process applications, and manage the enrollment process.

**Faculty & Academic Advisors:** Need to record student attendance and grades, and monitor academic progress.

**Administrators:** Require access to reports and dashboards covering admissions and academics.

## 3. Stakeholder Analysis

**Primary Users:** Prospective Students, Enrolled Students

**Secondary Users:** Admissions Officers, Faculty

**Decision Makers:** University/College Administration

## 4. Business Process Mapping ■■

### Current Process:

- Inquiries are collected manually through email and phone calls.

- Admissions data is kept in spreadsheets that have delayed updates.
- Application reviews are slow and based on paper documents.
- Academic records are dispersed across multiple different systems.

**Proposed Salesforce Process:**

- A student inquiry is automatically captured into a Prospective Student object.
- Admission applications are submitted online through an Experience Cloud portal.
- Application review and approval steps are automated using Flows and Approval Processes.
- When an applicant is accepted, a Student record is automatically created in the Student object.
- Faculty can update grades and attendance in an Academic Record object.
- Administrators can monitor performance using Dashboards and Reports.

## 5. Industry-Specific Use Case Analysis

- Automation of admission workflows.
- Integration of academic records into a single, central system.
- Dashboards for leadership to monitor admissions and academic progress.

## 6. AppExchange Exploration ■■■

- FormAssembly / Admission Apps: For managing online applications.
- LMS Integrations (Canvas, Moodle, Blackboard): For synchronizing academic data.
- Survey Force (Free): To collect data on student satisfaction.