Project Report - Phase 1

Name: P Sai Lalith

Project Title: Student Registration Portal – Salesforce CRM Implementation for Universities

# Phase 1: Problem Understanding & Industry Analysis

## 1. Requirement Gathering

The project aims to create a Student Registration Portal on Salesforce to simplify and automate the student registration and enrollment process. The requirements identified include:  
- Allow students to register online.  
- Enable administrators to approve or reject registrations.  
- Assign courses to students based on their program.  
- Track enrollment status and maintain student records.  
- Provide dashboards and reports for faculty and administrators.

## 2. Stakeholder Analysis

Key stakeholders for this project include:  
- Students: End-users registering and enrolling in courses.  
- Faculty: Responsible for course management and reviewing student progress.  
- University Administrators: Approve registrations, manage academic records, and monitor reports.

## 3. Business Process Mapping

The current manual admission and registration process relies on paper forms and spreadsheets, leading to inefficiency and errors. The proposed Salesforce-based solution will digitize the process:  
- Students register online through a portal.  
- Registration requests move into an approval workflow.  
- Faculty assign or verify course enrollments.  
- Administrators monitor the entire process using dashboards and reports.

## 4. Industry-specific Use Case Analysis

In the education industry, student registration and enrollment are critical operations. Salesforce provides a scalable CRM solution tailored for education institutions. The system will enhance student experience, reduce administrative workload, and provide real-time visibility into enrollment trends.

## 5. AppExchange Exploration

Salesforce AppExchange offers applications for student management and education CRM solutions. For this project, AppExchange was explored to identify tools for SMS/email confirmations and course management modules. However, the decision was made to build custom objects (Student, Course, Enrollment) to gain hands-on implementation experience.