Smart Education Portal – Student Enrollment & Engagement Management System

Industry

Education (Universities, Colleges, Training Institutes)

Project Type

B2C Salesforce CRM Implementation

Target Users

Admissions Officers, Faculty Members, Students, and Parents

Problem Statement

A university receives thousands of student applications and course inquiries every academic year through its website, admission fairs, and phone calls. Currently, application processing, interview scheduling, and follow-ups are manual, leading to lost leads and delayed admissions. Student queries are handled in silos (email, phone, WhatsApp), making it difficult to track communication. Faculty members also struggle to monitor student progress and engagement across different systems.

To solve this, the university wants to implement Salesforce CRM to:
• Automate student application and admission process
• Centralize student records (applications, enrollment status, courses, grades)
• Enable online scheduling for interviews, counseling, and classes
• Track student engagement and satisfaction
• Provide dashboards for admissions and academic performance monitoring

Use Cases

1. Lead Management (Prospective Students)

- Capture leads from website, admission fairs, and third-party portals
- Assign inquiries to admissions officers based on program/department
- Prioritize high-value leads (e.g., international applicants)

2. Student Management

- Maintain centralized student records (applications, transcripts, courses)
- Track enrollment status (applied, shortlisted, admitted, enrolled)

3. Scheduling & Counseling

- Allow students to schedule counseling sessions or interviews online
- Send automated SMS/Email reminders for interviews and orientation

4. Course Management

- Assign students to courses/programs based on enrollment
- Track attendance, grades, and progress

5. Case Management (Student Support)

- Log and resolve student issues (academic, hostel, fee-related)
- Assign cases to the right department and track SLA compliance

6. Billing & Payments

- Manage fee payment history
- Integrate with payment gateways and scholarships/loans

7. Reporting & Dashboards

- Track admission funnel (inquiries → applicants → admitted → enrolled)
- Monitor faculty performance and student engagement
- Dashboard for administrators to view revenue and seat utilization

Salesforce Tools Involved

Admin Side

- Objects: Leads, Accounts, Contacts, Opportunities, Cases, Courses (custom)
- Automation: Workflow Rules, Validation Rules, Assignment Rules, Approval Processes
- Reports & Dashboards
- Security: Profiles, Roles, Permission Sets

Developer Side

- Apex Triggers (e.g., auto-create student record after admission approval)
- Lightning Components (custom student portal & faculty portal)
- Integrations (Payment gateways, Learning Management Systems (LMS))
- Custom Objects (e.g., 'Transcripts', 'Course Enrollment')