

Phase 1: Problem Understanding & Industry Analysis — EduBridge CRM

Project Title:

EduBridge CRM – Mentorship & Scholarship Connect

Goal:

EduBridge CRM is designed as a **Salesforce-based platform**, not just a single application. It integrates multiple user groups (students, mentors, sponsors, and administrators) into one unified ecosystem.

The goals are to:

- Provide structured mentorship and career guidance.
 - Streamline scholarship application and disbursement processes.
 - Enable transparent donor/sponsor fund management.
 - Deliver holistic insights into student success through Salesforce dashboards and reports.
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1.Requirement Gathering Engaged Stakeholders:

- Students
- Mentors (faculty, alumni, industry experts)
- Sponsors/Donors(NGOs, corporates, philanthropists)
- College Administrators
- Career Services/Placement Officers

Example Requirements:

- Student & mentor profile management (skills, goals, expertise).
- Mentor-student matching system based on interest/domain.
- Mentorship session scheduling, feedback & progress tracking.
- Scholarship opportunity listings (academic, sports, financial need).
- Application workflow: submission → review → approval → disbursement.

- Sponsor/Donor management with fund allocation tracking.
 - Integrated dashboards showing impact of mentorship + scholarships.
 - Notifications for upcoming sessions, deadlines, disbursement status.
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2.Stakeholder Analysis

- Platform Administrator: Manages data integrity, user roles, and platform settings.
 - Student: Applies for scholarships, requests mentorship, attends sessions.
 - Mentor: Guides students, schedules sessions, tracks mentee progress.
 - Sponsor/Donor: Funds scholarships, monitors fund utilization, receives reports.
 - College Admin: Reviews applications, manages mentor assignments, approves scholarships.
 - Placement Officer: Uses mentorship and scholarship data to improve student outcomes.
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3.Business Process Mapping

Mentorship Flow:

1. Student submits mentorship request with skills/goals.
2. System suggests mentors based on domain & availability.
3. Mentor accepts → session scheduled.
4. Mentor conducts session & records feedback.
5. Student progress logged for placement team review.

Scholarship Flow:

1. Student applies for scholarship opportunity.
2. Application routed for review by college admin.
3. Sponsor/Donor reviews shortlisted students.
4. Approval → fund allocation → disbursement recorded.
5. Reports update scholarship utilization & impact.

Integrated View:

- Admin dashboard combines mentorship progress + scholarship support → holistic view of student success.
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4.Industry-Specific Use Case Analysis

- Education sector challenge: Mentorship is fragmented, scholarships are paper-heavy → low accessibility.
 - Student-centric approach: Must be simple, mobile-friendly, and transparent.
 - Diverse stakeholders: Students, mentors, sponsors, and admins need role-based access.
 - High dependency on transparency: Sponsors require visibility into fund usage → dashboards essential.
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5.AppExchange Exploration

Existing Solutions:

- MentorcliQ, Everwise (for mentorship).
- Blackbaud, SmarterSelect (for scholarships).

Limitations:

- Focused on one aspect (either mentorship OR scholarships).
- High cost, less customization.

EduBridge CRM Opportunity:

- End-to-end platform → integrates mentorship + scholarships.
 - Transparent sponsor tracking.
 - College-focused, student-first design.
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6.Gap Analysis (Existing vs Proposed)

Existing Systems:

- Disjointed (mentorship & scholarship handled separately).
- Manual or semi-digital workflows.
- Limited analytics on student success.

EduBridge CRM:

- Unified mentorship + scholarship ecosystem.
 - Automated workflows & approvals.
 - Real-time dashboards for impact measurement.
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7. Technology Landscape & Tools

Platform: Salesforce

- Service Cloud → mentorship support, student requests.
 - Experience Cloud → student/mentor/sponsor portals.
 - Tableau CRM → dashboards & insights.
 - Flows & Approval Processes → automate applications & reviews.
 - Optional: Apex for mentor-matching logic.
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8. Risks & Mitigation

- Low mentor participation → Incentives, automated reminders.
 - Scholarship delays → Automated approval processes, SLA tracking.
 - Data overload → Validation rules, structured forms.
 - Transparency issues → Role-based dashboards for sponsors.
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9. Success Metrics

- % of students matched with mentors.
 - % of scholarship applications processed digitally.
 - Average scholarship disbursement time.
 - Student placement rate improvement.
 - Sponsor satisfaction & transparency ratings.
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10. Future Vision

- AI-driven mentor matching (skills, career goals).
- Predictive analytics for student success (placement probability).
- Blockchain-based scholarship tracking for tamper-proof fund flow.
- Scalable adoption across universities, NGOs, and government programs.