Phase 1 – Problem Understanding & Industry Analysis

1. Project Title

Smart Student Management CRM – College & Training Institute Solution

2. Problem Statement

In most colleges and training institutes, student data management is still handled manually. Admissions, attendance, fee payments, and placement tracking are maintained in spreadsheets or offline registers.
- This causes delays, duplicate records, and data loss.
- Faculty and admin staff face difficulties in tracking student performance.
- Placement tracking and recruiter communication are inefficient and poorly documented.

3. Objectives

The main objectives of this project are to:
- Automate the admissions process (leads → students).
- Digitally manage course enrollment and attendance.
- Maintain fee payment status and send reminders.
- Track placement activities (companies, interviews, offers).
- Provide reports and dashboards (Admissions, Attendance, Placements).

4. Stakeholder Analysis

- Admin → Controls the entire system (users, reports, fee management).
- Faculty → Manages students, courses, and attendance.
- Students → Can view their courses, attendance, and fee status.
- Placement Officer → Manages company details, interview schedules, and placement results.

5. Business Process Mapping

1. Admissions Process: Lead capture from website forms → Salesforce Lead → Convert to Student record.
2. Course Management: Assign students to courses.
3. Attendance Management: Faculty enters daily attendance; reports are generated automatically.
4. Fee Tracking: Maintain fee records and send reminders for pending payments.
5. Placement Management: Track student applications, interview schedules, and final results.

6. Industry-Specific Use Case Analysis

- In the education sector, most institutes still rely on manual or Excel-based record keeping.
- Salesforce CRM can provide a centralized data management system.
- This will improve student engagement, streamline processes, and increase placement success rates.

7. AppExchange Exploration (Future Scope)

- Education Cloud apps (for higher education and training institutes).
- Document Management apps (for fee receipts, certificates, transcripts).
- Messaging/WhatsApp integration for automated student communication.

■ Deliverable of Phase 1:

This document (Requirements + Analysis) should be saved in your GitHub repository as:
docs/Phase1_ProblemUnderstanding.md