

# Phase-1: Problem Understanding & Industry Analysis

## Project Title:

EduConnect: End-to-End Student Admission, Enrollment, & Engagement CRM

## Industry:

Education (Universities, Colleges, EdTech)

## Target Users:

- Admission Officers: Manage student applications and admissions pipeline
- Faculty: Monitor student performance and engagement
- Students & Parents: Track application status, communicate with staff
- Management: Gain insights via dashboards for admissions & academic performance

## Problem Statement:

University admission and enrollment processes are often manual, fragmented, and lack transparency. This leads to several challenges:

- Manual Admissions: Applications handled via email/spreadsheets cause delays & errors.
- Inconsistent Interview Scheduling: Ad hoc scheduling leads to missed appointments.
- Poor Student Engagement Tracking: No centralized way to monitor progress & attendance.
- Limited Visibility for Stakeholders: Lack of real-time dashboards for admissions & engagement.

The institution needs a Salesforce-powered CRM to:

- Streamline application intake and automate status updates/notifications.
- Centralize student, application, and course data for all stakeholders.
- Automate interview scheduling and reminders.
- Track applications, enrollments, and course progress.
- Provide actionable analytics for management, faculty, and staff.

## Requirement Gathering:

- Interview Admission Officers, Faculty, Students, and Parents to understand pain points.
- Identify essential custom Salesforce objects (Student, Application, Course, Attendance, Exam Result).
- Define process automation needs (auto-assignment of applications, interview scheduling, enrollment triggers).
- Determine reporting requirements for each stakeholder.
- Assess need for external integrations (exam portals, payment gateways, SMS/email notifications).

## **Stakeholder Analysis:**

- Admission Officers: Manage applications & interviews, need fast processing & communication tools.
- Faculty: Track enrollment, attendance, and results; intervene proactively.
- Students & Parents: Self-service portal to apply, check status, receive notifications.
- Management: Dashboards for admissions, performance, and engagement KPIs.
- Developers/Admins: Build automations, maintain data integrity, manage integrations.

## **Business Process Mapping:**

- Application Submission: Student/parent submits application via portal.
- Verification & Screening: Officer reviews & verifies documents, schedules interview.
- Interview Scheduling: Automated scheduling & reminders.
- Admission Decision: Application moves through review/approval with notifications.
- Enrollment: Accepted students enrolled in courses; records created.
- Course Tracking: Faculty update attendance & performance.
- Reporting & Analytics: Dashboards/reports for all stakeholders.

## **Industry-Specific Use Cases:**

- Digital Admission Management: Online applications with automated updates.
- Interview Scheduling Automation: Flow-based scheduling + calendar integration.
- Course Enrollment & Tracking: Enroll students & track performance.
- Self-Service Student Portal: Status tracking, uploads, and offers.
- Advanced Reporting & Dashboards: Real-time insights.

## **AppExchange Exploration:**

- Education Cloud: Pre-built education data model/workflows.
- SMS Magic: Automated SMS reminders.
- DocuSign: E-signatures for offer letters.
- Calendar Sync: Scheduling integration.
- Reporting Accelerators: Enhanced dashboards.