Student Enquiry CRM

## Phase 1 – Problem Understanding & Industry Analysis

## 1. Requirement Gathering

**Description:**  
Many educational institutions receive student enquiries from multiple channels such as website forms, referrals, and events. Tracking these manually can lead to missed follow-ups and lost potential students.

**The Student Enquiry CRM aims to:**

* Record all student enquiries in a structured format.
* Automate follow-up reminders for counselors.
* Track enquiry sources to evaluate marketing effectiveness.
* Improve conversion rates from enquiries to enrolled students.

## 2. Stakeholder Analysis

**Description:**  
Identifying stakeholders helps understand who will interact with the CRM and their requirements.

**Table of Stakeholders:**

| Stakeholder | Role | Requirement from CRM |
| --- | --- | --- |
| Counselor | Manage enquiries | View new enquiries, receive follow-up reminders, update status |
| Admin | Configure CRM | Create users, manage fields, automate flows |
| Student | Submit enquiry | Receive timely follow-up from counselors |

## 3. Business Process Mapping

**Description:**  
The business process shows the lifecycle of a student enquiry:

1. Student submits enquiry (via Website, Referral, Event).
2. CRM records the enquiry in the Student Enquiry object.
3. Follow-Up Task is automatically created for counselors.
4. Counselor completes follow-up.
5. Status updated to Converted or Lost.

## 4. Industry-specific Use Case Analysis

**Description:**  
Education CRMs commonly use automated reminders and source tracking to improve student engagement and conversion.  
Key benefits include:

* Ensures no enquiry is missed.
* Provides data for evaluating marketing channels.
* Improves counselor productivity.
* Generates reports for management to track performance.

## 5. AppExchange Exploration

**Description:**  
Salesforce AppExchange offers applications for lead and student enquiry management. Exploring these apps helped define features for our project, such as:

* Automatic follow-up reminders.
* Source tracking.
* Reporting on enquiry conversions.