Student Admission & Enrollment CRM

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering
The education industry faces challenges in efficiently managing student applications, admissions, and course enrollments. Traditional systems often rely on **manual** spreadsheets or multiple disconnected software, leading to:
- Delays in application processing and admission decisions.
- Lack of automated notifications for application status.
- Poor visibility into course availability and enrollment capacity.
- Inefficient tracking of student enrollment and progress.

Key requirements identified:
- Centralized system to manage Students, Admission Officers, Applications, and Courses.
- Ability to track application status, enrollment assignments, and course availability.
- Application submission with status updates, notifications, and approval/rejection tracking.
- Enrollment assignments linked to student applications for approved candidates.
- Role-based access for Students, Admission Officers, and Admins.
- Reports and dashboards to monitor applications, admissions, and course enrollment statistics.

2. Stakeholder Analysis
Primary stakeholders:
- **Admin** – manages the overall system, configures business rules, and oversees reporting.
- **Admission Officers** – review applications, approve/reject candidates, and manage enrollments.
- **Students** – submit applications, track status, and receive notifications.

Secondary stakeholders:
- **Educational Management/Institutes** – need reports for strategic decision-making.
- **IT/Admin Team** – manages Salesforce configurations, user profiles, and security.

3. Business Process Mapping
Current (manual) process:
- Students submit applications via forms or email.
- Admission officers manually review applications, often using spreadsheets.
- Status updates are communicated via email or phone.
- Enrollment records are maintained separately, with limited visibility and reporting.

Proposed (Salesforce CRM) process:
- Student creates a new Application record in Salesforce.
- Application links to Student record and, upon approval, to Course records.
- Admission Officer reviews and updates application status.
- System automatically sends notifications to students about approval/rejection.
- Enrollment is assigned to approved students, linked to courses.
- Reports and dashboards provide real-time visibility into applications, admissions, and enrollments.

4. Industry-Specific Use Case Analysis
- **Universities & Colleges** – Managing large volumes of student applications and multiple programs.
- **Coaching Institutes** – Tracking batch assignments and student progress efficiently.
- **Online Education Platforms** – Scalable enrollment management and integration with LMS platforms.

This project addresses automation, centralized data, and real-time tracking, which are critical for modern education institutions.

5. AppExchange Exploration
Explored similar apps on Salesforce AppExchange for benchmarking:
- **Enrollment Rx Core** – Provides applicant tracking and enrollment workflow management for higher education.
- **Recruitment & Admissions App** – Part of Salesforce Education Cloud, helps manage student applications and tasks.
- **Custom App Approach** – Chosen for flexibility, cost-effectiveness, and full control over workflows and notifications for the project.