Course Enrollment Portal

Thanks for the Opportunity:

clicked

SALESFORCE TALENT ALLIANCE

Presented by: Team 27

Three TACCies

AGENDA

1. Introduction
2. Journey
3. Sprint Objective
4. Problem
5. Solution
6. Product Overview
7. Product Benefit
8. Success Metrics
9. Next Steps

MEET OUR TEAM

Lucy Hansen

Anuj Mehta

Saranya Bhaskar

JOURNEY

JOURNEY

Stakeholder Interview

Empathize

Validate

Week 1

User Stories

Groom and Prioritize User Stories

Wireframe Mockups

Week 2

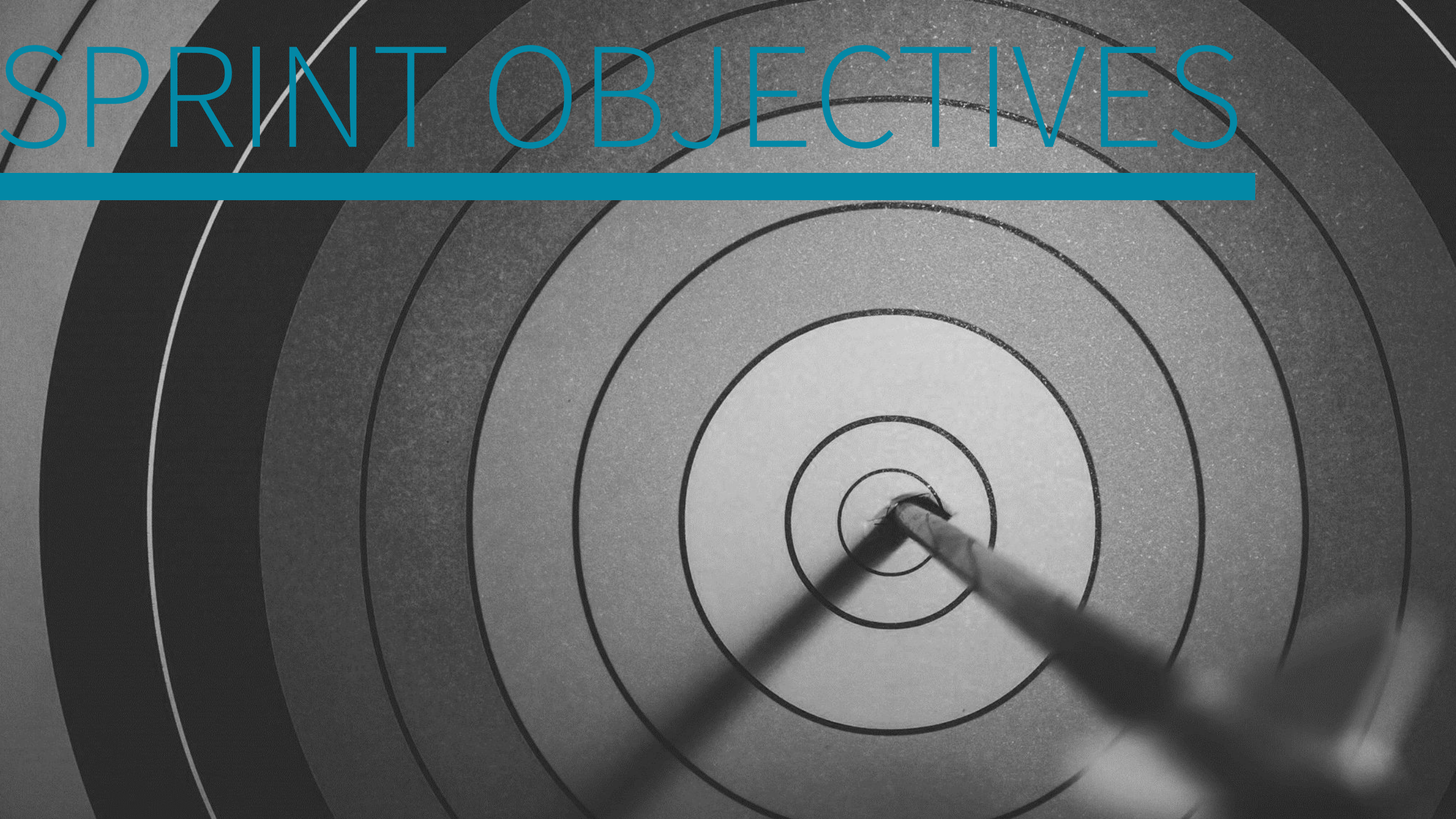
Dashboards & Reporting

Sprint Review

Feedback On Business Outcome

Week 3

SPRINT OBJECTIVES



SPRINT OBJECTIVE

Product

- Develop salesforce dashboard for curriculum administrators
- Develop salesforce dashboard for finance administrators

Stakeholders

- Make enrollment process seamless for students
- Make managing student waitlist easy for curriculum administrators
- Make financial reporting a breeze for finance administrators

Organization

- Increase the overall revenue earned through online course offerings
- Double ASU's online course offering while utilizing same personnel in the workforce

PROBLEM

PROBLEM

Manual Course Enrollment

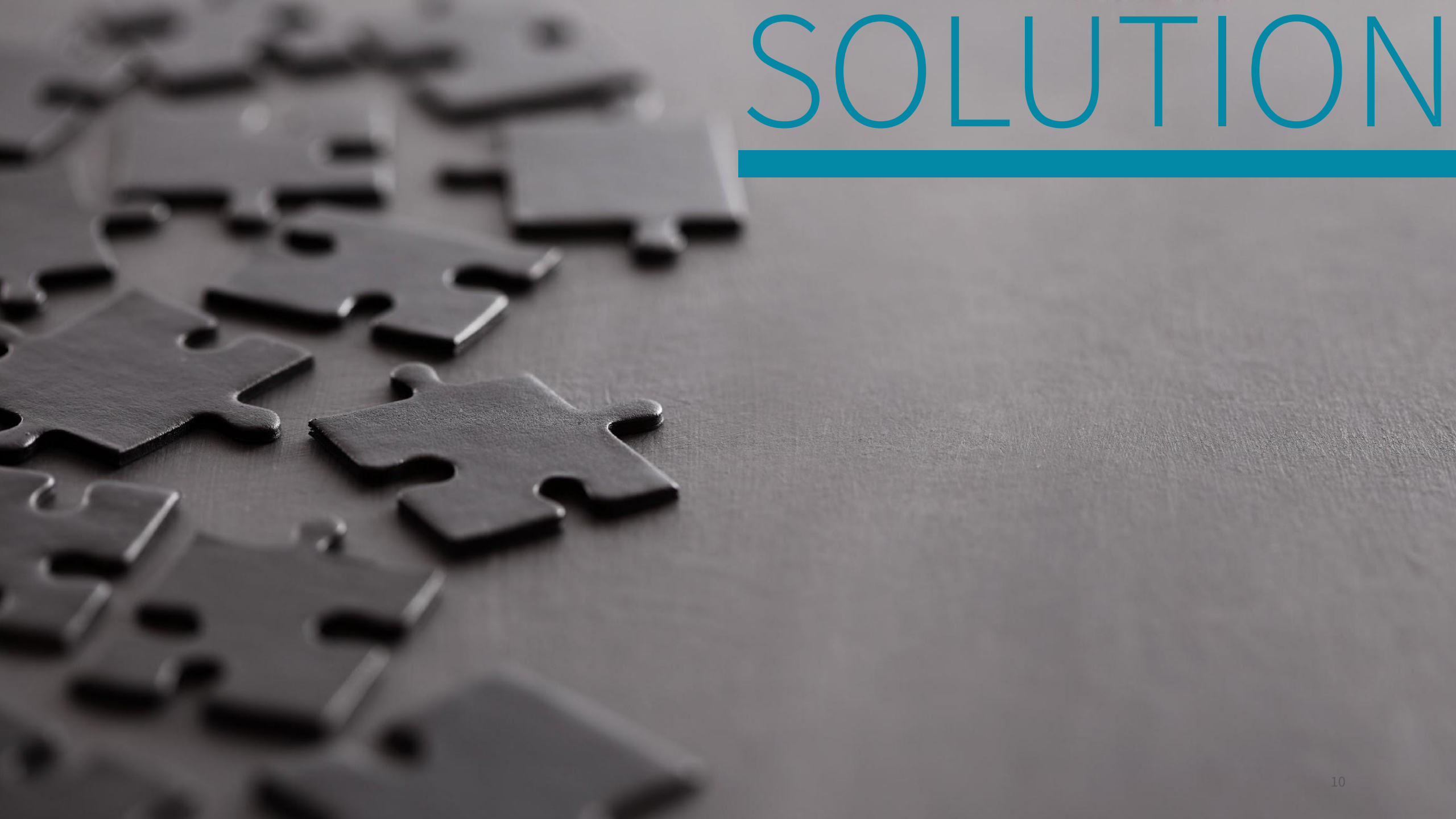
- Enrollment process currently handled manually with Google forms and spreadsheets
- Current enrollment process is labor intensive and difficult to scale

Waitlist Management

- Inefficient student waitlist management
- Cumbersome to validate & notify course waitlisted students

Financial Transparency

- Inability to view real-time status of payment & refund processing
- Real-time reporting of revenue - “Target Revenue Vs Actual Revenue”



SOLUTION

SOLUTION

Salesforce Course Enrollment Dashboards

Curriculum Enrollment Admin Dashboard

- Real time curriculum enrollment management
  - Course Status
  - Capacity Information
- Student Waitlist Management

Finance Admin Dashboard

- Student course transactions
  - Payment Processing
  - Refund Processing
- Report to monitor real time revenue data
  - Target Revenue Vs Actual Revenue

PRODUCT OVERVIEW

USER STORY - CURRICULUM ENROLLMENT

User Story # 1: Curriculum Manager Admin Dashboard

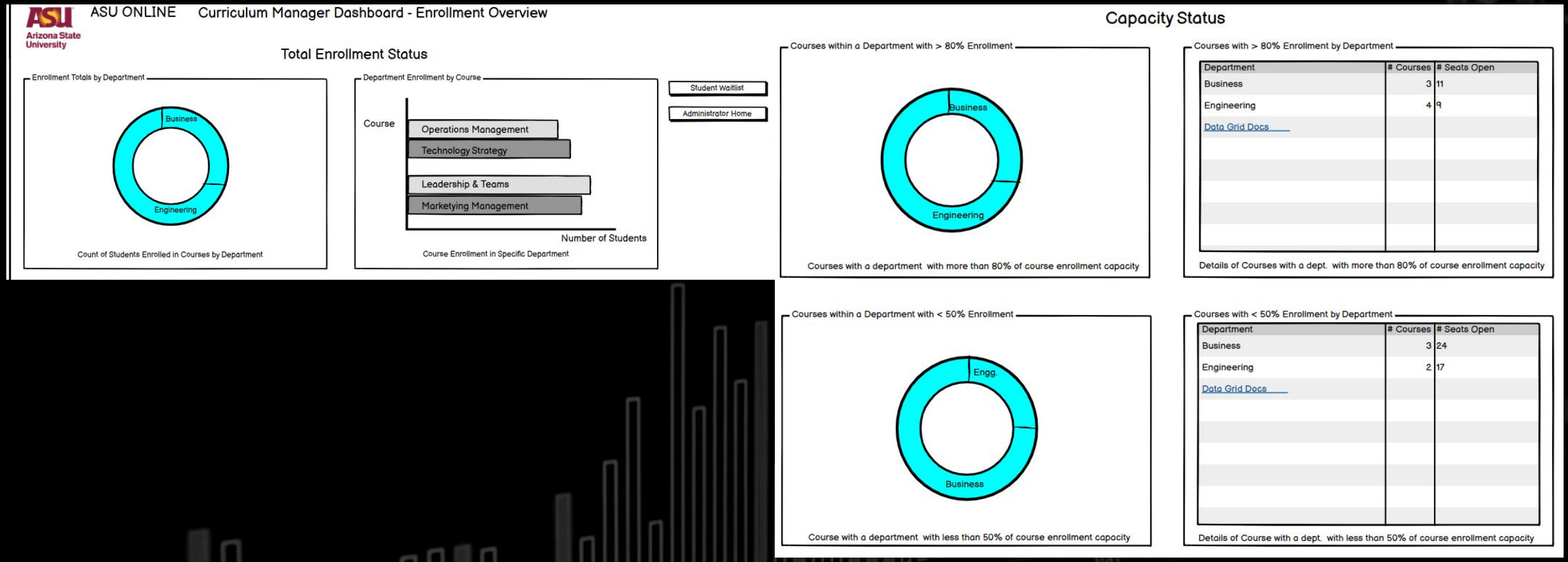
As a Curriculum Manager, I should be able to see the real-time status of seats booked against each course offered to make real-time decisions on closing the enrollment for a specific course or offering seats to students currently on waitlists.

Acceptance Criteria for User Story # 1: Curriculum Manager Admin Dashboard

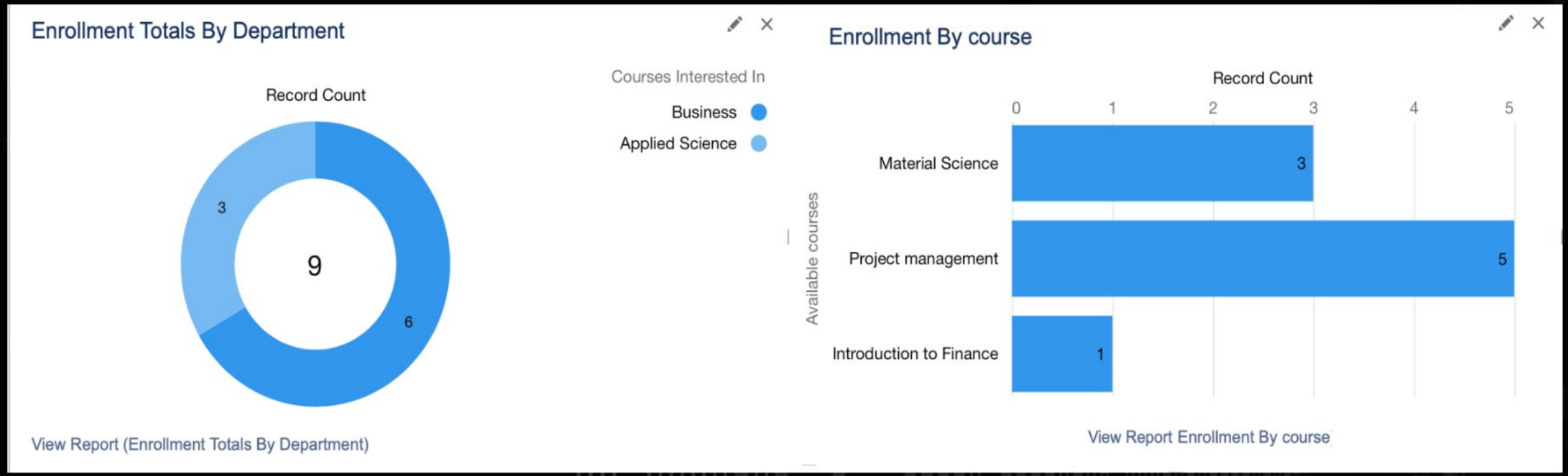
The Salesforce product provides visualizations/metrics on the dashboard, which is refreshed with real-time data from the Course Enrollment user interface(UX/CX) to display the following:

- Total Course Capacity for Each Course
- Current Enrollment Status for each course
  - Dashboard metric to display courses > 80% of capacity
  - Dashboard metric to display courses <50% of capacity
- Current total waitlist number for each course
  - With the ability to see/drill down the details of each student who is currently on the waitlist

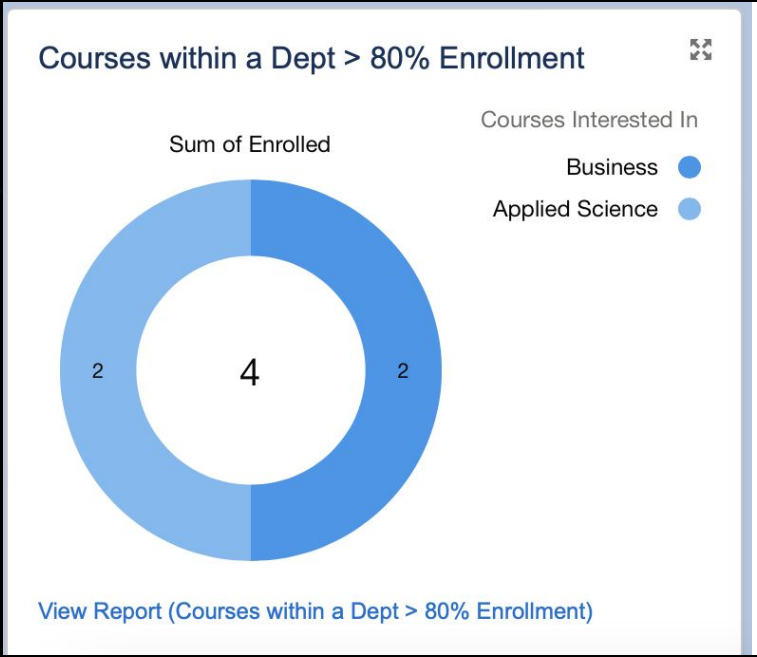
MOCKUP - CURRICULUM DASHBOARD



TOTAL ENROLLMENT STATUS



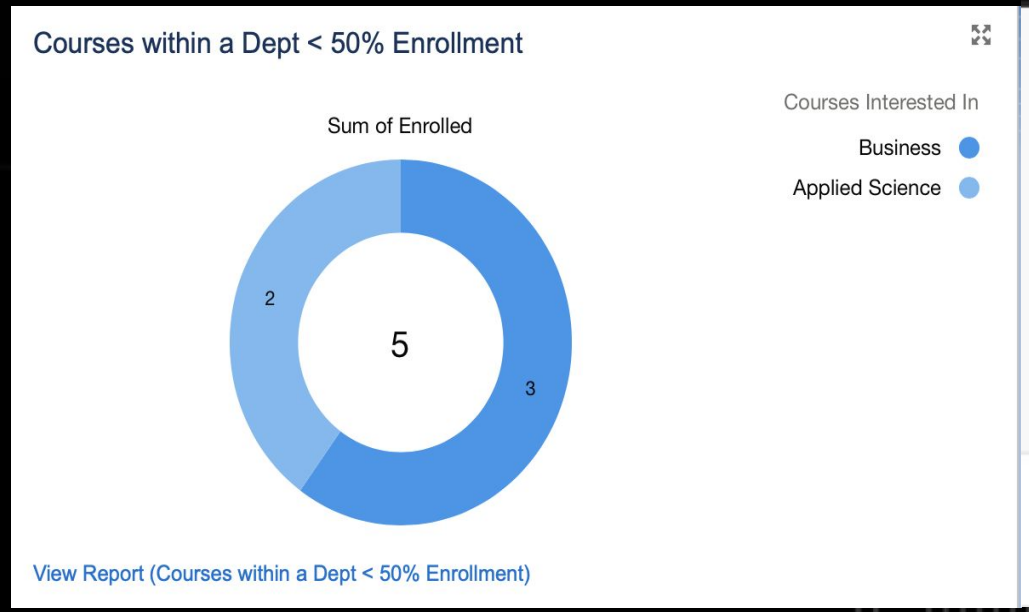
CAPACITY STATUS > 80%



Courses with > 80% Enrollment by Department

Course Name	Number of Students
Project Management	1
Introduction to Finance	1
Material Science	1
BioTechnology	1

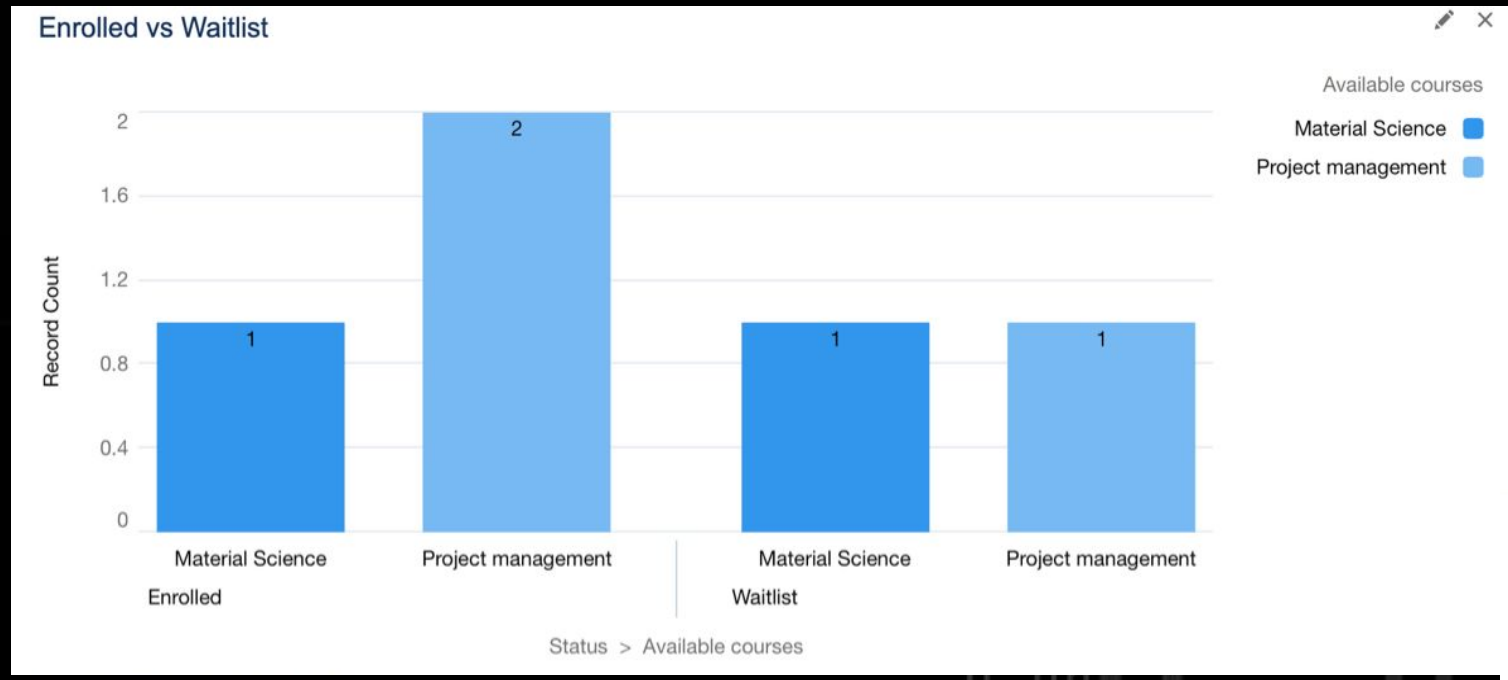
CAPACITY STATUS < 50%

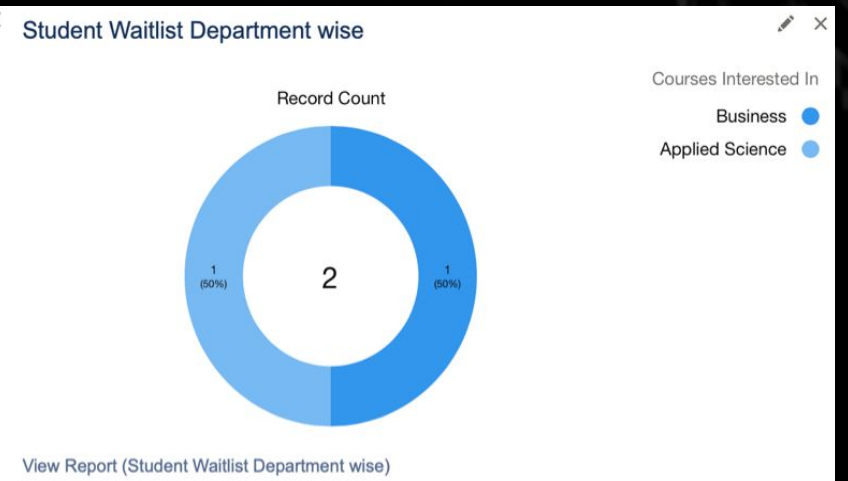


Courses with <50% Enrollment by Department

Course Name	Number of Students
Operations Management	2
Technology Strategy	1
LeaderShip & Teams	4
Marketing Managements	3

WAITLIST STATUS





USER STORY - FINANCE ADMINISTRATION

User Story # 3: Finance User Dashboard (Revised User Story) - Sizing via Planning Poker

As a Finance Team member, I should see the real-time details of the following course enrollment activities:

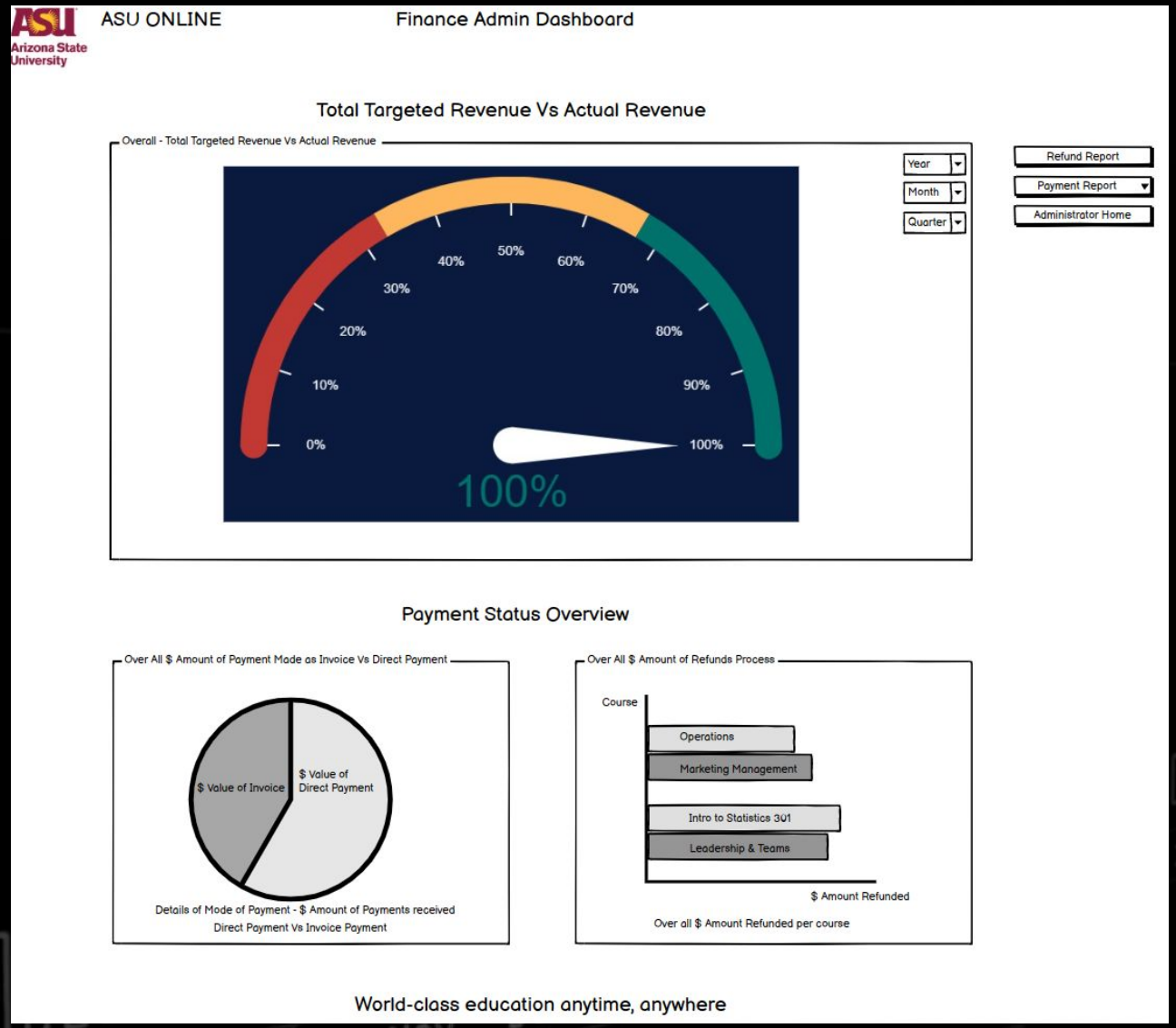
- The total dollar amount of payments completed by the students
- **Payment Received Vs. Invoice generated** (Payments awaited - Accounts Receivable)
- Total dollar amount **refunded to students** as a result of withdrawal from enrollment
- Total number of students who have opted for invoice generation as their choice of payment
- Revenue target details: "**Total targeted revenue" Vs. "Actual Revenue**"

The information above would help me to sign off/validate the completeness and accuracy of the reports generated from the financial legacy system.

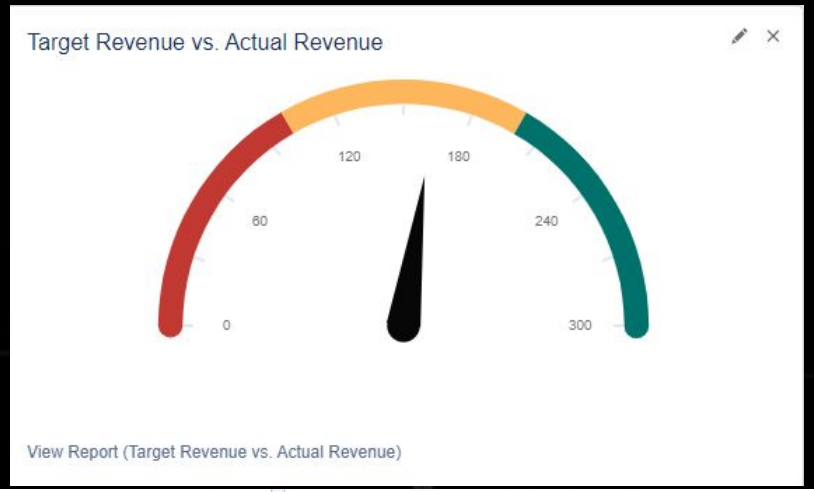
Acceptance Criteria for User Story # 3: Finance User Dashboard (Revised Acceptance Criteria)

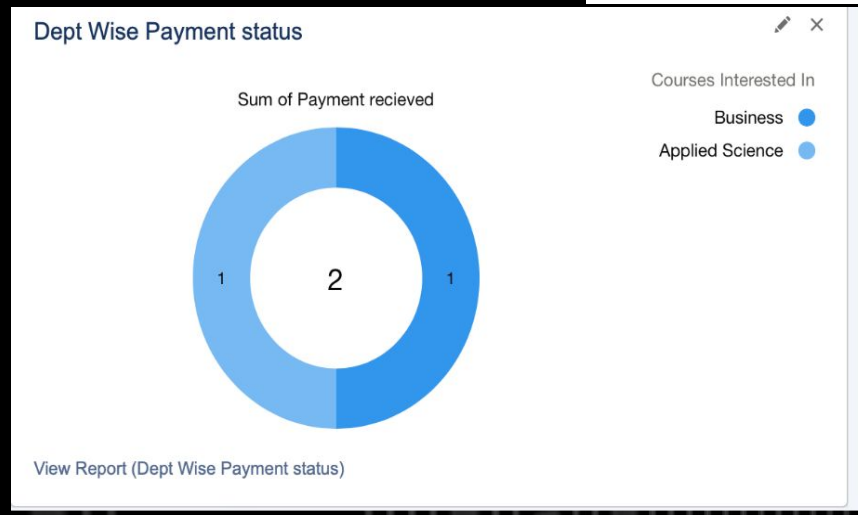
- The Salesforce product provides a visualization/metric on the dashboard for the following:
  - Dashboard Provides breakdown/details of **Payment Received Vs. Invoice** generated
  - The total dollar amount of payments completed by the students
- The Dashboard provides insights by displaying visualizations about the following:
  - Total count of refunds requested
    - Total count of students who requested a refund
    - Breakdown of total count by each field of study
      [For Example, Business Courses, Engineering Courses, Applied Science Courses, etc.]
    - Breakdown of total count by each course
      [Course level details examples may be Operations Management, Introduction to Finance, Technology Strategy, etc.]
  - Total Course fee refunds, i.e., the dollar value
    - The total Dollar amount of refund requested by students, i.e., the sum of all refunds
    - The breakdown dollar amount of refund by each field of study
      [For Example, Business Courses, Engineering Courses, Applied Science Courses, etc.]
    - The Breakdown of the total dollar amount of refund by each course
      [Course level details examples may be Operations Management, Introduction to Finance, Technology Strategy, etc.]
- The dashboard should provide visualization to help finance users understand the following:
  - "**Total targeted revenue." Vs. "Actual Revenue**, i.e., the sum of all Dollar amount Payment completed for all courses + sum of all Invoices received"

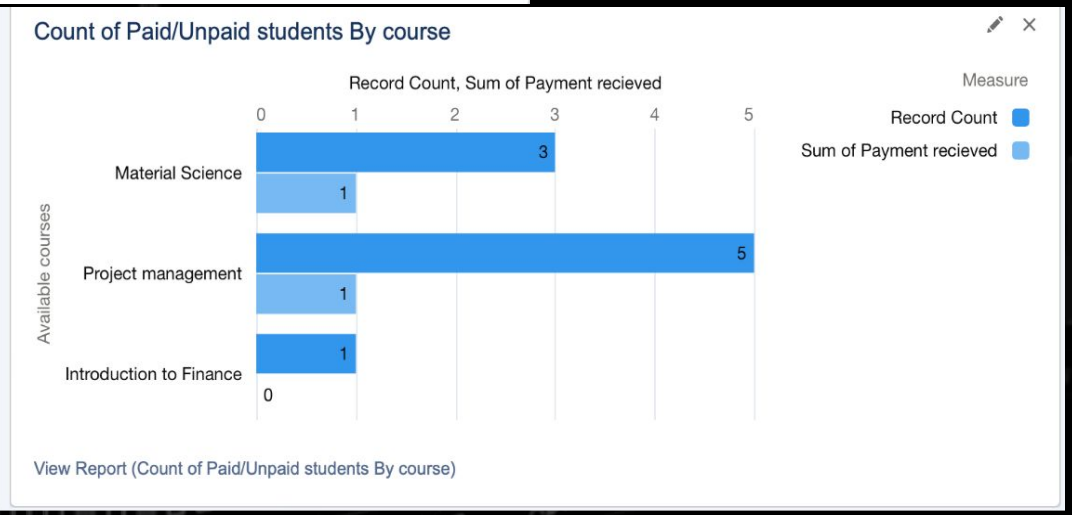
MOCKUP - FINANCE ADMIN DASHBOARD



FINANCE ADMIN DASHBOARD







PRODUCT BENEFITS

PRODUCT BENEFITS

Salesforce

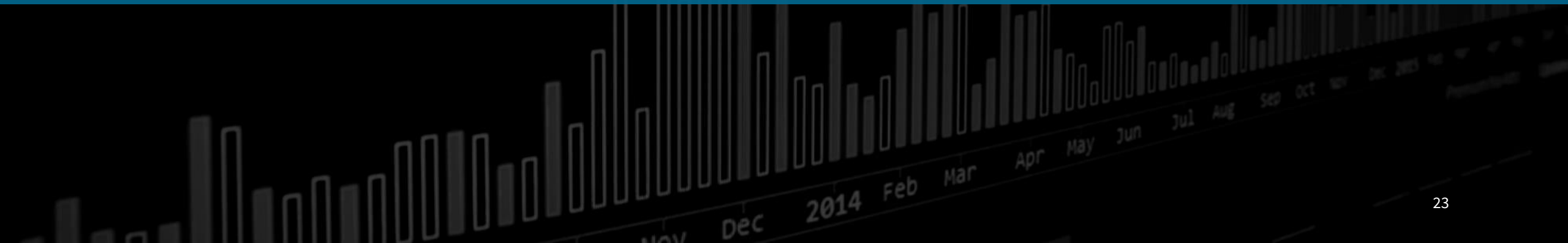
- Leverages cutting edge features of Salesforce ecosystem

Training

- Teamless end user training
- Access to Salesforce Partner Alliance

Analytics

- Salesforce native dashboard and reporting with option to leverage Tableau
- Leap forward with Einstein GPT



SUCCESS METRICS

SUCCESS METRICS

Product

Reporting Dashboard in Salesforce

- Salesforce dashboards with interactive visuals to represent real-time student enrollment data
- Salesforce dashboards with ability to provide information at required level of granularity to finance team

Stakeholders

Curriculum Enrollment Administrators

- Improved student enrollment process
- Streamlined course management and waitlist management

Finance Administrators

- Accurate Refund & Payments
- Improved Financial Reporting

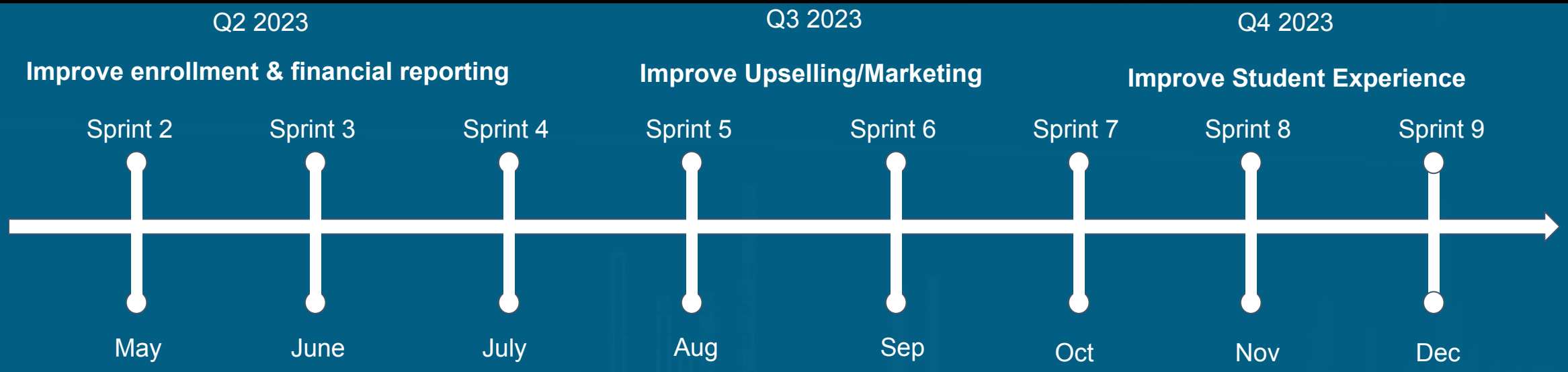
Organization

Arizona State University

- Increase in student enrollment number in the offered courses
- Increase in the number of course offered online by ASU
- Increase in the top line revenue contribution by courses offered at ASU online

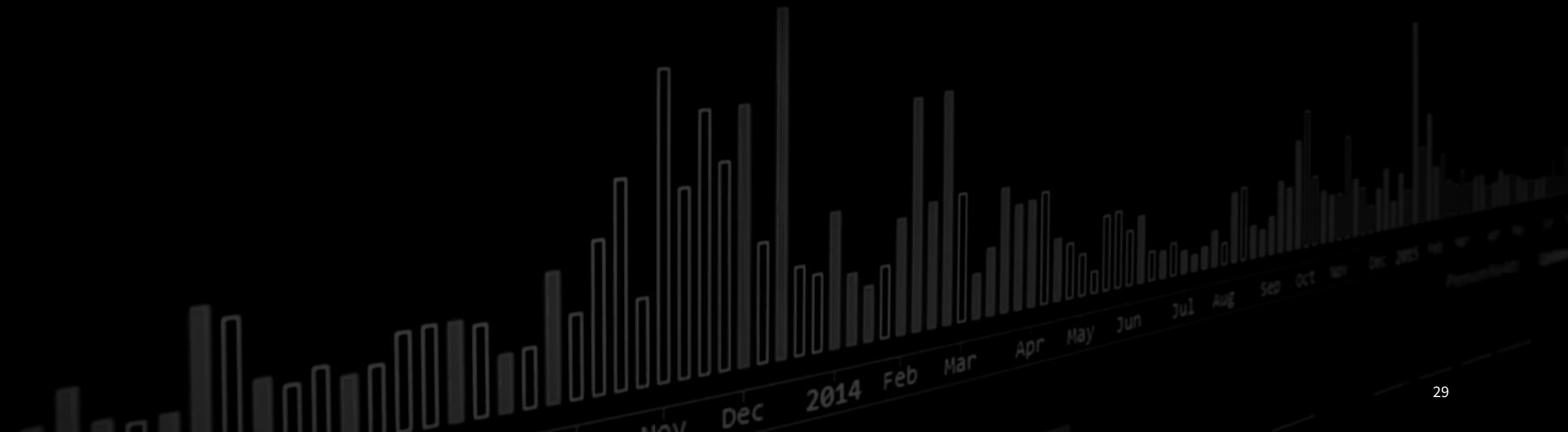
NEXT STEPS

NEXT STEPS


Q2 2023
Improve enrollment & financial reporting
Q3 2023
Improve Upselling/Marketing
Q4 2023
Improve Student Experience
Sprint 2
Sprint 3
Sprint 4
Sprint 5
Sprint 6
Sprint 7
Sprint 8
Sprint 9
May
June
July
Aug
Sep
Oct
Nov
Dec

THANK YOU

APPENDIX



USER STORIES

User Story # 1: Curriculum Manager Admin Dashboard

As a Curriculum Manager, I should be able to see the real-time status of seats booked against each course offered to make real-time decisions on closing the enrollment for a specific course or offering seats to students currently on waitlists.

Acceptance Criteria for User Story # 1: Curriculum Manager Admin Dashboard

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- Current Enrollment Status for each course
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  - Dashboard metric to display courses <50% of capacity
- Current total waitlist number for each course
  - With the ability to see/drill down the details of each student who is currently on the waitlist

USER STORIES

Acceptance Criteria for User Story # 2: Curriculum Manager Admin Dashboard

- The Salesforce product provides means (action/button/link) on the waitlist details report to move students from the waitlist back to the enrollment stage.
- The Salesforce product provides an option for the curriculum manager to trigger a notification to the student with a custom **call to action**.

  *[Example: Curriculum admin manager should be able to send a notification saying the student is now moved into the enrollment stage from the current waitlist and Payments need to be completed within **x** days to confirm the seat]*

  *[On receiving notification, the Student needs to complete payment within **x** days for enrollment to be confirmed]*

- On successful completion of payment, the Curriculum Manager admin dashboard displays the following information:
  - Triggers successful payment by student notification to the curriculum manager
  - As a result of the above action, The dashboard updates the information on the following:
    - Updates waitlist list to reflect new status - Remove the name of a student recently enrolled from the waitlist
    - Updates the student name in the list of students who have withdrawn from a course
    - Updates the course status with real-time data and add the name of the student to the list of student enrolled for the course

      [If the course is at its full capacity, the "count of students enrolled for the course" should remain unchanged because one student was replaced by the other, But details will show the name of the student in the enrolled list instead of the waitlist]

USER STORIES

User Story # 3: Finance User Dashboard (Revised User Story) - Sizing via Planning Poker

As a Finance Team member, I should see the real-time details of the following course enrollment activities:

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USER STORIES

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WIREFRAMES

ASU ONLINE

Arizona State University

Request Information (Step 1 of 2))

Department of Interest

Applied Sciences

Available Courses

Available courses

Course Status

Available

Complete Payment

World-class education anytime, anywhere

WIREFRAMES

ASU ONLINE

Arizona State University

Request Information (Step 2 of 2))

Student Information

First Name

Last Name

Email Address

Phone # (With Country Code)

Payment Option

Credit Card Details

Payment Invoice

Name on Card

Credit Card #

Secutity Code

Exp Date

OR

Send Payment Invoice

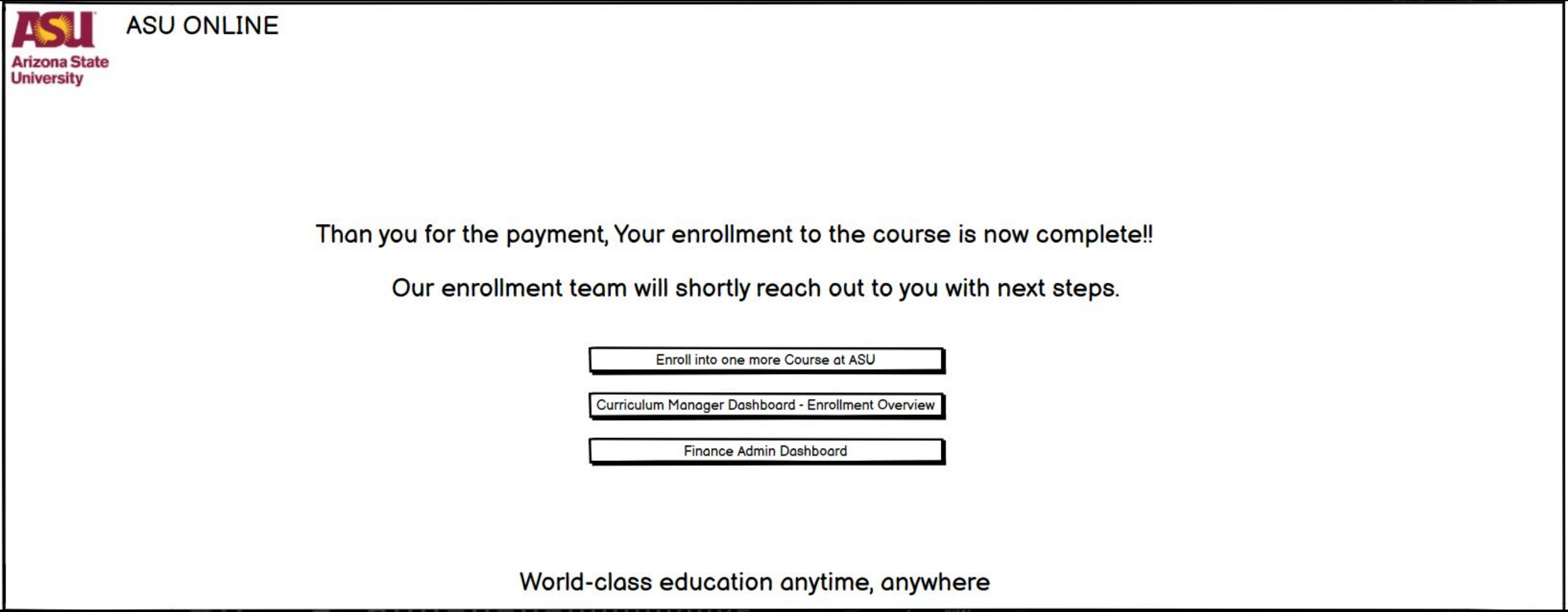
Submit Credit Card Payment

Submit Payment Invoice

Back to Step 1

World-class education anytime, anywhere

WIREFRAMES


ASU ONLINE
Arizona State University
Than you for the payment, Your enrollment to the course is now complete!!
Our enrollment team will shortly reach out to you with next steps.
Enroll into one more Course at ASU
Curriculum Manager Dashboard - Enrollment Overview
Finance Admin Dashboard
World-class education anytime, anywhere

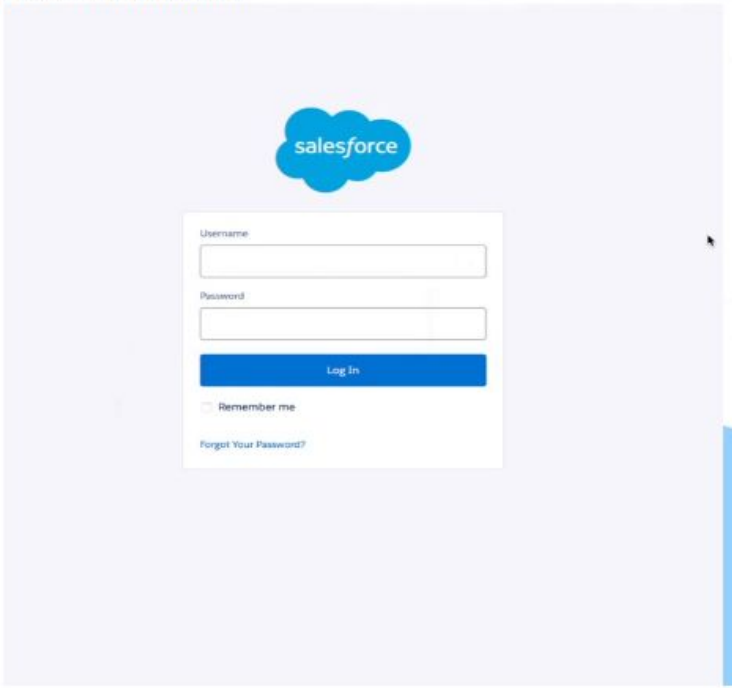
WIREFRAMES

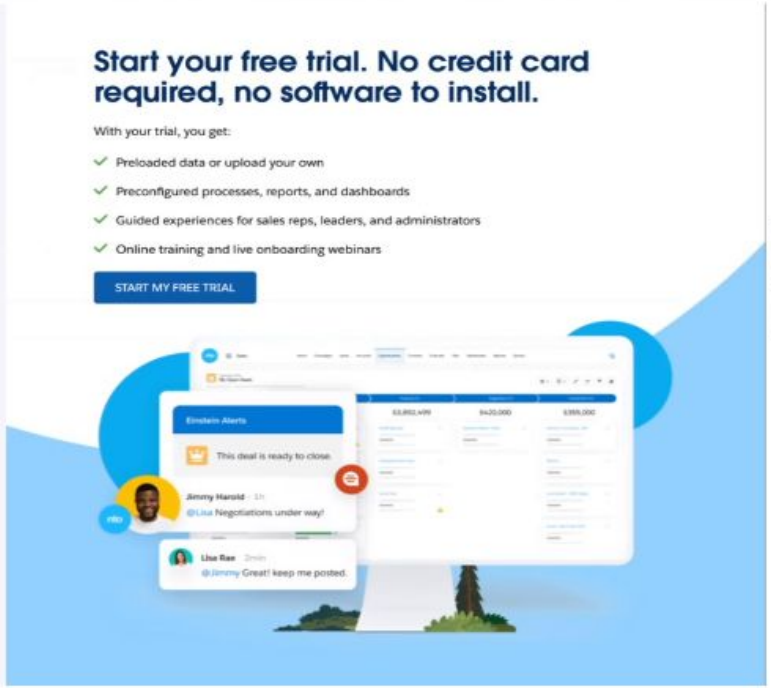
ASU ONLINE

Arizona State University

ADMINISTRATOR PORTAL USER AUTHENTICATION

Admin User Authentication





Curriculum Manager Dashboard - Enrollment Overview

Curriculum Admin Dashboard - Student Waitlist

Finance Admin Dashboard

Finance Payment Report

Finance Refund Report

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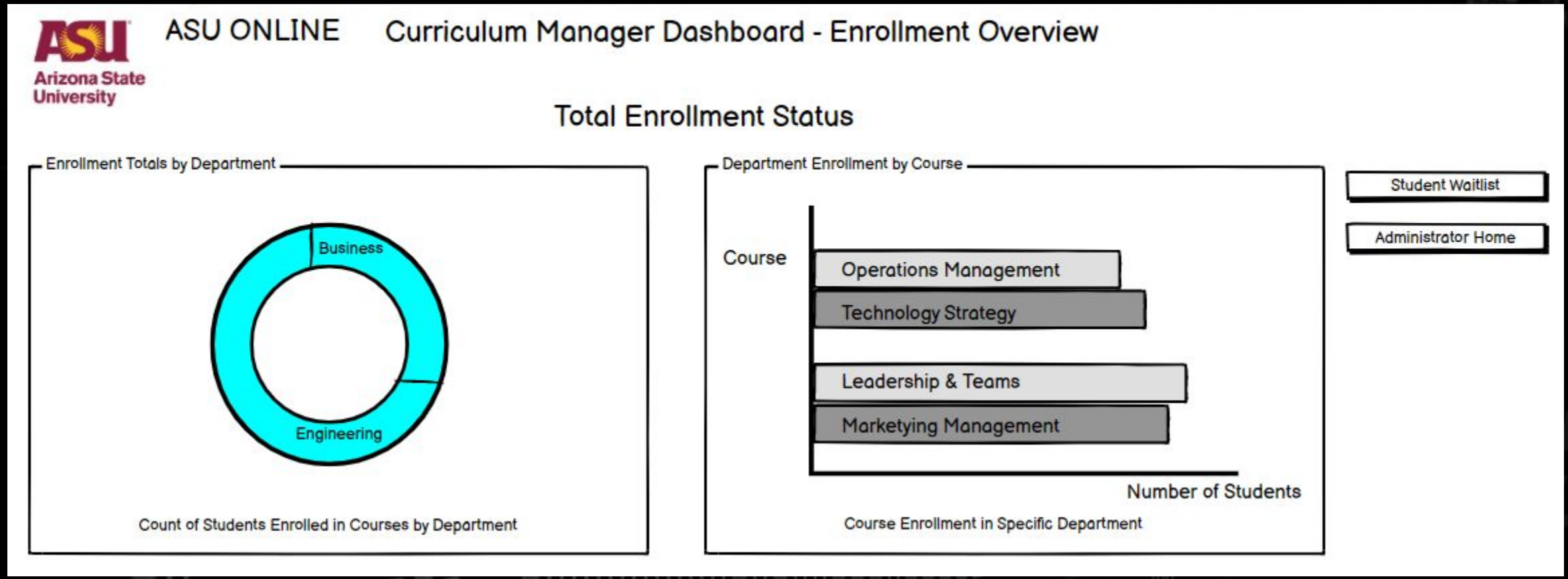
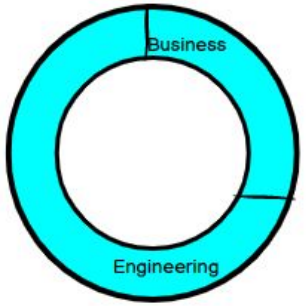
WIREFRAMES


ASU ONLINE
Curriculum Manager Dashboard - Enrollment Overview
Arizona State University
Total Enrollment Status
Enrollment Totals by Department
Business
Engineering
Count of Students Enrolled in Courses by Department
Department Enrollment by Course
Course
Operations Management
Technology Strategy
Leadership & Teams
Marketying Management
Number of Students
Course Enrollment in Specific Department
Student Waitlist
Administrator Home

WIREFRAMES

Capacity Status

Courses within a Department with > 80% Enrollment



Courses with a department with more than 80% of course enrollment capacity

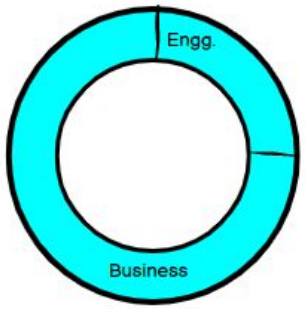
Courses with > 80% Enrollment by Department

Department	# Courses	# Seats Open
Business	3	11
Engineering	4	9

Data Grid Docs

Details of Courses with a dept. with more than 80% of course enrollment capacity

Courses within a Department with < 50% Enrollment



Course with a department with less than 50% of course enrollment capacity

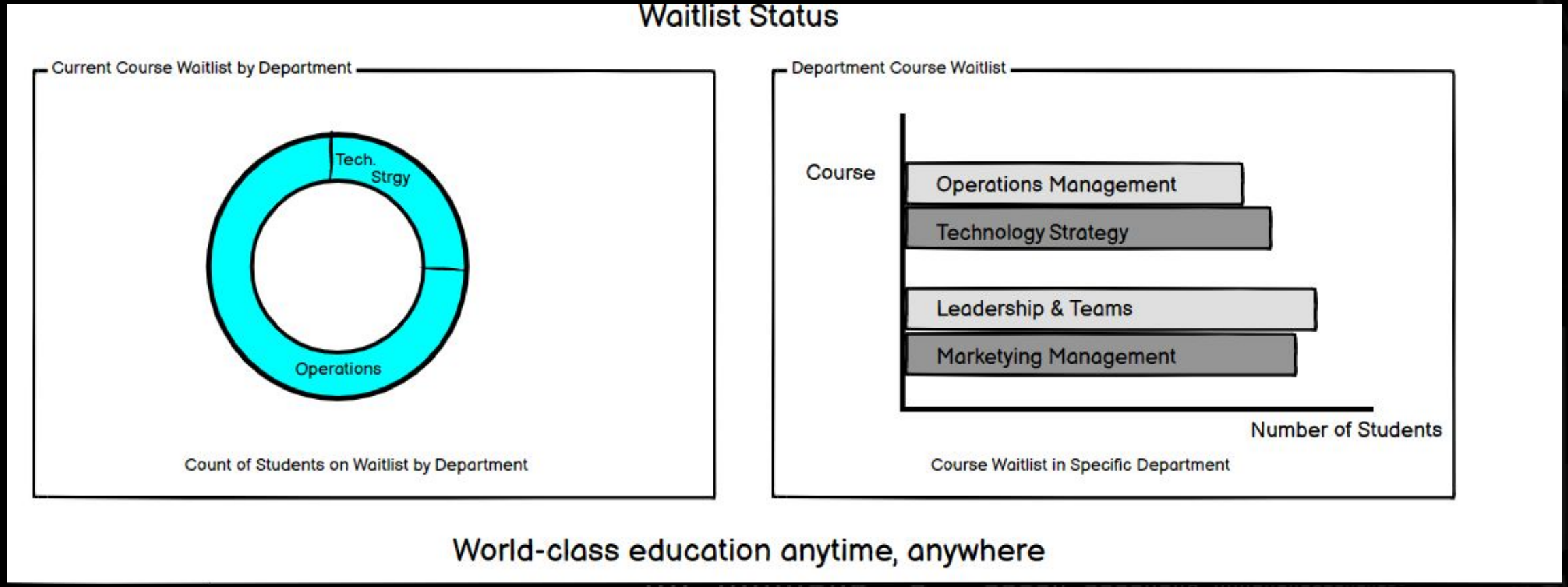
Courses with < 50% Enrollment by Department

Department	# Courses	# Seats Open
Business	3	24
Engineering	2	17

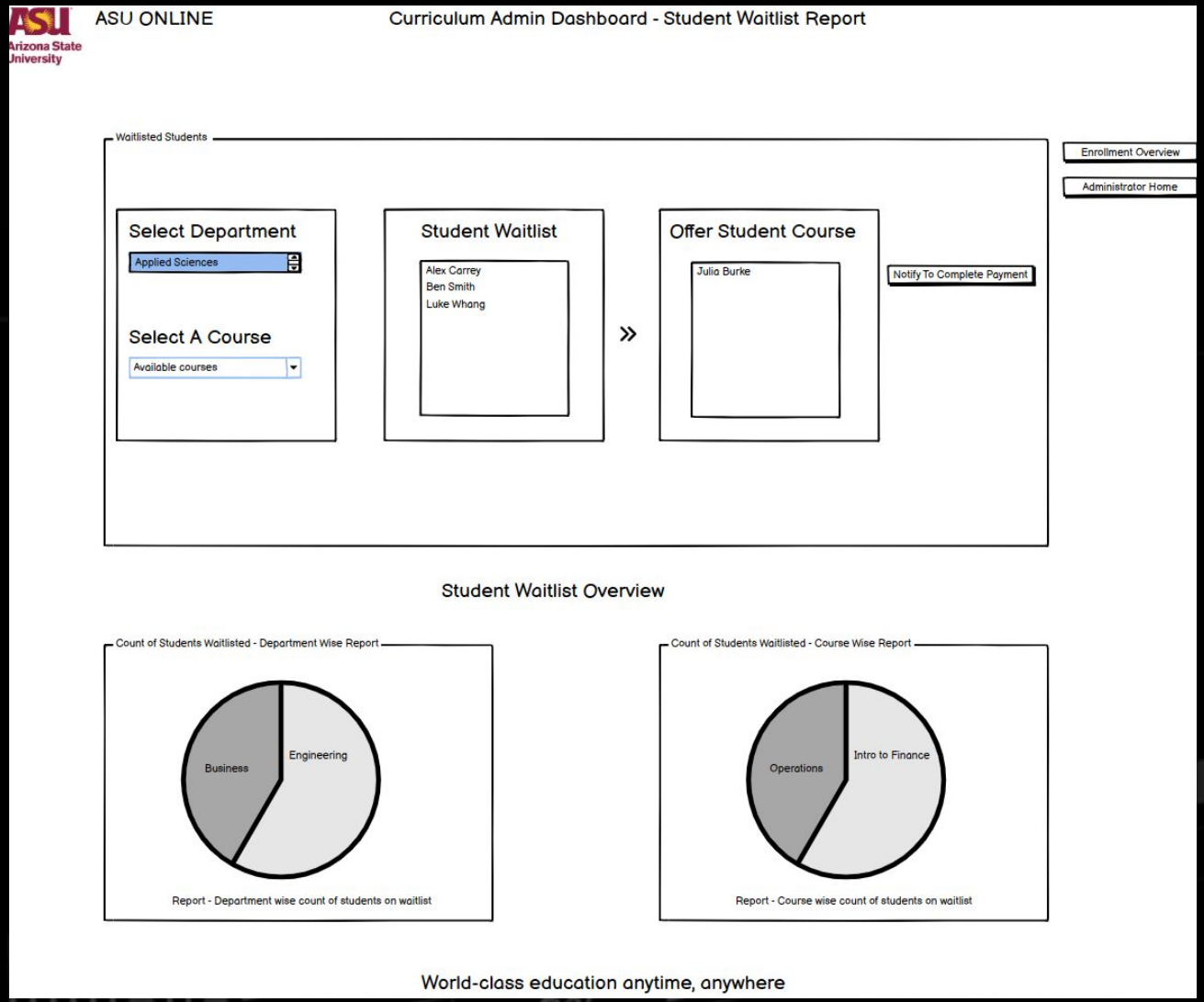
Data Grid Docs

Details of Course with a dept. with less than 50% of course enrollment capacity

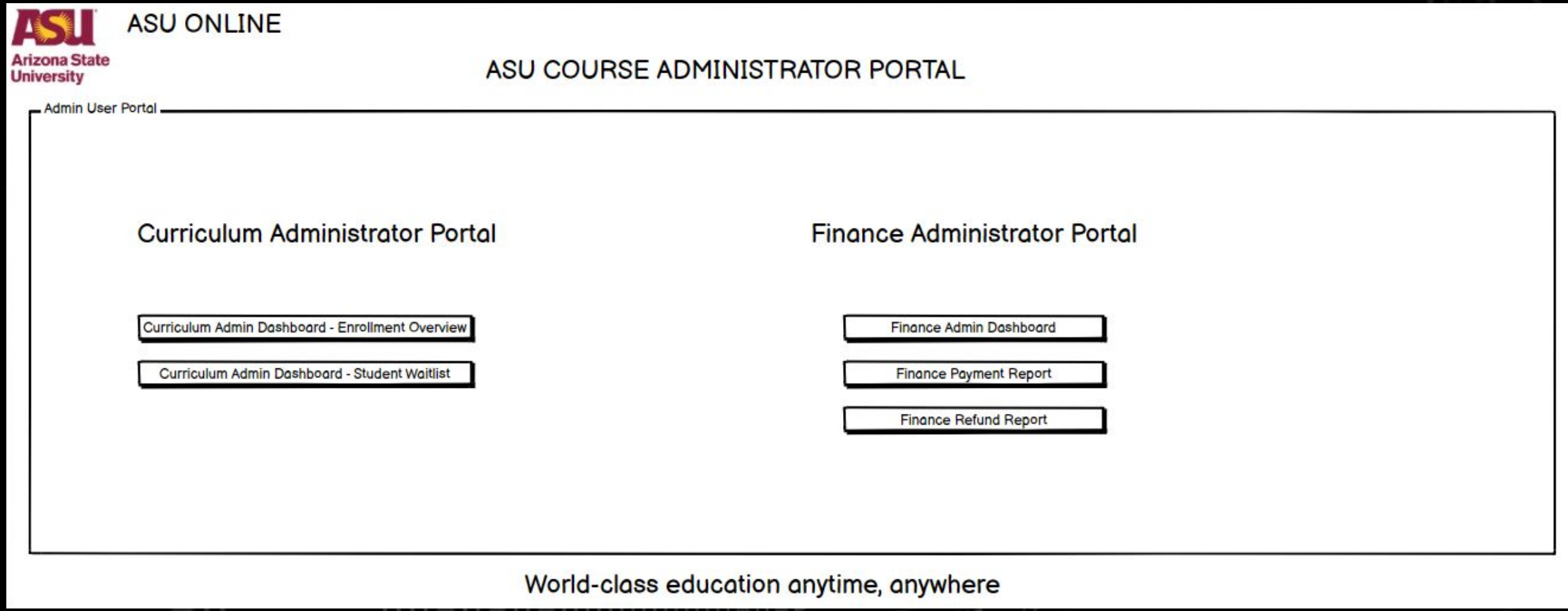
WIREFRAMES


Waitlist Status
Current Course Waitlist by Department
Tech.
Strgy
Operations
Count of Students on Waitlist by Department
Department Course Waitlist
Course
Operations Management
Technology Strategy
Leadership & Teams
Marketying Management
Number of Students
Course Waitlist in Specific Department
World-class education anytime, anywhere

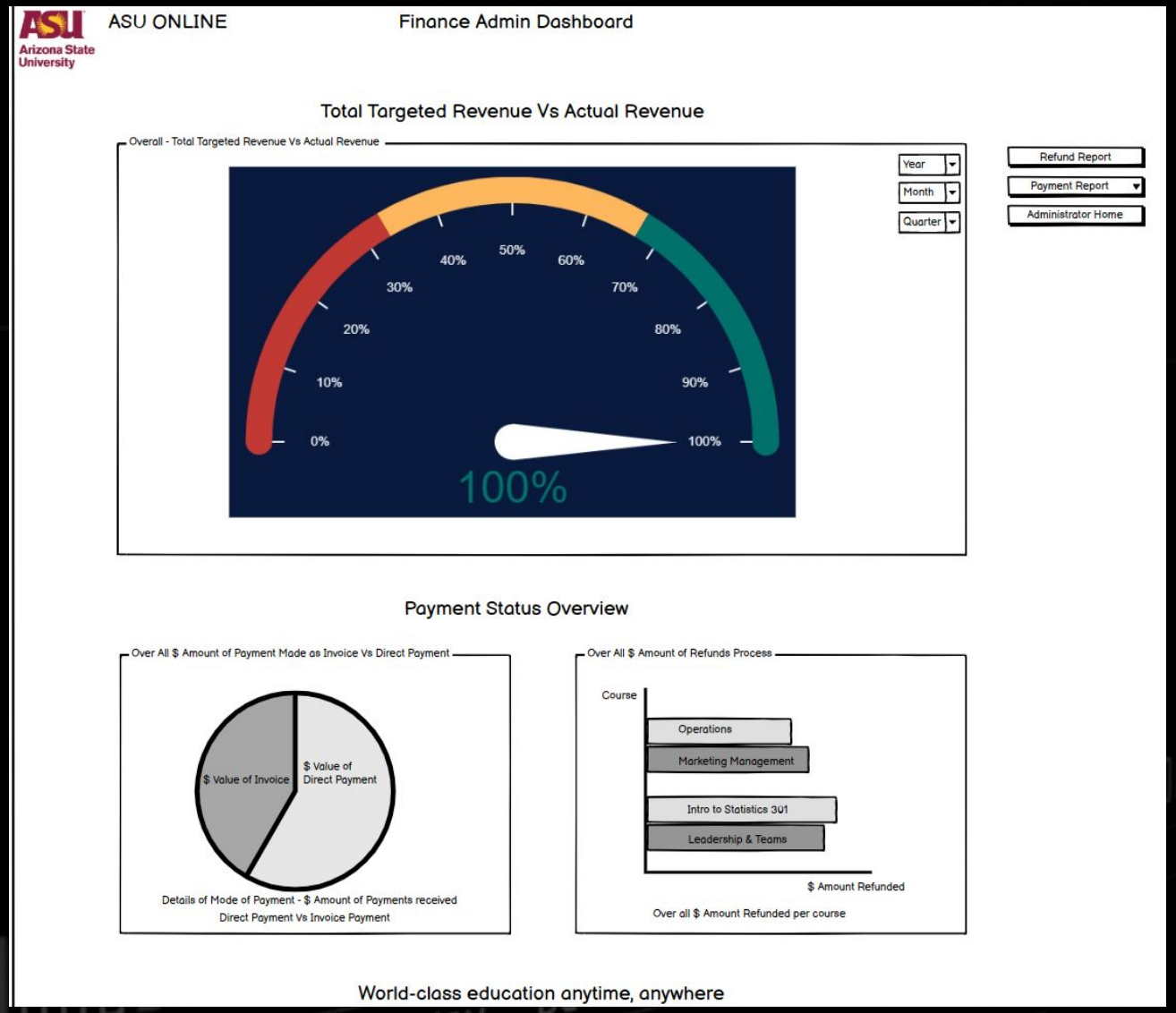
WIREFRAMES


ASU ONLINE
Curriculum Admin Dashboard - Student Waitlist Report
Waitlisted Students
Enrollment Overview
Administrator Home
Select Department
Applied Sciences
Select A Course
Available courses
Student Waitlist
Alex Carrey
Ben Smith
Luke Whang
Offer Student Course
Julia Burke
Notify To Complete Payment
Student Waitlist Overview
Count of Students Waitlisted - Department Wise Report
Business
Engineering
Report - Department wise count of students on waitlist
Count of Students Waitlisted - Course Wise Report
Operations
Intro to Finance
Report - Course wise count of students on waitlist
World-class education anytime, anywhere

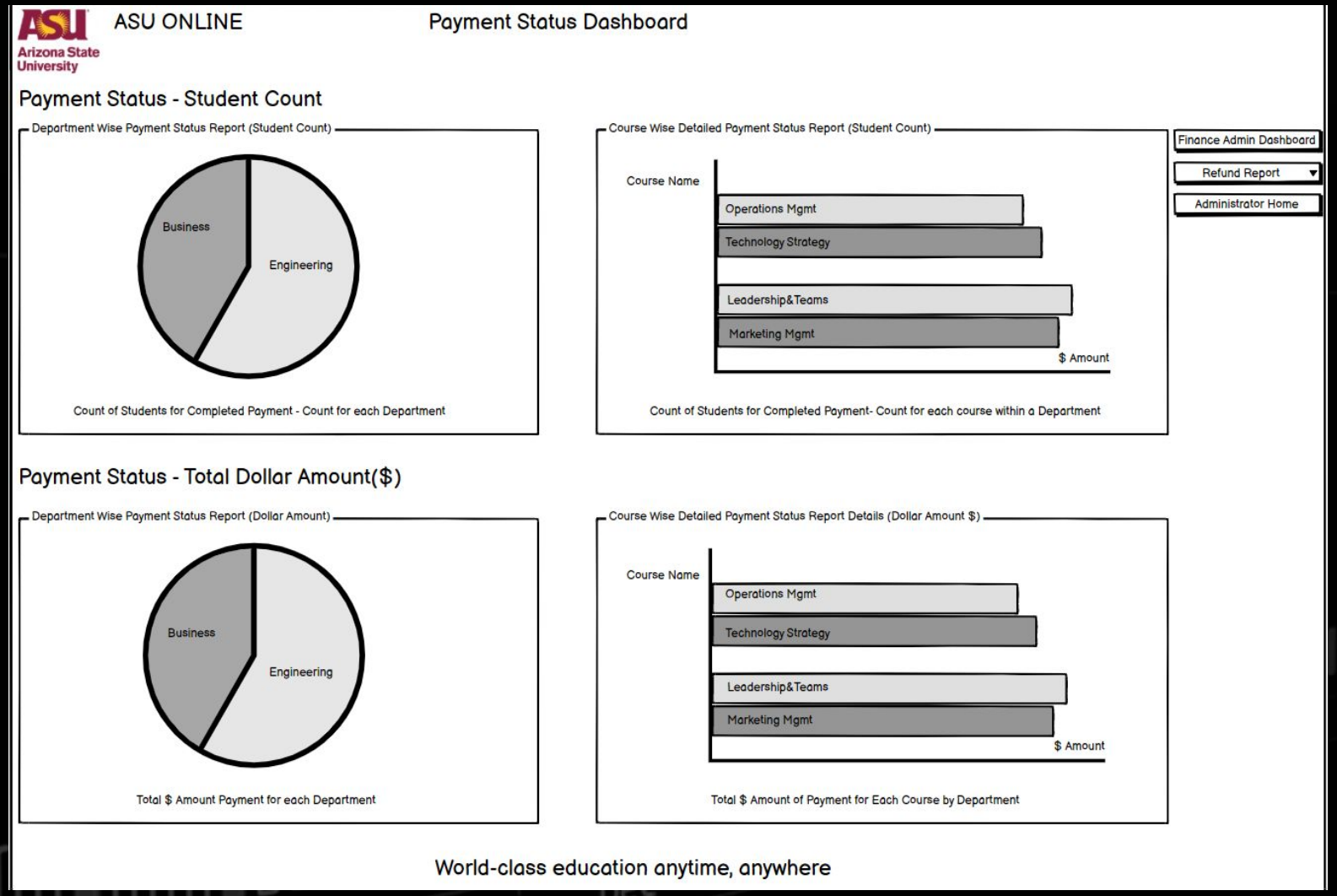
WIREFRAMES


ASU ONLINE
Arizona State University
ASU COURSE ADMINISTRATOR PORTAL
Admin User Portal
Curriculum Administrator Portal
Curriculum Admin Dashboard - Enrollment Overview
Curriculum Admin Dashboard - Student Waitlist
Finance Administrator Portal
Finance Admin Dashboard
Finance Payment Report
Finance Refund Report
World-class education anytime, anywhere

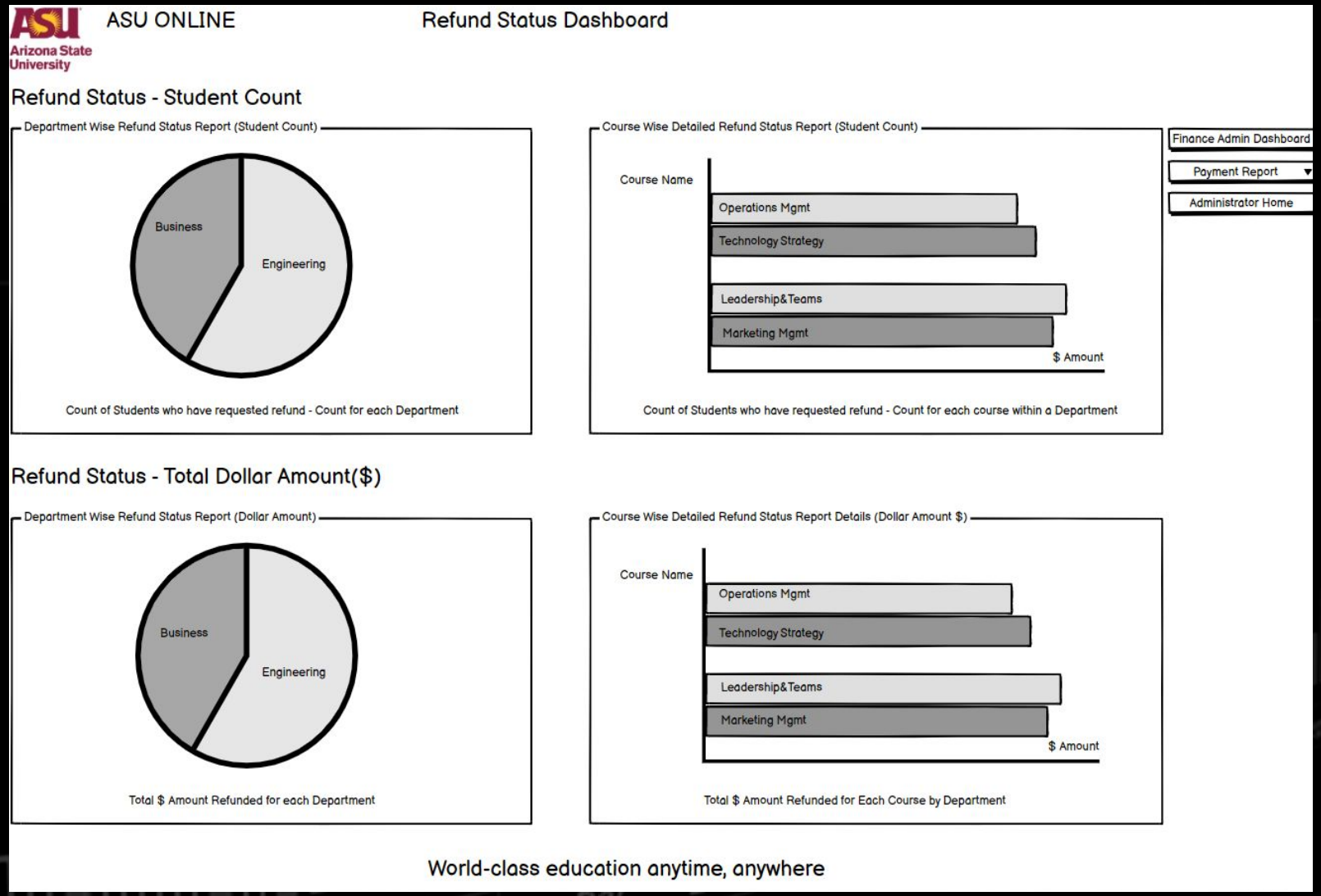
WIREFRAMES


ASU ONLINE
Finance Admin Dashboard
Total Targeted Revenue Vs Actual Revenue
Overall - Total Targeted Revenue Vs Actual Revenue
Year
Month
Quarter
Refund Report
Payment Report
Administrator Home
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
100%
Payment Status Overview
Over All $ Amount of Payment Made as Invoice Vs Direct Payment
$ Value of Invoice
$ Value of Direct Payment
Details of Mode of Payment - $ Amount of Payments received
Direct Payment Vs Invoice Payment
Over All $ Amount of Refunds Process
Course
Operations
Marketing Management
Intro to Statistics 301
Leadership & Teams
$ Amount Refunded
Over all $ Amount Refunded per course
World-class education anytime, anywhere

WIREFRAMES


ASU ONLINE
Arizona State University
Payment Status Dashboard
Payment Status - Student Count
Department Wise Payment Status Report (Student Count)
Business
Engineering
Count of Students for Completed Payment - Count for each Department
Course Wise Detailed Payment Status Report (Student Count)
Course Name
Operations Mgmt
Technology Strategy
Leadership&Teams
Marketing Mgmt
$ Amount
Count of Students for Completed Payment- Count for each course within a Department
Finance Admin Dashboard
Refund Report
Administrator Home
Payment Status - Total Dollar Amount($)
Department Wise Payment Status Report (Dollar Amount)
Business
Engineering
Total $ Amount Payment for each Department
Course Wise Detailed Payment Status Report Details (Dollar Amount $)
Course Name
Operations Mgmt
Technology Strategy
Leadership&Teams
Marketing Mgmt
$ Amount
Total $ Amount of Payment for Each Course by Department
World-class education anytime, anywhere

WIREFRAMES


ASU ONLINE
Arizona State University
Refund Status Dashboard
Refund Status - Student Count
Department Wise Refund Status Report (Student Count)
Business
Engineering
Count of Students who have requested refund - Count for each Department
Course Wise Detailed Refund Status Report (Student Count)
Course Name
Operations Mgmt
Technology Strategy
Leadership&Teams
Marketing Mgmt
$ Amount
Count of Students who have requested refund - Count for each course within a Department
Finance Admin Dashboard
Payment Report
Administrator Home
Refund Status - Total Dollar Amount($)
Department Wise Refund Status Report (Dollar Amount)
Business
Engineering
Total $ Amount Refunded for each Department
Course Wise Detailed Refund Status Report Details (Dollar Amount $)
Course Name
Operations Mgmt
Technology Strategy
Leadership&Teams
Marketing Mgmt
$ Amount
Total $ Amount Refunded for Each Course by Department
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