



Higher Education Enrollment Portal

Revenue Operations & Enrollment

A faint, stylized background chart is visible, consisting of a series of vertical bars of varying heights and a line graph that trends downwards from the top right towards the bottom right. The x-axis of the chart is labeled with months and years, including 'NOV', 'Dec', '2014', 'Feb', 'Mar', 'Apr', 'May', 'Jun', 'Jul', 'Aug', 'Sep', 'Oct', and 'Nov'.

Anuj Mehta

AGENDA

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

JOURNEY



JOURNEY

Stakeholder Interview

Empathize

Validate



User Stories

Groom and Prioritize User Stories

Wireframe Mockups



Dashboards & Reporting

Sprint Review

Feedback On Business Outcome

Week 1

Week 2

Week 3

SPRINT OBJECTIVES

The background of the slide features a target with concentric circles on a textured, brownish surface. A hand is visible in the lower right, holding a pencil and pointing it directly at the center bullseye. A solid blue horizontal bar is positioned below the title text. On the right side of the slide, there is a vertical teal bar.

SPRINT OBJECTIVE

Product	Stakeholders	Organization
<ul style="list-style-type: none">• Develop salesforce dashboard for curriculum administrators• Develop salesforce dashboard for finance administrators	<ul style="list-style-type: none">• Make enrollment process seamless for students• Make managing student waitlist easy for curriculum administrators• Make financial reporting a breeze for finance administrators	<ul style="list-style-type: none">• Increase the overall revenue earned through online course offerings• Double ASU's online course offering while utilizing same personnel in the workforce

PROBLEM

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PROBLEM

Manual Course Enrollment

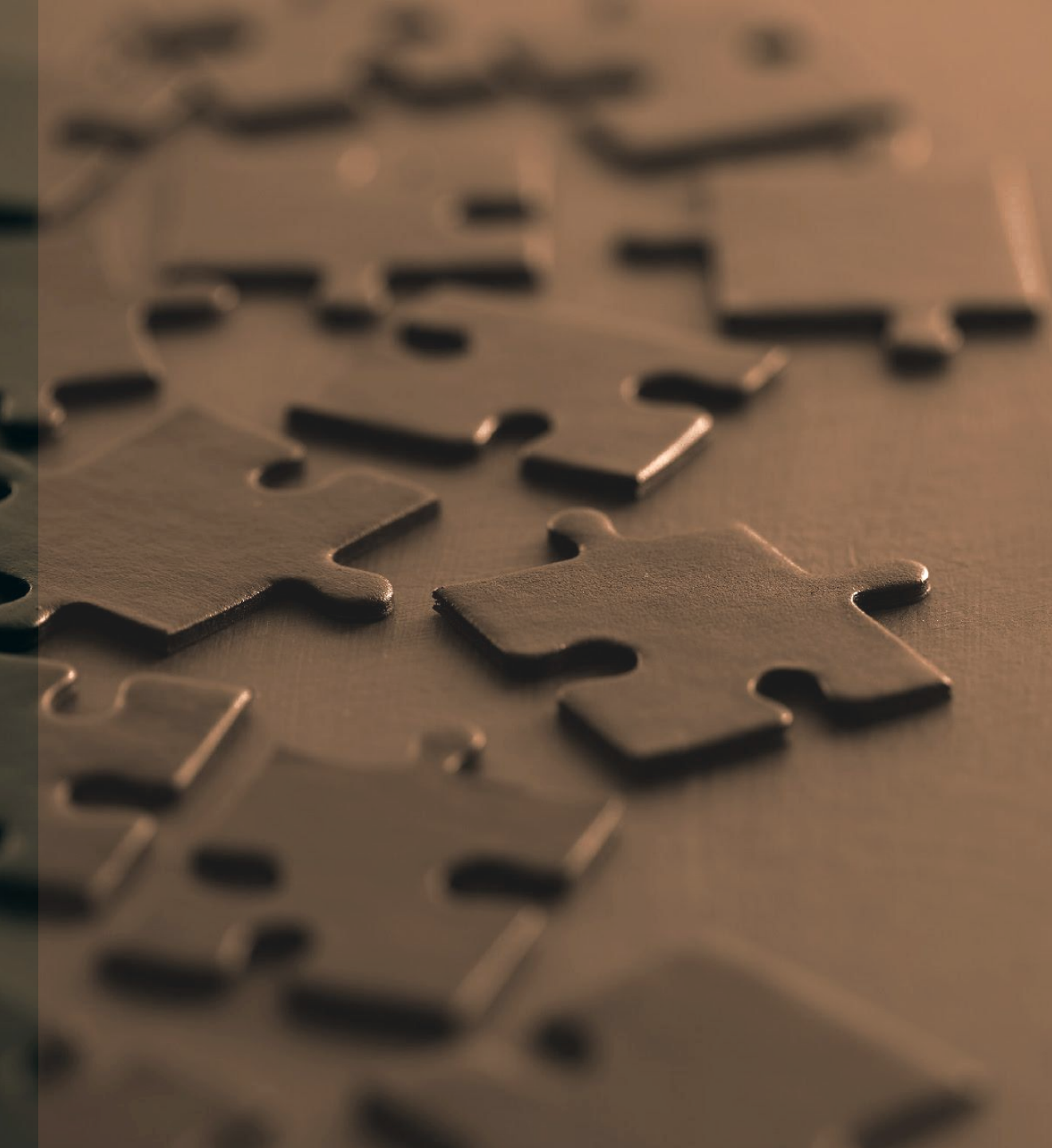
- Enrollment process currently handled manually with Google forms and spreadsheets
- Current enrollment process is labor intensive and difficult to scale

Waitlist Management

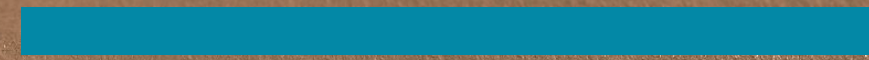
- Inefficient student waitlist management
- Cumbersome to validate & notify course waitlisted students

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

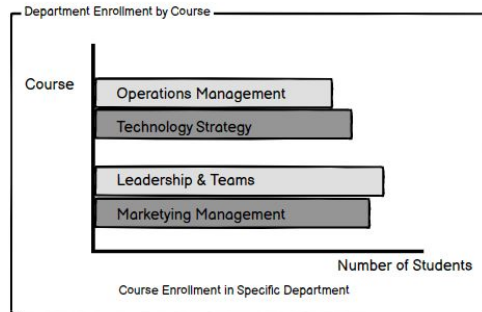
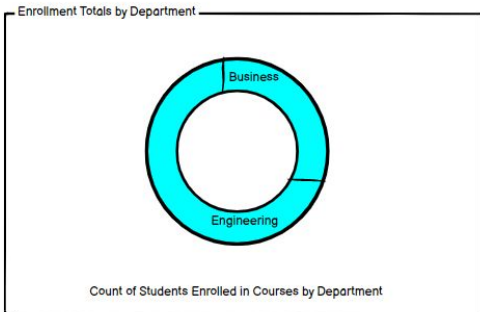
The Salesforce product provides visualizations/metrics on the dashboard, which is refreshed with real-time data from the Course Enrollment user interface(UX/CX) to display the following:

- 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

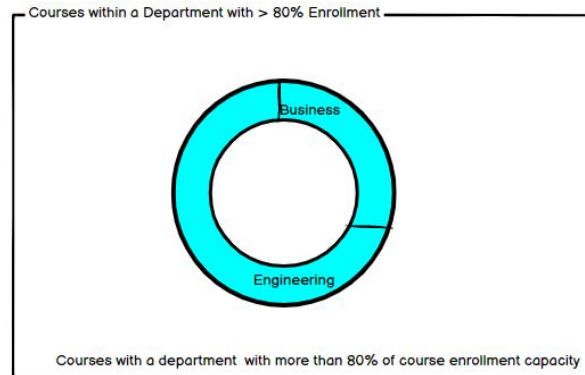


Total Enrollment Status



- [Student Waitlist](#)
- [Administrator Home](#)

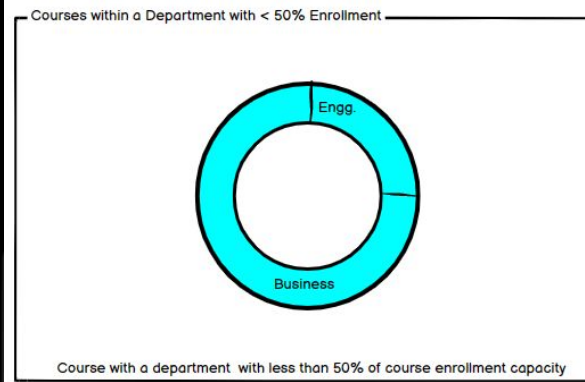
Capacity Status



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 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

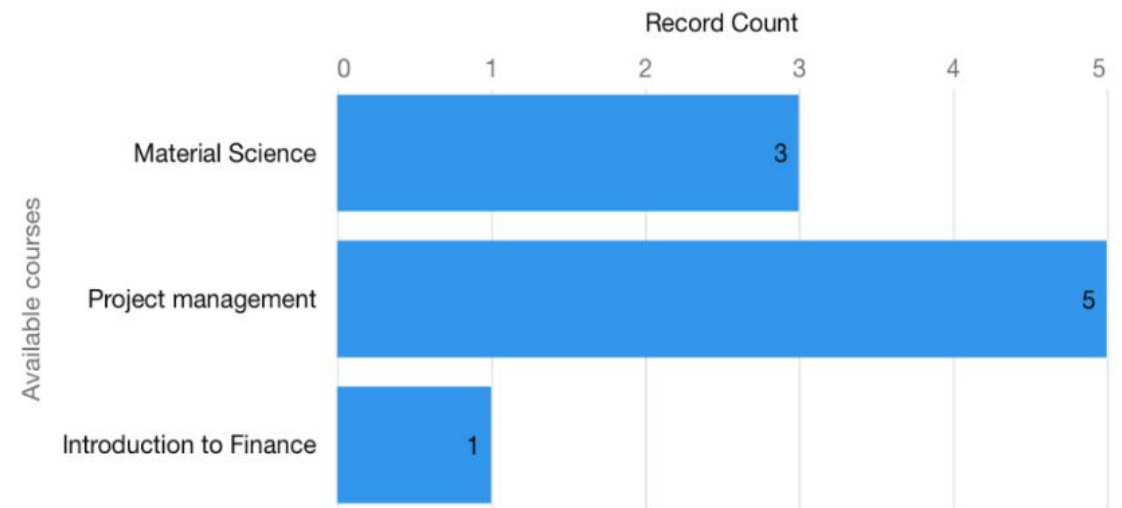
TOTAL ENROLLMENT STATUS

Enrollment Totals By Department



[View Report \(Enrollment Totals By Department\)](#)

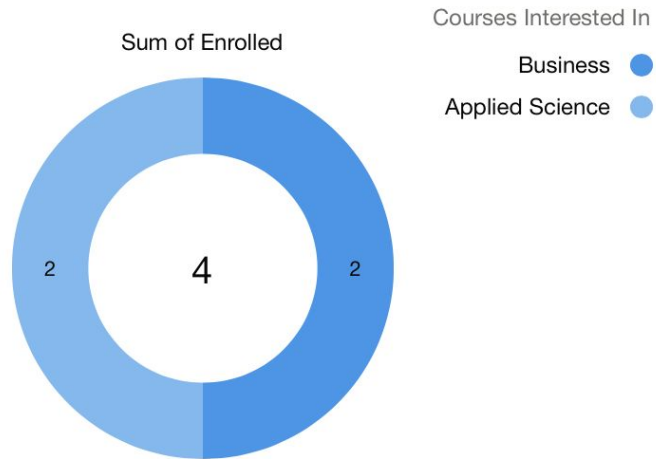
Enrollment By course



[View Report Enrollment By course](#)

CAPACITY STATUS > 80%

Courses within a Dept > 80% Enrollment



[View Report \(Courses within a Dept > 80% Enrollment\)](#)

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 within a Dept < 50% Enrollment



Courses Interested In

Business ●

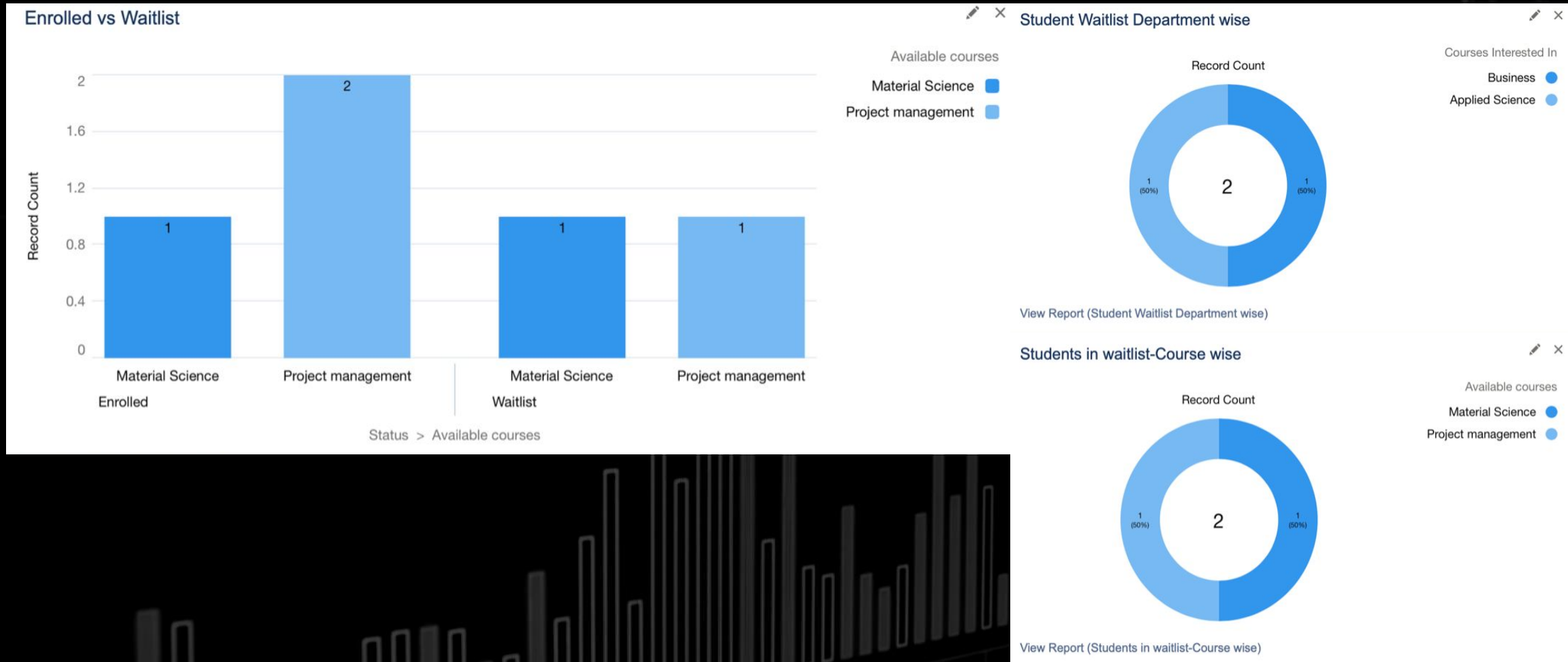
Applied Science ●

[View Report \(Courses within a Dept < 50% Enrollment\)](#)

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:

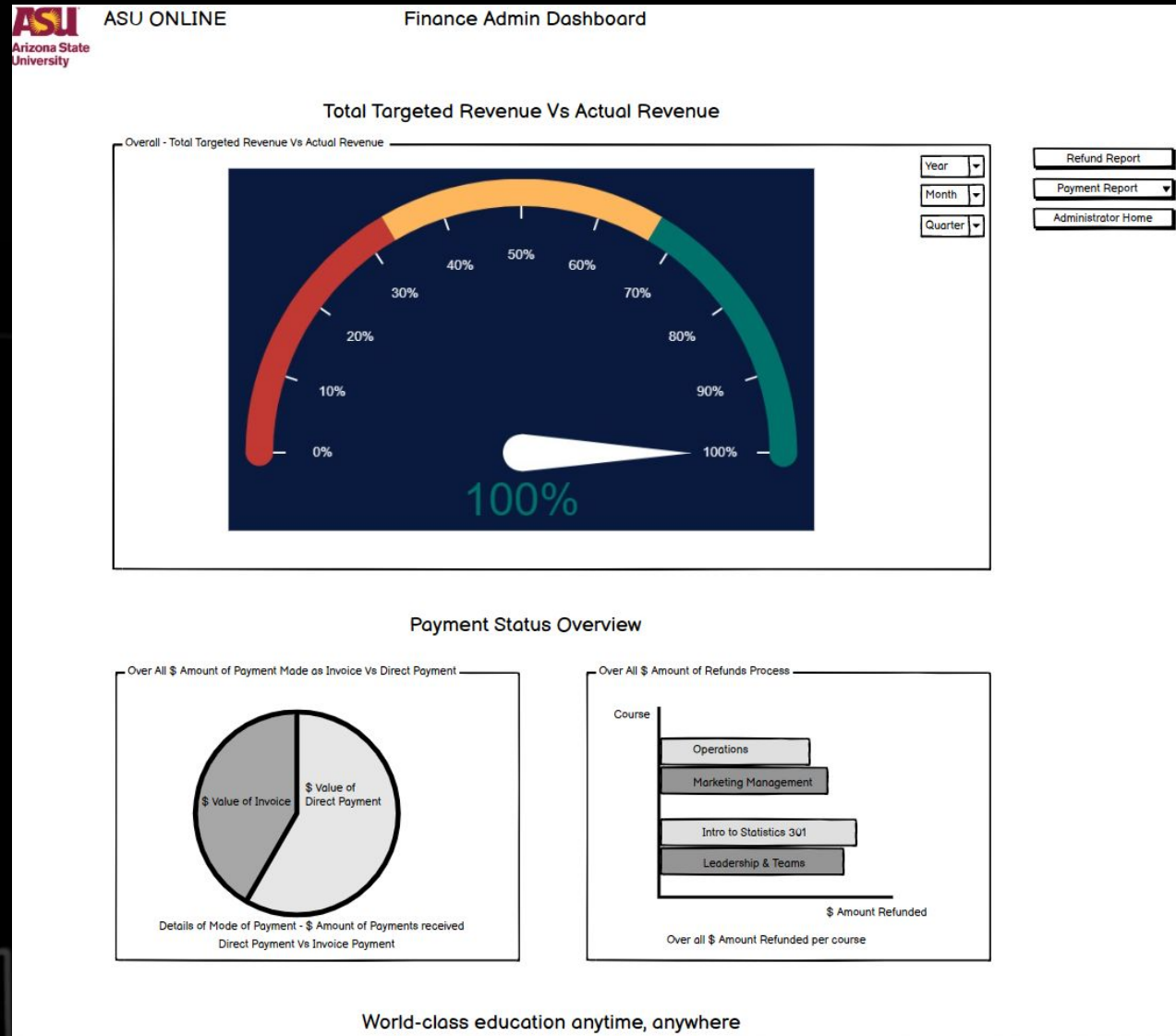
- The total dollar amount of payments completed by the students
- **Payment Received Vs. Invoice generated** (Payments awaited - Accounts Receivable)
- Total dollar amount **refunded to students** as a result of withdrawal from enrollment
- Total number of students who have opted for invoice generation 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.

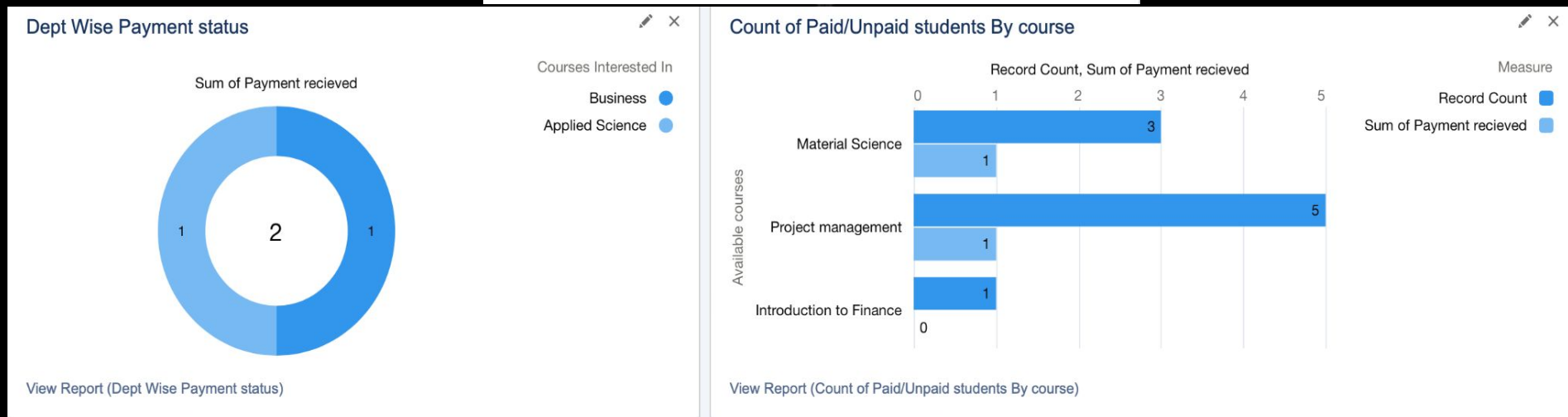
Acceptance Criteria for User Story # 3: Finance User Dashboard (Revised Acceptance Criteria)

- 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

A low-angle, upward-looking photograph of several modern skyscrapers. The buildings are made of dark, textured materials with many windows, creating a strong sense of height and scale. The sky is a pale, uniform color. The overall mood is professional and ambitious.

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





THANK YOU



APPENDIX

USER STORIES

User Story # 1: Curriculum Manager Admin Dashboard

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

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 - Dashboard metric to display courses <50% of capacity
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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:

- The total dollar amount of payments completed by the students
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USER STORIES

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WIREFRAMES



ASU Online courses

Request Information (Step 1 of 2)

Department of Interest

Applied Sciences



Available Courses

Available courses



Course Status

Available



Complete Payment

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WIREFRAMES



ASU Online courses

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 <input type="text"/>	OR Send Payment Invoice
Credit Card # <input type="text"/>	
Security Code <input type="text"/>	
Exp Date <input type="text"/>	
<input type="button" value="Submit Credit Card Payment"/>	<input type="button" value="Submit Payment Invoice"/>

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WIREFRAMES



ASU ONLINE

Thank 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

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ASU ONLINE

ADMINISTRATOR PORTAL USER AUTHENTICATION

Admin User Authentication

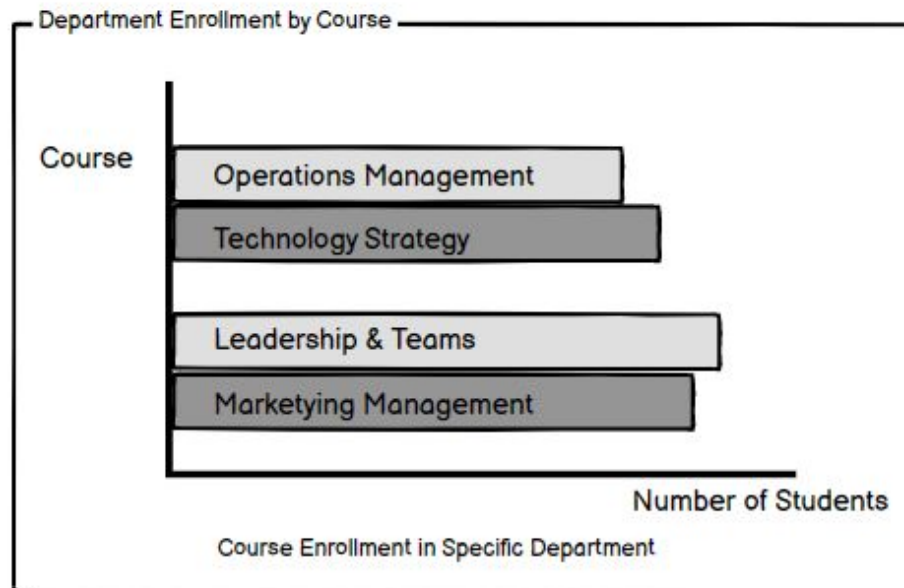
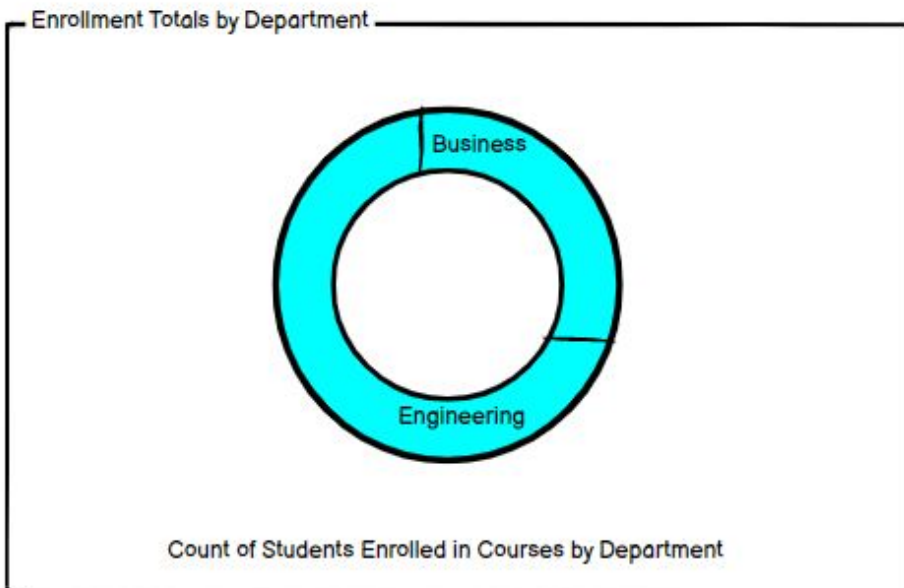
The wireframe shows a login page for an administrator portal. On the left, there is a login form with a 'salesforce' logo, 'Username' and 'Password' input fields, a 'Log In' button, a 'Remember me' checkbox, and a 'Forgot Your Password?' link. The main content area features a promotional message: 'Start your free trial. No credit card required, no software to install.' Below this, a list of benefits is provided: 'With your trial, you get: Preloaded data or upload your own', 'Preconfigured processes, reports, and dashboards', 'Guided experiences for sales reps, leaders, and administrators', and 'Online training and live onboarding webinars'. A 'START MY FREE TRIAL' button is positioned below the list. At the bottom of the main content area, there is a preview of a dashboard with a 'Enroll Alerts' notification and a data table. To the right of the main content area, there are three buttons: 'Curriculum Manager Dashboard - Enrollment Overview', 'Curriculum Admin Dashboard - Student Waitlist', and 'Finance Admin Dashboard'. Below these are two more buttons: 'Finance Payment Report' and 'Finance Refund Report'.

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WIREFRAMES



Total Enrollment Status

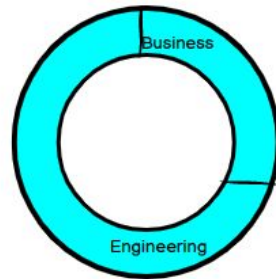


- [Student Waitlist](#)
- [Administrator Home](#)

WIREFRAMES

Capacity Status

Courses within a Department with > 80% Enrollment



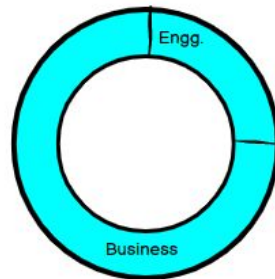
Courses with a department with more than 80% of course enrollment capacity

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

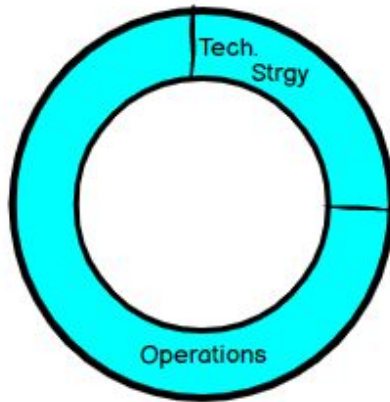
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Engineering	2	17
Data Grid Docs		

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

WIREFRAMES

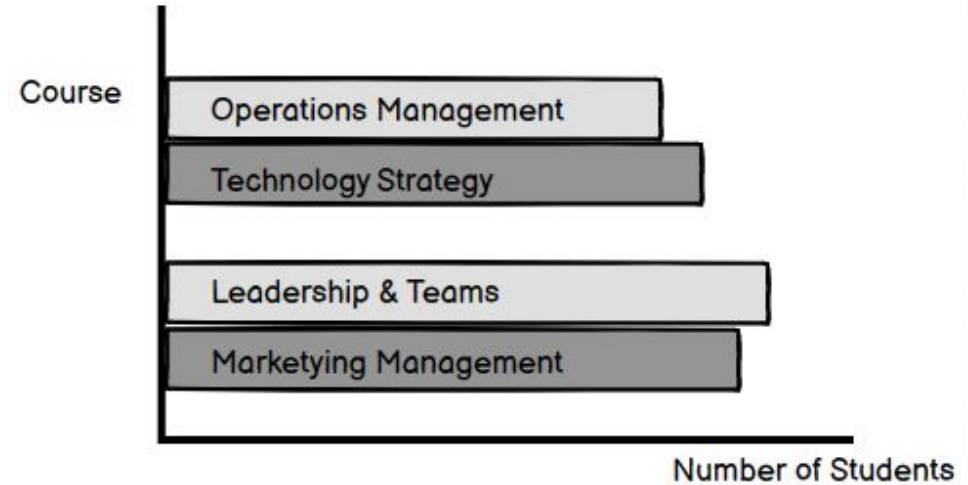
Waitlist Status

Current Course Waitlist by Department



Count of Students on Waitlist by Department

Department Course Waitlist



Course Waitlist in Specific Department

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ASU ONLINE Curriculum Admin Dashboard - Student Waitlist Report

ASU Arizona State University

Waitlisted Students

Enrollment Overview
Administrator Home

Select Department
Applied Sciences

Select A Course
Available courses

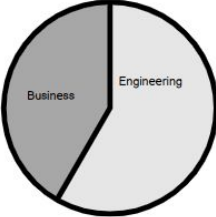
Student Waitlist
Alex Correy
Ben Smith
Luke Whang

Offer Student Course
Julia Burke

Notify To Complete Payment

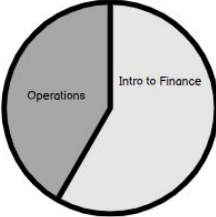
Student Waitlist Overview

Count of Students Waitlisted - Department Wise Report



Report - Department wise count of students on waitlist

Count of Students Waitlisted - Course Wise Report



Report - Course wise count of students on waitlist

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ASU ONLINE

ASU COURSE ADMINISTRATOR PORTAL

Admin User Portal

Curriculum Administrator Portal

Curriculum Admin Dashboard - Enrollment Overview

Curriculum Admin Dashboard - Student Waitlist

Finance Administrator Portal

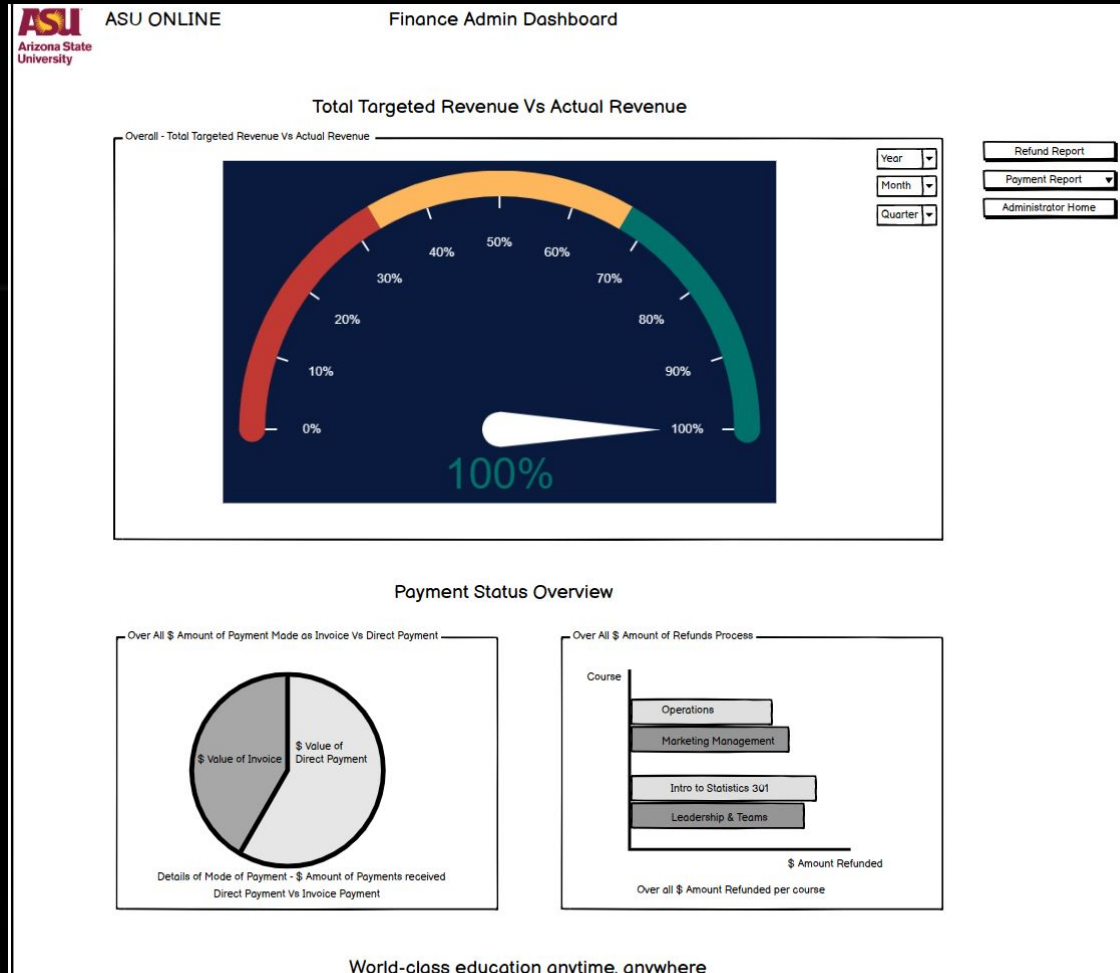
Finance Admin Dashboard

Finance Payment Report

Finance Refund Report

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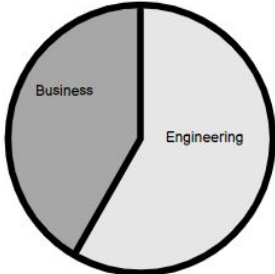


WIREFRAMES

ASU ASU ONLINE Payment Status Dashboard
Arizona State University

Payment Status - Student Count

Department Wise Payment Status Report (Student Count)

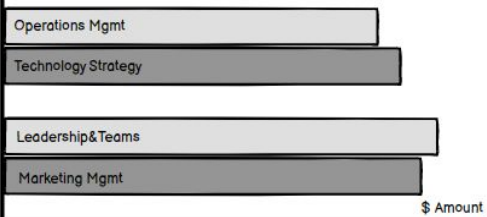


Count of Students for Completed Payment - Count for each Department

Department	Count
Business	30
Engineering	40

Course Wise Detailed Payment Status Report (Student Count)

Course Name



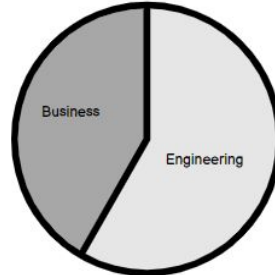
Count of Students for Completed Payment- Count for each course within a Department

Course Name	Count
Operations Mgmt	30
Technology Strategy	40
Leadership & Teams	50
Marketing Mgmt	45

Finance Admin Dashboard
Refund Report
Administrator Home

Payment Status - Total Dollar Amount(\$)

Department Wise Payment Status Report (Dollar Amount)

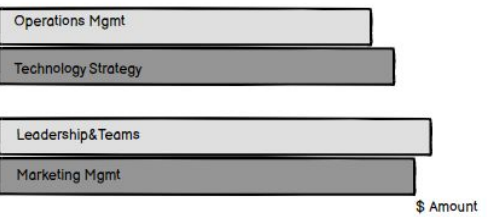


Total \$ Amount Payment for each Department

Department	Total \$ Amount
Business	\$150,000
Engineering	\$200,000

Course Wise Detailed Payment Status Report Details (Dollar Amount \$)

Course Name



Total \$ Amount of Payment for Each Course by Department

Course Name	Total \$ Amount
Operations Mgmt	\$150,000
Technology Strategy	\$200,000
Leadership & Teams	\$250,000
Marketing Mgmt	\$225,000

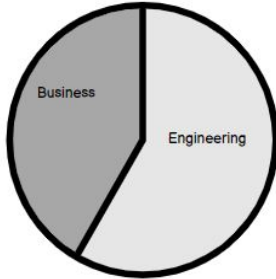
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WIREFRAMES

ASU ASU ONLINE Refund Status Dashboard
Arizona State University

Refund Status - Student Count

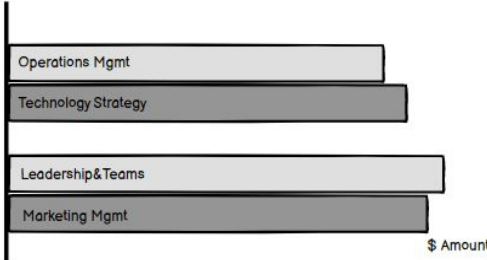
Department Wise Refund Status Report (Student Count)



Department	Count
Business	30
Engineering	40

Count of Students who have requested refund - Count for each Department

Course Wise Detailed Refund Status Report (Student Count)

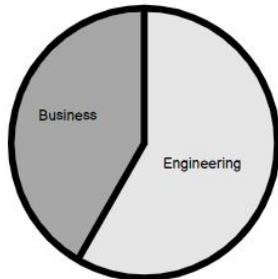


Course Name	Count
Operations Mgmt	30
Technology Strategy	40
Leadership & Teams	50
Marketing Mgmt	45

Count of Students who have requested refund - Count for each course within a Department

Refund Status - Total Dollar Amount(\$)

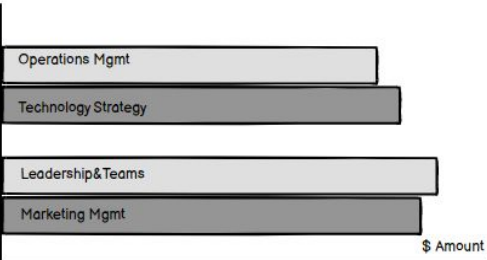
Department Wise Refund Status Report (Dollar Amount)



Department	Total \$ Amount
Business	30000
Engineering	40000

Total \$ Amount Refunded for each Department

Course Wise Detailed Refund Status Report Details (Dollar Amount \$)



Course Name	Total \$ Amount
Operations Mgmt	30000
Technology Strategy	40000
Leadership & Teams	50000
Marketing Mgmt	45000

Total \$ Amount Refunded for Each Course by Department

Navigation: Finance Admin Dashboard, Payment Report, Administrator Home

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