

Project Report Template

INTRODUCTION

1.1 Overview

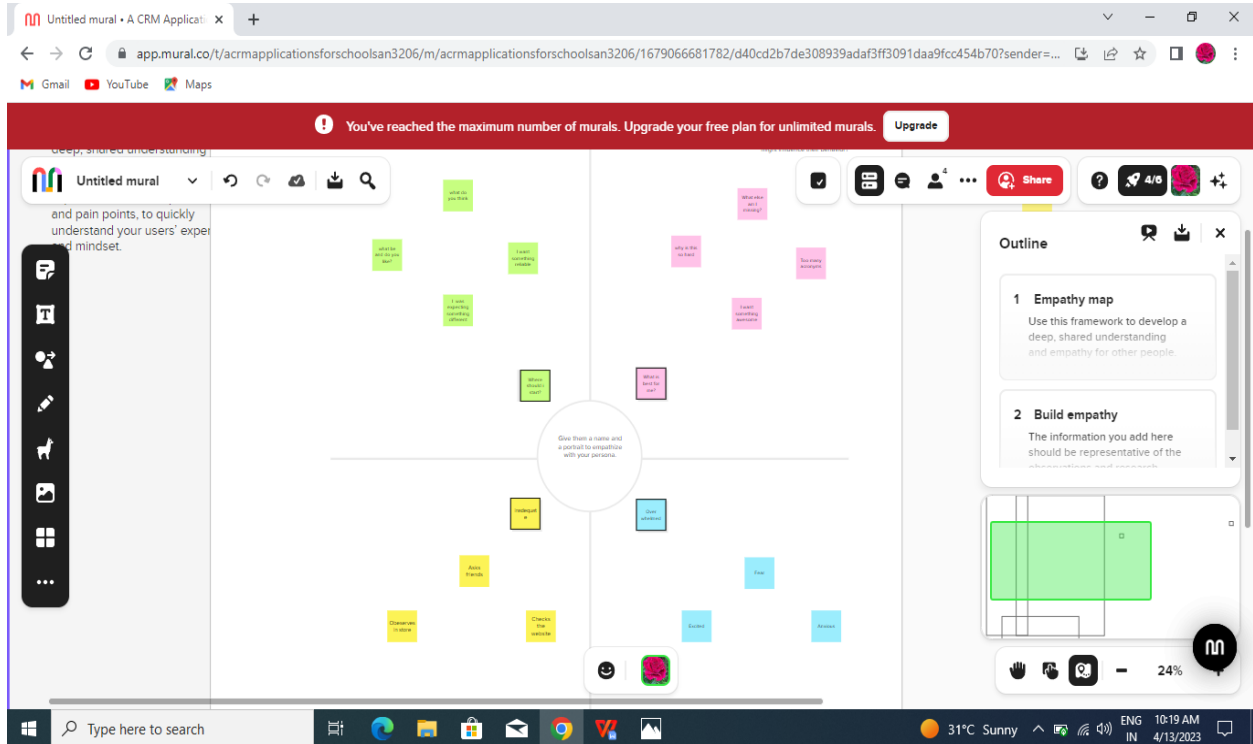
Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth. One important aspect of the CRM approach is the systems of CRM that compile data from a range of different communication channels, including a company's website, telephone, email, live chat, marketing materials and more recently, social media. Through the CRM approach and the systems used to facilitate it, businesses learn more about their target audiences and how to best cater to their needs.

1.2 Purpose: -

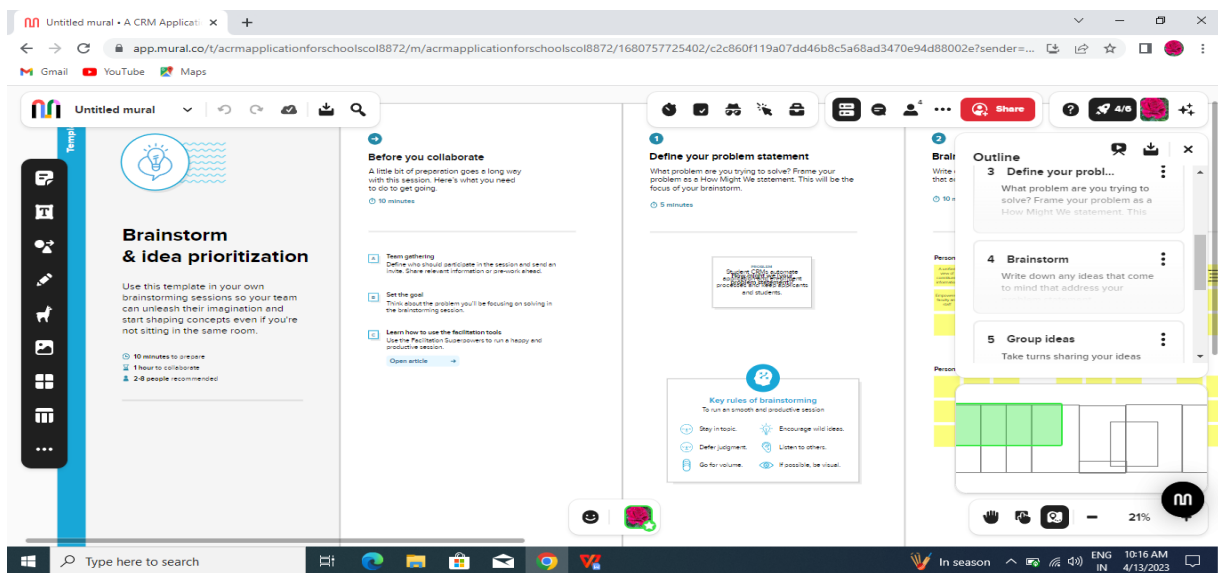
- The focus of CRM is on creating value for the Customer and the company over the longer term
- When customers value the customer service that they receive from suppliers they are less likely to look to alternative suppliers for their needs
- CRM enables organization to gain competitive advantage over competitors that supply similar products or services.

2. Problem Definition and Design Thinking: -

2.1. Empathy Map:



2.2 Ideation and Brainstorming map screenshot:



Untitled mural • A CRM Application

app.mural.co/t/acrmapplicationforschoolscol8872/m/acrmapplicationforschoolscol8872/1680757725402/c2c860f119a07dd46b8c5a68ad3470e94d88002e?sender=...

Gmail YouTube Maps

Untitled mural

em statement

What problem are you trying to solve? Frame your problem statement. This will be the starting point for your brainstorming session.

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

Person 1

Person 2

Person 3

Person 4

Person 5

Person 6

Person 7

Person 8

Group ideas

Take turns sharing your ideas

Outline

3 Define your problem...

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the starting point for your brainstorming session.

4 Brainstorm

Write down any ideas that come to mind that address your problem statement.

5 Group ideas

Take turns sharing your ideas

31°C Sunny

10:17 AM

4/13/2023

Untitled mural • A CRM Application

app.mural.co/t/acrmapplicationforschoolscol8872/m/acrmapplicationforschoolscol8872/1680757725402/c2c860f119a07dd46b8c5a68ad3470e94d88002e?sender=...

Gmail YouTube Maps

Untitled mural

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

Customer Relationship Management

CRM is so much more than technology. Think of it as a business philosophy based on listening to customer needs and behaviors and using that information to build stronger relationships and generate more leads.

Better Relationship

Customer relationship management data can help you gain valuable insight into your typical customer experience for them.

Customer Service Automation

Customer service automation facilitates automation of services such as trouble ticketing, customer case tracking, responding to customer inquiries, scheduling adjustment of resource assignment in real time to meet high priority requests.

Sales Force Automation

Sales Force Automation help Sales professionals boost their potential by automating processes such as contact management, activity management, alerts and notification opportunity management, and task management etc..

Prioritize

Your team should all be on the same page when moving forward. Place your ideas in order of importance and which ideas are important and which ideas are not.

20 minutes

Outline

3 Define your problem...

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the starting point for your brainstorming session.

4 Brainstorm

Write down any ideas that come to mind that address your problem statement.

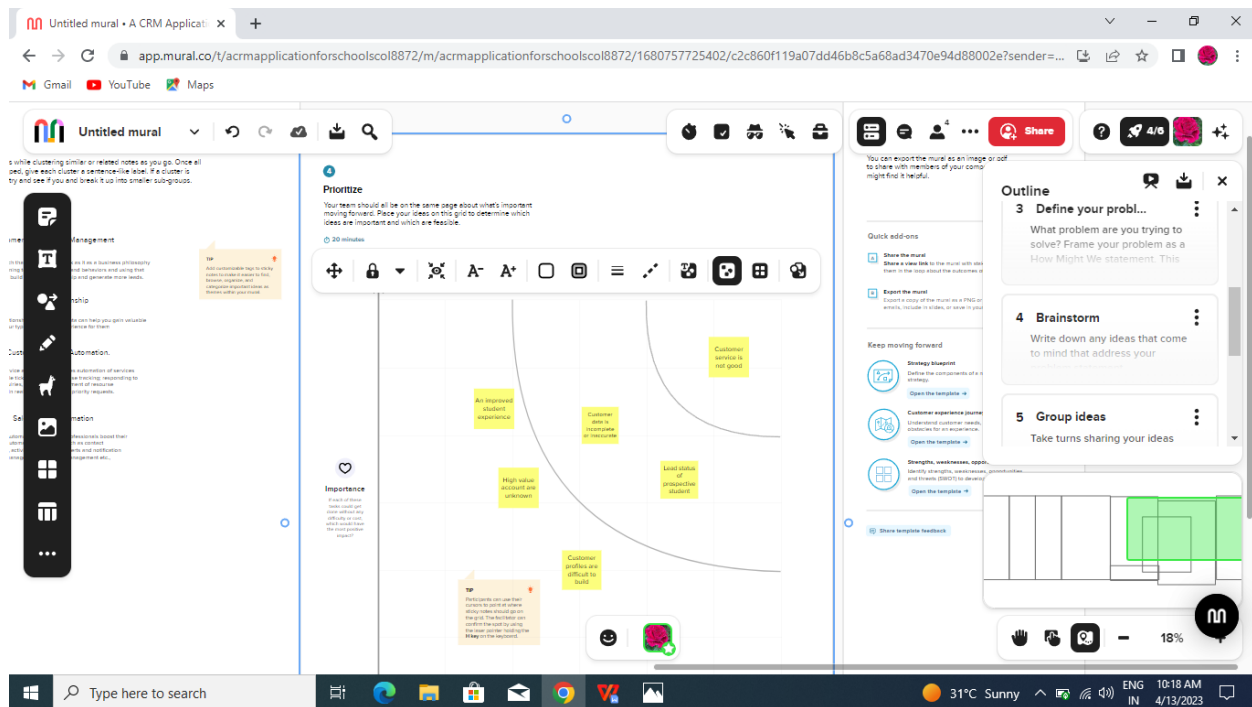
5 Group ideas

Take turns sharing your ideas

31°C Sunny

10:17 AM

4/13/2023



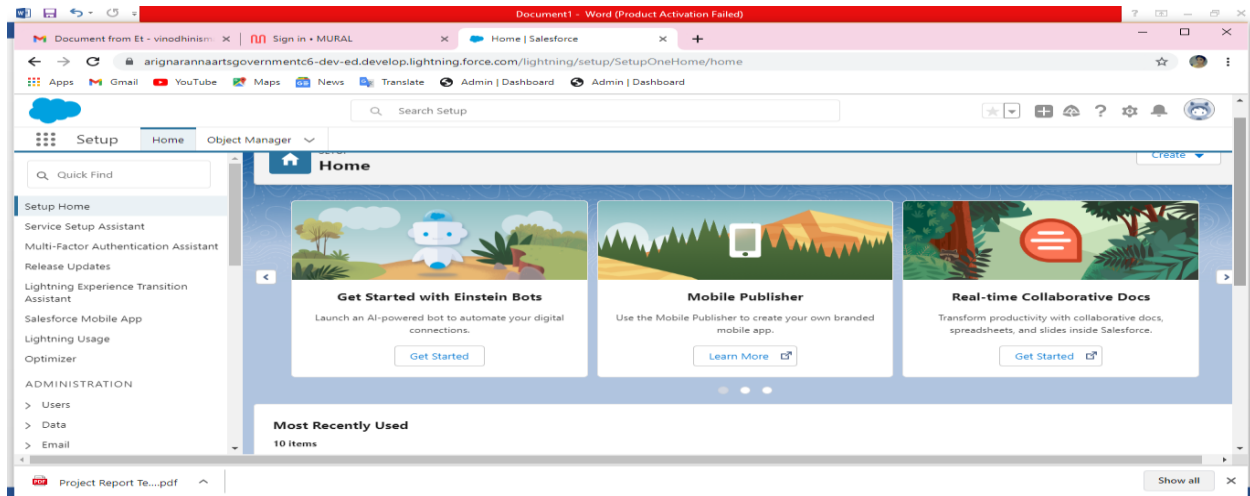
3. RESULT:

3.1 Data Model:

Object Name	Fields in the Object
Object-1	Field Label: phone number Data Type: phone
Object-2	Field Label: schools Data Type: Picklist
Object-3	Field label: Parent address Data Type: Text

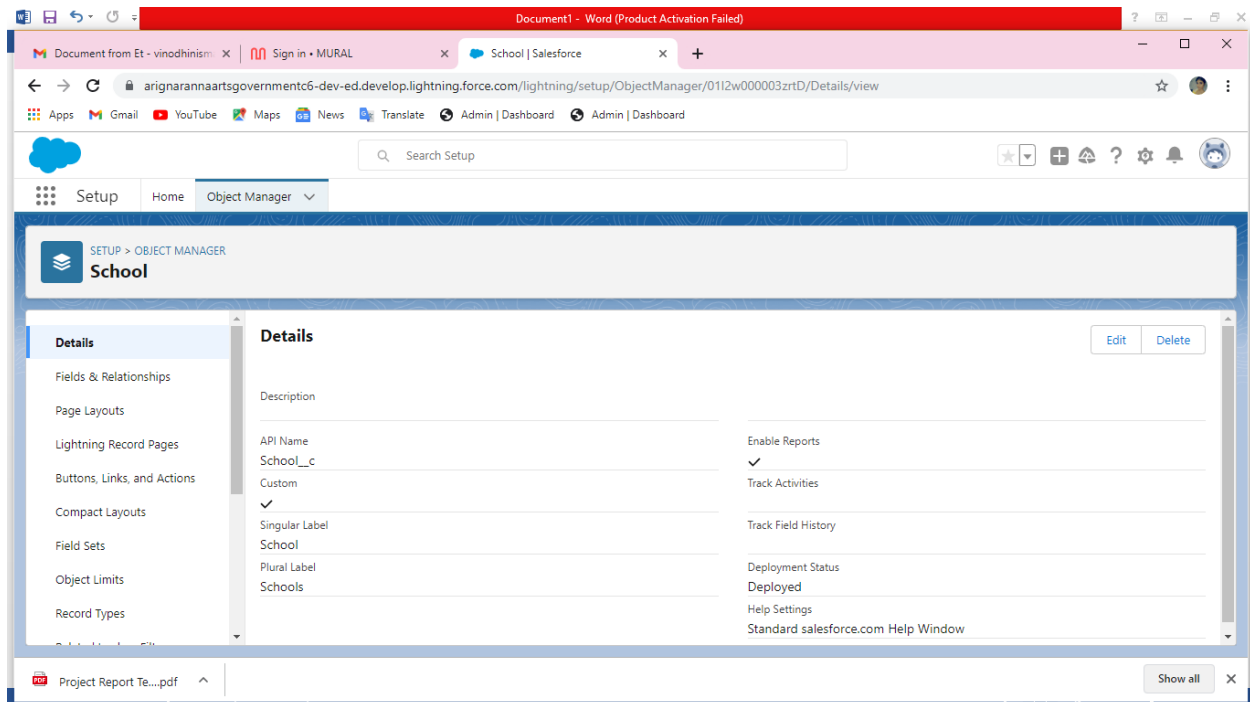
3.2 Activity and Screenshot:

Create Salesforce Org-creating Developer Account

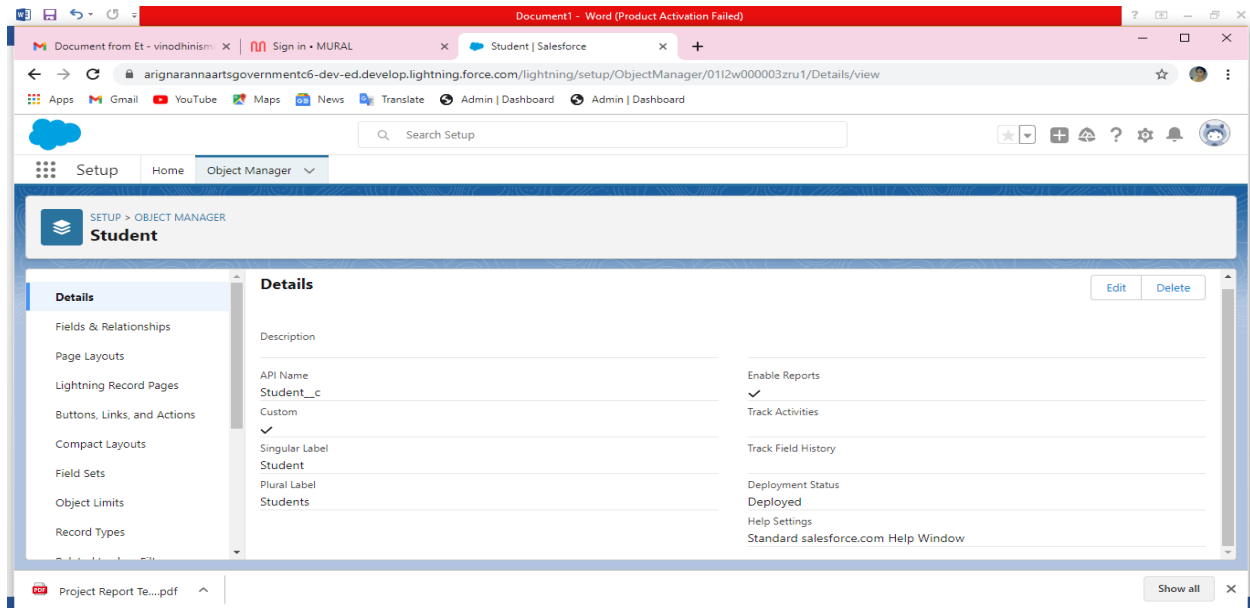


Object:

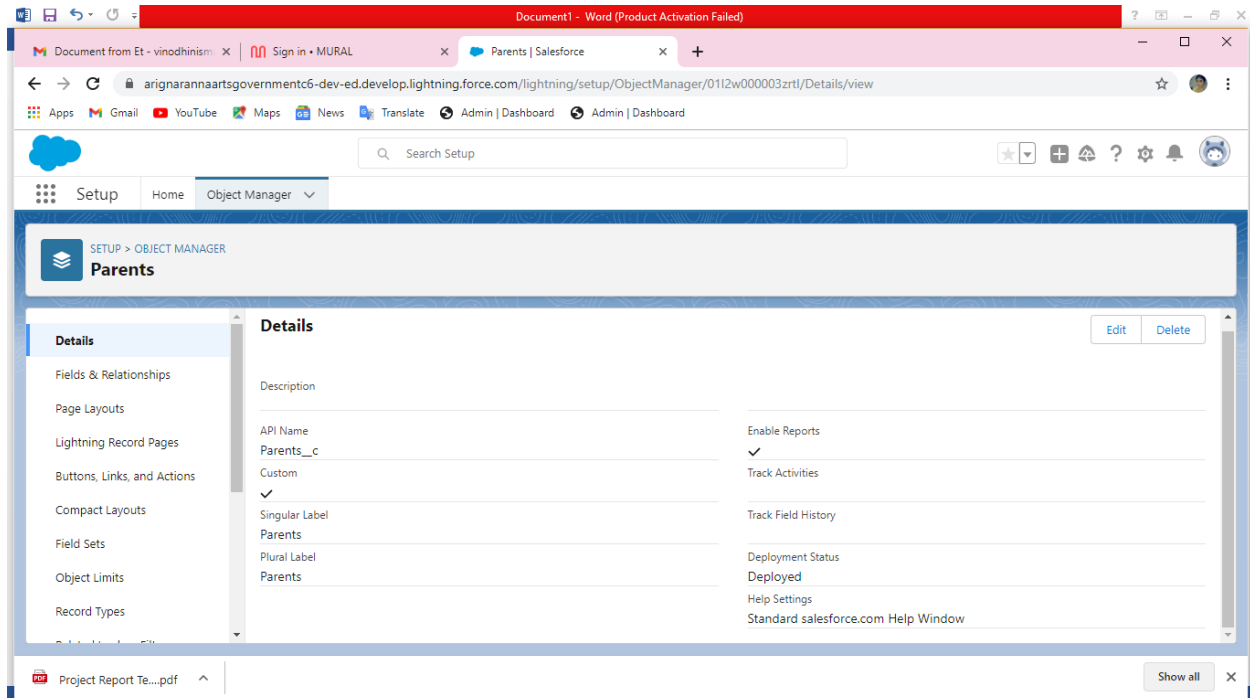
Creation of school Object



Creation of Student Object:

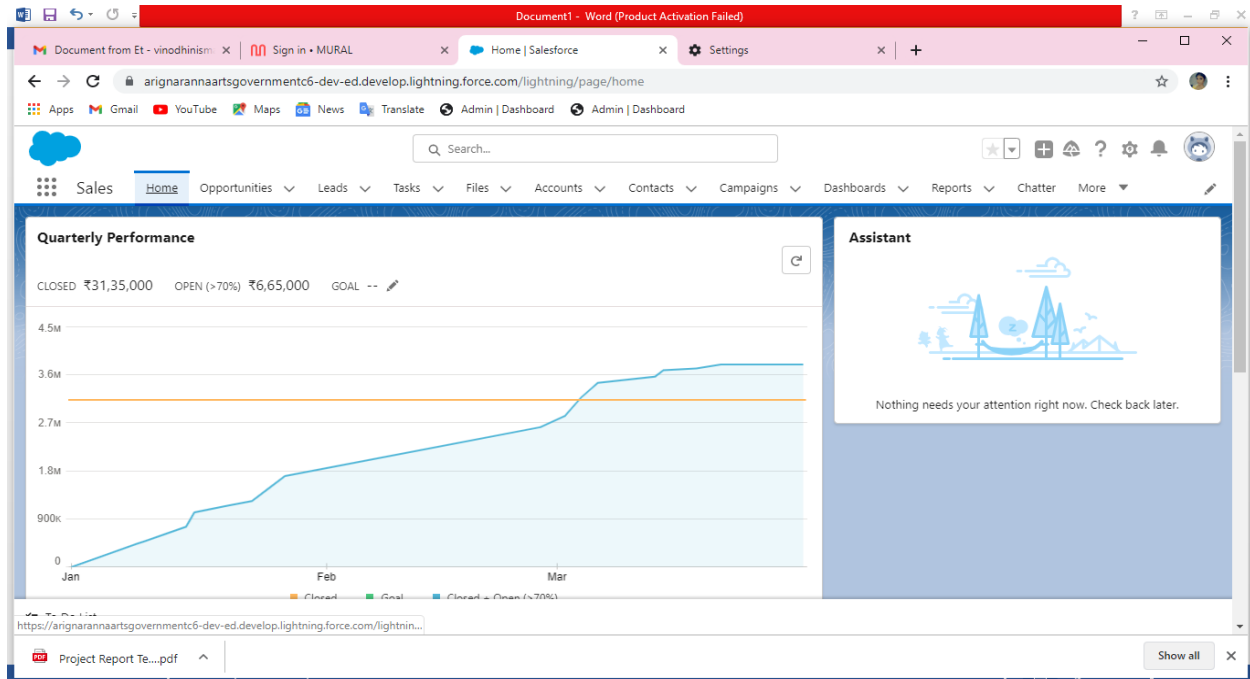


Creation of Parent Object:



Lighting App:

Create the School Management App



Field and Relationship

Creation field for The Schools Objects:

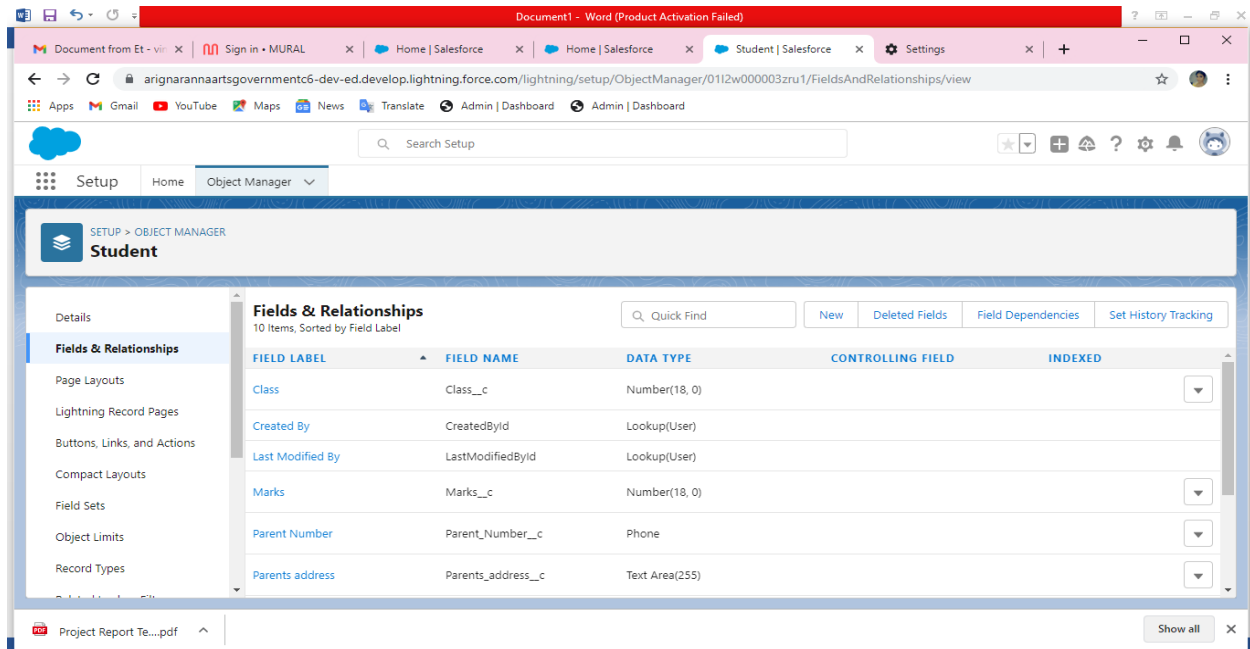
The screenshot displays the Salesforce Setup page for the 'School' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields and their relationships.

Fields & Relationships

13 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
8610160389	X8610160389__c	Phone		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		

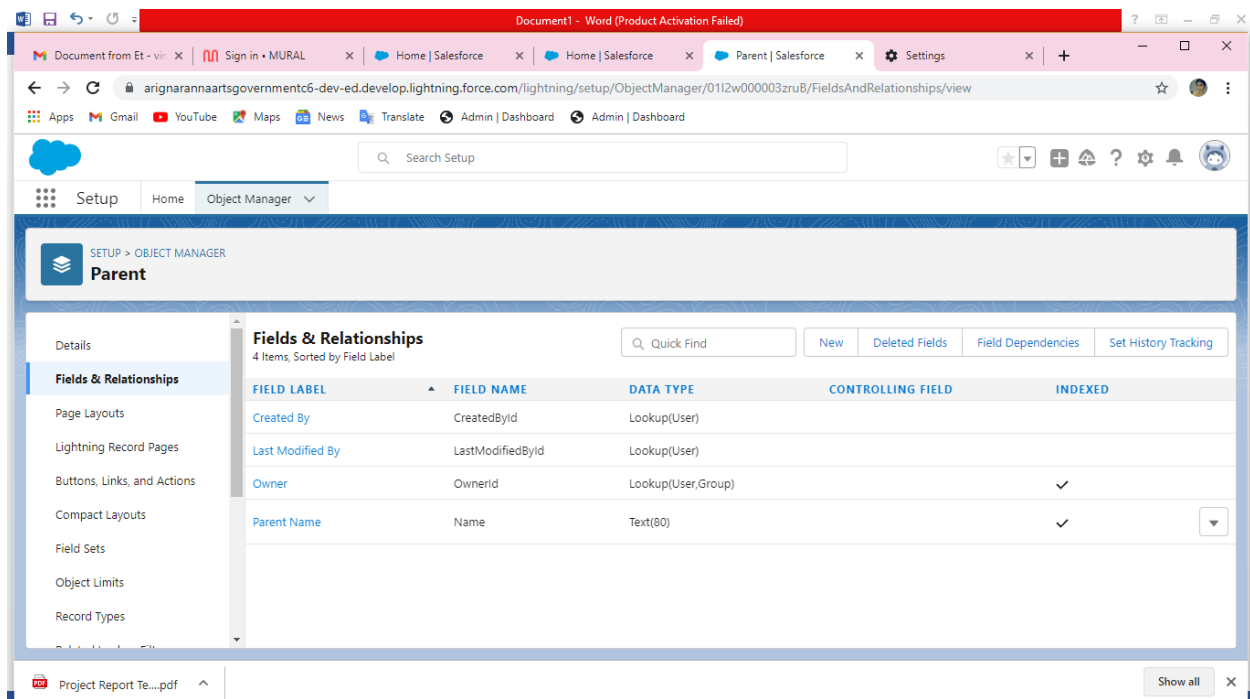
Creation field for The Student Objects:



The screenshot shows the Salesforce Object Manager interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Fields & Relationships' and shows 10 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Parent Number	Parent_Number__c	Phone		
Parents address	Parents_address__c	Text Area(255)		

Creation Field for The Parent Objects:

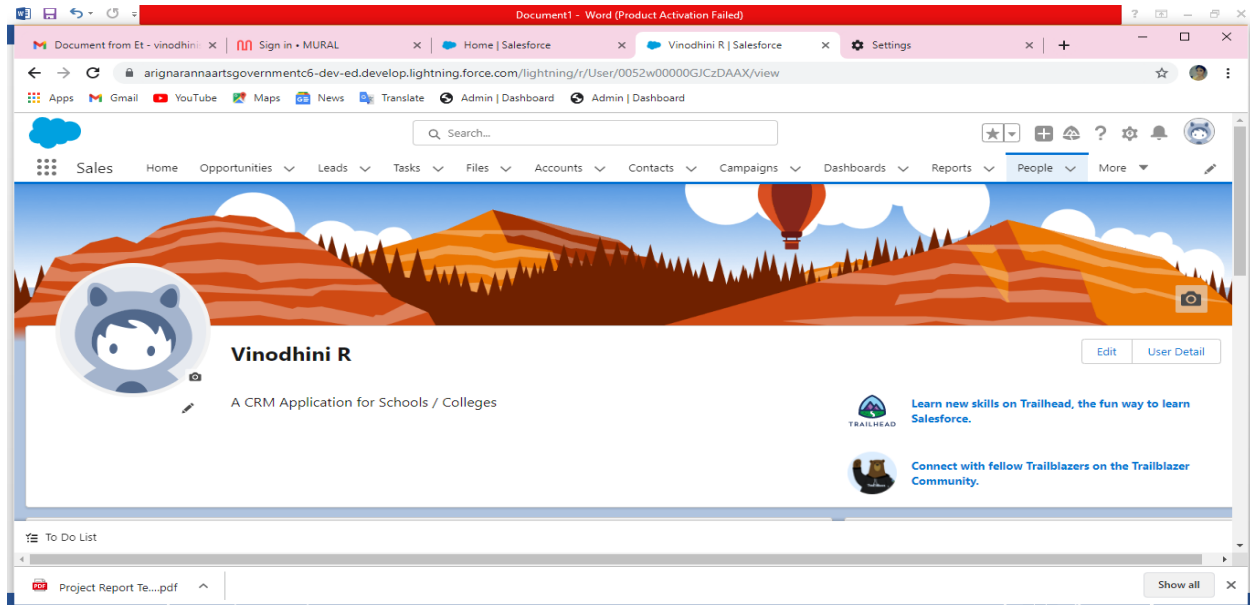


The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table below lists the fields:

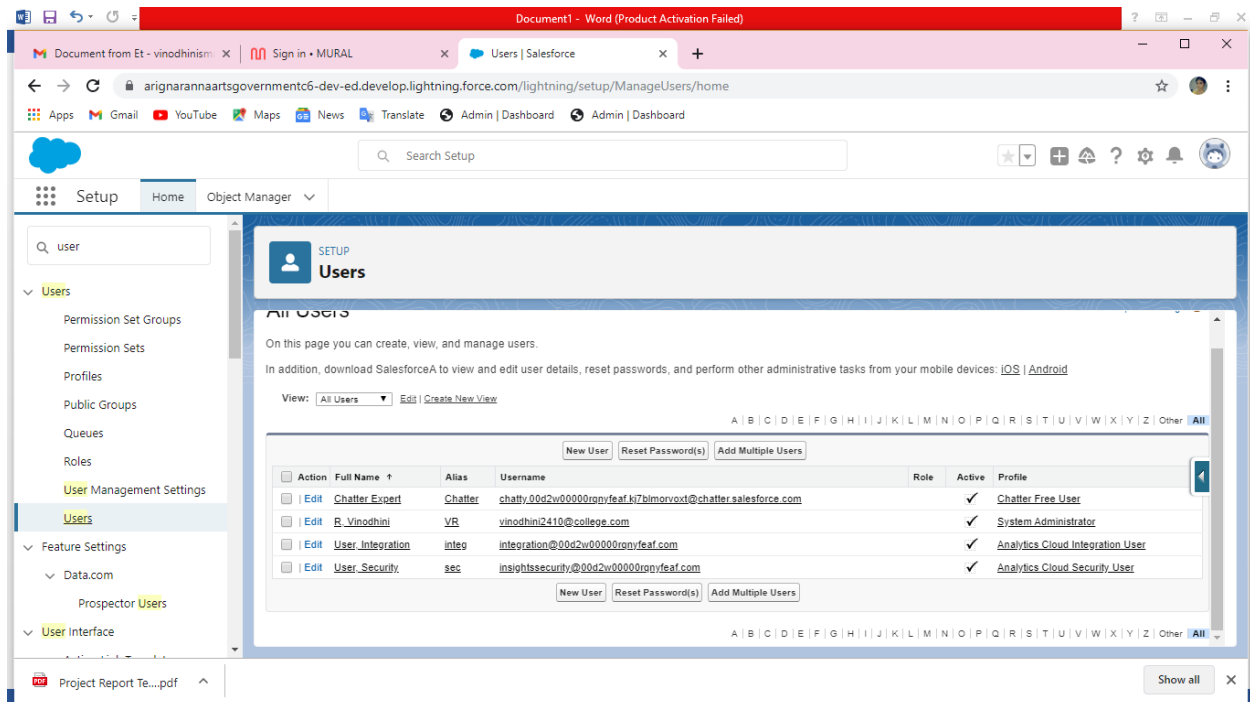
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Name	Name	Text(80)		✓

Profile

Creation On Profile



Users



Permission sets

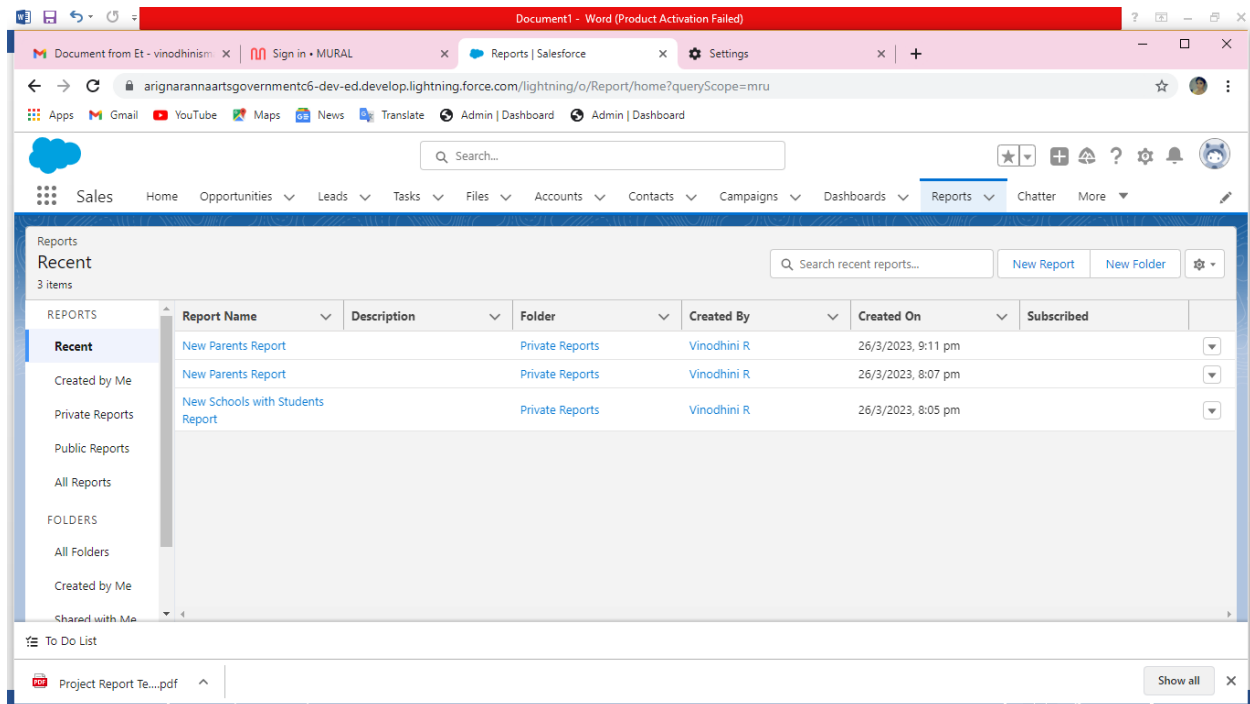
Permission 1

The screenshot shows the Salesforce Setup interface for a Permission Set. The left sidebar contains navigation links for Setup, Home, and Object Manager. Under the 'Users' section, 'Permission Set Groups' and 'Permission Sets' are visible. The main content area displays the 'Teacher Permission set' configuration. The 'Permission Set Overview' section includes fields for Description, License, Session Activation Required, Last Modified By (Vinodhini R), API Name (Teacher_Permission_set), Namespace Prefix, and Created By (Vinodhini R, 13/04/2023, 10:54 am). Below this, the 'Apps' section is partially visible, showing 'Assigned Apps' and 'Assigned Connected Apps'.

Permission 2

The screenshot shows the Salesforce Setup interface for a Permission Set. The left sidebar contains navigation links for Setup, Home, and Object Manager. Under the 'Users' section, 'Permission Set Groups' and 'Permission Sets' are visible. The main content area displays the 'Principle Permission set' configuration. The 'Permission Set Overview' section includes fields for Description, License, Session Activation Required, Last Modified By (Vinodhini R), API Name (Principle_Permission_set), Namespace Prefix, and Created By (Vinodhini R, 13/04/2023, 10:55 am). Below this, the 'Apps' section is partially visible, showing 'Assigned Apps' and 'Assigned Connected Apps'.

Reports



4. Trailhead profile public URL

Team Lead- <https://trailblazer.me/id/vmathsemii>

Team member-1 <https://trailblazer.me/id/yuvav8>

Team member-2 <https://trailblazer.me/id/tgnanasekaran>

Team member-3 <https://trailblazer.me/id/sudha1953>

5. ADVANTAGES:

- **Better Knowledge of Customers:**

Customer Relationship Management is a customer-centric technique. The main focus of CRM technique is on the customers of Business. It helps businesses to acquire all required information of customers. This information is then stored and used for understanding customer behavior.

- **Retain More Customers:**

It not only focuses on understanding and serving the existing customers of businesses. CRM aims at acquiring more and more customers for businesses. It targets to increase the customer base & retain them for the long term. Through CRM, a communication channel is developed between customers and business which acquires all information regarding customers.

- **Better Segmentation:**

CRM enables businesses in the proper segmentation of market audiences in a systematic way. It collects and supplies all required information regarding potential customers which helps in classifying them according to their interests and criteria. CRM helps in creating groups of audience according to categories and thereby planning specific customer marketing campaigns.

- **Minimizes Cost:**

Cost-effective is one of the major advantages of CRM to business. It helps in reducing cost associated with several processes in many ways. Firstly it reduces all the paperwork involved in different processes. All data is stored digitally on the database. Also, it reduces the manual work to be done in businesses. This leads to a decrease in staff requirements for manual work.

- **Enhance Corporate Image:**

A good image in market is a dream for every business. Business having a good reputation enjoys several benefits in market. Customers get easily attracted to these brands. A good image of company also helps it in acquiring funds from the market. The image of a business is created by its customers. Customers when treated well & satisfied properly, they will definitely spread the good word about the business.

- **Increase Business Growth:**

CRM has an effective role in increasing the profits & turnover of business. Through it, businesses increase their return on investment. CRM helps in creating more and more loyal customers for the long term. These all loyal customers do repeat purchases and increase the revenue of the business. Large revenues collected helps businesses in increasing their size.

- **Controls Customer Defection Rate:**

Retaining customers is one of the major challenges for every business. In today's competition customers are more frequently shifting from one product to another. CRM helps businesses in retaining and maintaining long term relationships with its customers. CRM provides all information about the market to business. A complete idea about customers' needs and expectations is acquired which helps in serving them in a better way.

DISADVANTAGES:

- **Costly:**

Implementation of CRM system requires huge cost to be spent by the business. CRM software are too costly as it came with different price packages as per the needs of organizations. It increases the overall expenses of business and may not be suitable for small businesses.

- **Training:**

For proper functioning of CRM, trained and qualified staff is required. It takes a huge cost and time for providing training to employees regarding CRM systems. They need to learn and acquire information regarding CRM software for a proper understanding of it. All this takes large efforts both in terms of money and time on the part of the organization.

- **Security Issues:**

Another major drawback with CRM is the insecurity of data collected and stored. All of the data collected is stored at one centralized location which has a threat of being lost or hacked by someone. Employees may add inaccurate data or manipulate figures leading to wrongful planning.

- **Eliminates Human Element:**

CRM has eliminated the involvement of humans as it works on a fully automated system. Whole Data is collected and processed automatically through CRM software. A company relationship with its customers can be properly managed through direct interaction between peoples and its staff. Loss of human touch may cause customers to shift anywhere else thereby reducing sales and revenue.

APPLICATION:

1. Automated Marketing:

The software can automate marketing tasks such as email campaigns, SMS messaging, and social media outreach, allowing schools to reach more prospective students.

2. Lead Management:

A CRM can help schools track and manage leads, providing a centralised database of prospective students. This allows schools to prioritize leads and follow up with them in a timely manner.

3. Personalized Communication: By tracking student interactions and preferences, schools can send personalized communications that are more likely to resonate with prospective students.

4. Data Insights: The software provides valuable insights into student behaviour and preferences, allowing schools to make informed decisions about their recruitment efforts.

5. Improved Outreach Efforts: With all data in one place, schools can analyse trends and make data-driven decisions about their outreach efforts. This can help schools reach the right students with the right message, increasing the chances of attracting new students.

CONCLUSION:

Overall, School CRM software can help schools streamline the enrollment process, reach more prospective students, and increase admissions. It helps schools and preschools in managing student data and interactions, automate tasks related to recruitment and enrollment, and improve the efficiency of their recruitment and retention efforts. It can also help to increase the effectiveness of enrolment campaigns. SCHOOL MANEGEMENT CRM APPLICATION enables you to do all this and much more on a unified platform. Schedule a demo today and learn more about a purpose-built growth solution for schools.

FUTURE SCOPE:

Customer Relationship Management is the best means to reach your customers and serve them in the best way. It automates all those tasks which enterprises used to perform manually. Every organization is set up with some frustrated ambitions and targets. The better the performance of your business, the better the relationship with your customers will be. CRM software Development can turn your business into a powerhouse of sales. Thus, CRM software is no longer essential, in fact mandatory for small and medium businesses. Now, you can easily access the CRM software virtually from anywhere and anytime. All you need an internet connection to further the scope of doing your business. So, don't be late and perform the necessities for implementing the CRM software in your business.