BHARATHI WOMEN'S COLLEGE (AUTONOMOUS),
CHENNAI - 600108

A PROJECT
ON
A CRM APPLICATION FOR
SCHOOLS / COLLEGES

BY

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1. INTRODUCTION

1.1 OVERVIEW

A CRM is a system that helps schools manage the entire lifecycle of potentials. Application for the students who are starting their journey of studies. CRM systems are software applications which means automate and manage communication with current students. Personal details of students are maintained easily through this application. The CRM (Customer Relationship Management) application is one of the trustable platforms for schools/colleges.

1.2 PURPOSE

- Reduction in expenses.
- Improvement of the organization Management process.
- Increases the loyalty of students.
- Increases the number of prospective students.
- It gives a glimpse of the history of students.
- It reduces errors.
- Able to create documents related to school management.
- Able to attain thorough knowledge of CRM Applications.
- Able to create a schedule or reports related to student details.

2 . PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP

2.2 IDEATION AND BRAINSTORMING MAP

② Brainstorm

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

🕐 10 minutes

TIP
You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

Person 1
- REDUCES THE VALUABLE TIME
- MINIMIZE THE COST
- EXPAND THE KNOWLEDE
- EASY TO APPLY
- MORE DETAILS TO KNOW ABOUT COLLEGES

Person 2
- STRESS FREE APPLY METHOD
- PLATFORM FOR DEVELOPING SKILLS
- MAKE PEOPLE RELAX
- GOOD REPUTATION OF SCHOOL /COLLEGE

Person 3
- MOSTLY USEFUL IN PANDEMIC SITUATION
- KNOW THE POSITIVES AND NEGATIVIES
- MORE JOY WITH APPLICATION
- TO CHOOSE FAVOURITE COURSE

Person 4
- ENVELOPING THEIR IDEAS
- REVIEW THE COMMENTS ABOUT SCHOOL/ COLLEGES
- ABLE TPO CHOOSE COMFORTABLE APPLICATION COST
- CHOOSE FAVOURITE SCHOOL / COLLEGES

Person 5

Person 6

Person 7

Person 8

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 and break it up into smaller sub-groups.

🕐 20 minutes

1)MAKE HAPPY WITH ONLINE APPLICATION PROCESS
2)STRESS FREE
3)REDUCES THE TIME
4)MINIMIZE THE COST
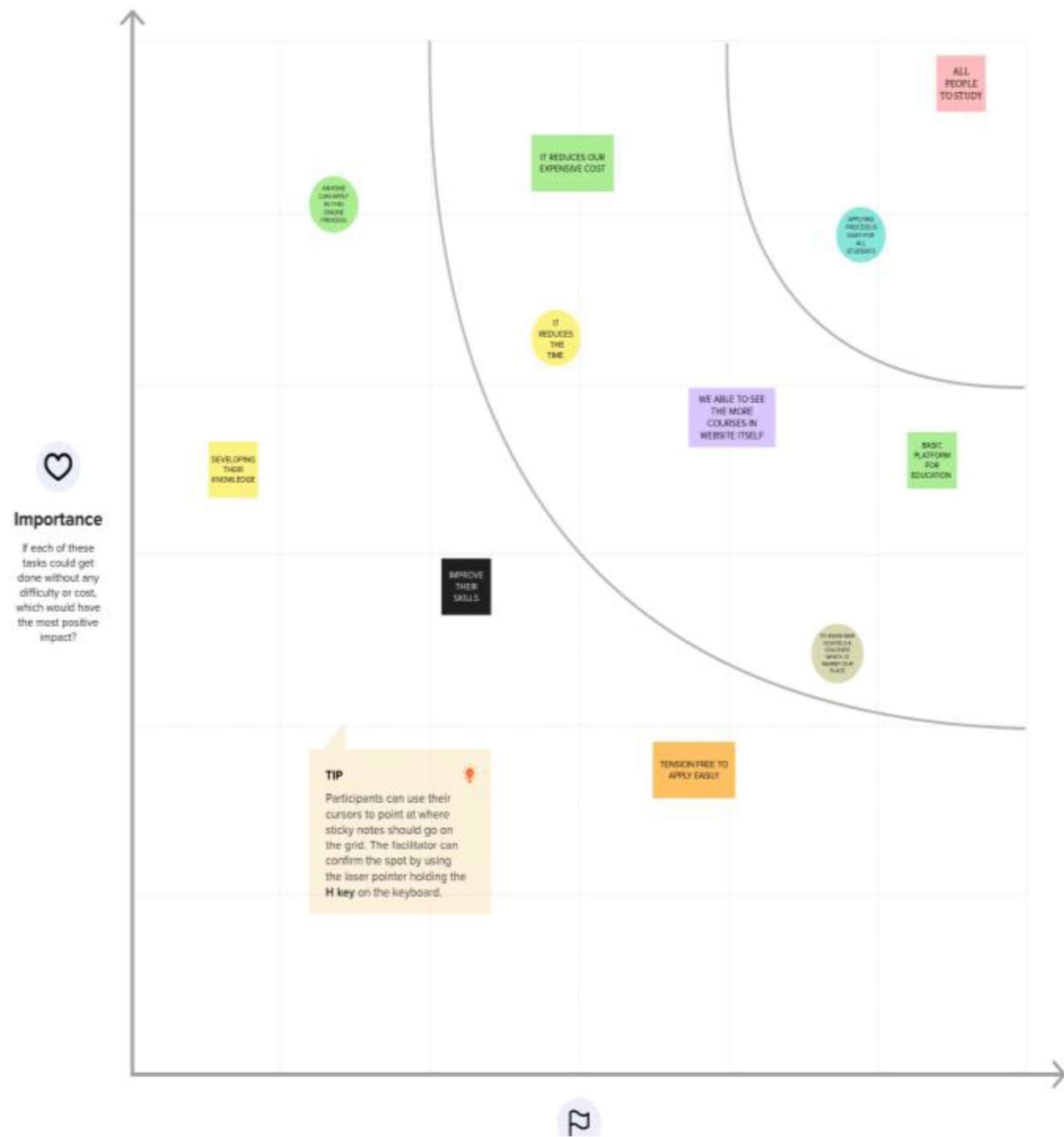5)HAPPY WITH THE APPLICATION RESULT
6)PROCESSING WORK IS FINISHED EASILY
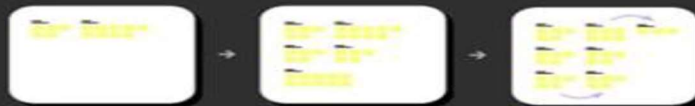
④

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⏱ 20 minutes

♡

Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

ALL PEOPLE TO STUDY

IT REDUCES OUR EXPENSIVE COST

ANYONE CAN APPLY IN THIS ONLINE PROCESS

APPLYING PROCESS IS EASY FOR ALL STUDENTS

IT REDUCES THE TIME

WE ABLE TO SEE THE MORE COURSES IN WEBSITE ITSELF

BASIC PLATFORM FOR EDUCATION

DEVELOPING THEIR KNOWLEDGE

IMPROVE THEIR SKILLS

TIP

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the **H key** on the keyboard.

TENSION FREE TO APPLY EASILY

3. RESULT

3.1 DATA MODEL

Object Name	Fields in the Object		
Object 1	**Field label**	**Data type**	
	Students	Phone	
	Parents	Area: Text	
Object 2	**Field label**	**Data type**	
	Schools	Roll up summary	
	Principal	Text	

3.2 ACTIVITY & SCREENSHOT

Milestone 1: Salesforce

Creation of salesforce Developer org.
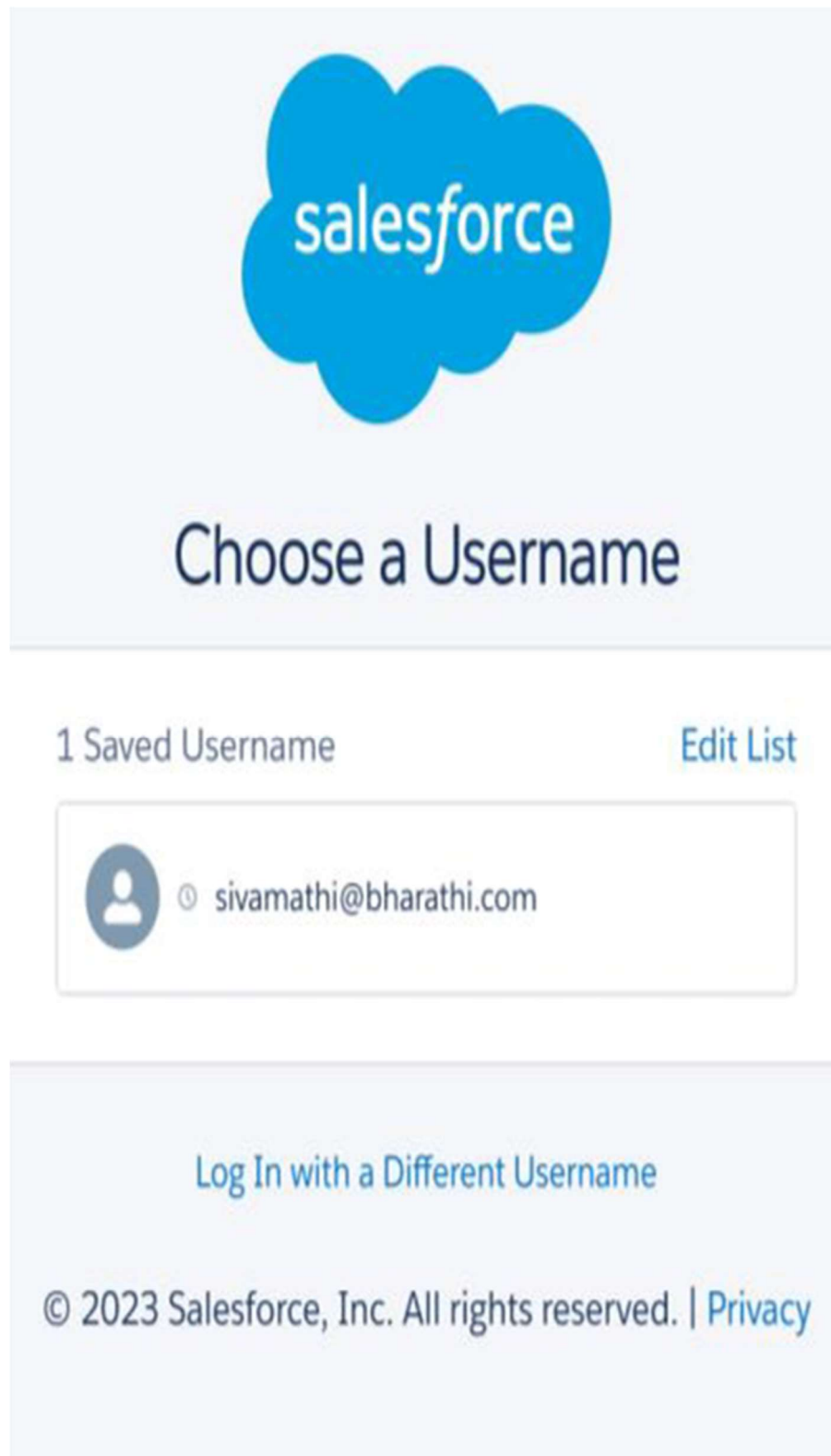
Milestone 2: Object

(i) *Creation of school object*

       In this object, we create the school identity for management.
       ex: Label: School
             Plural: Schools

(ii) *Creation of student object*
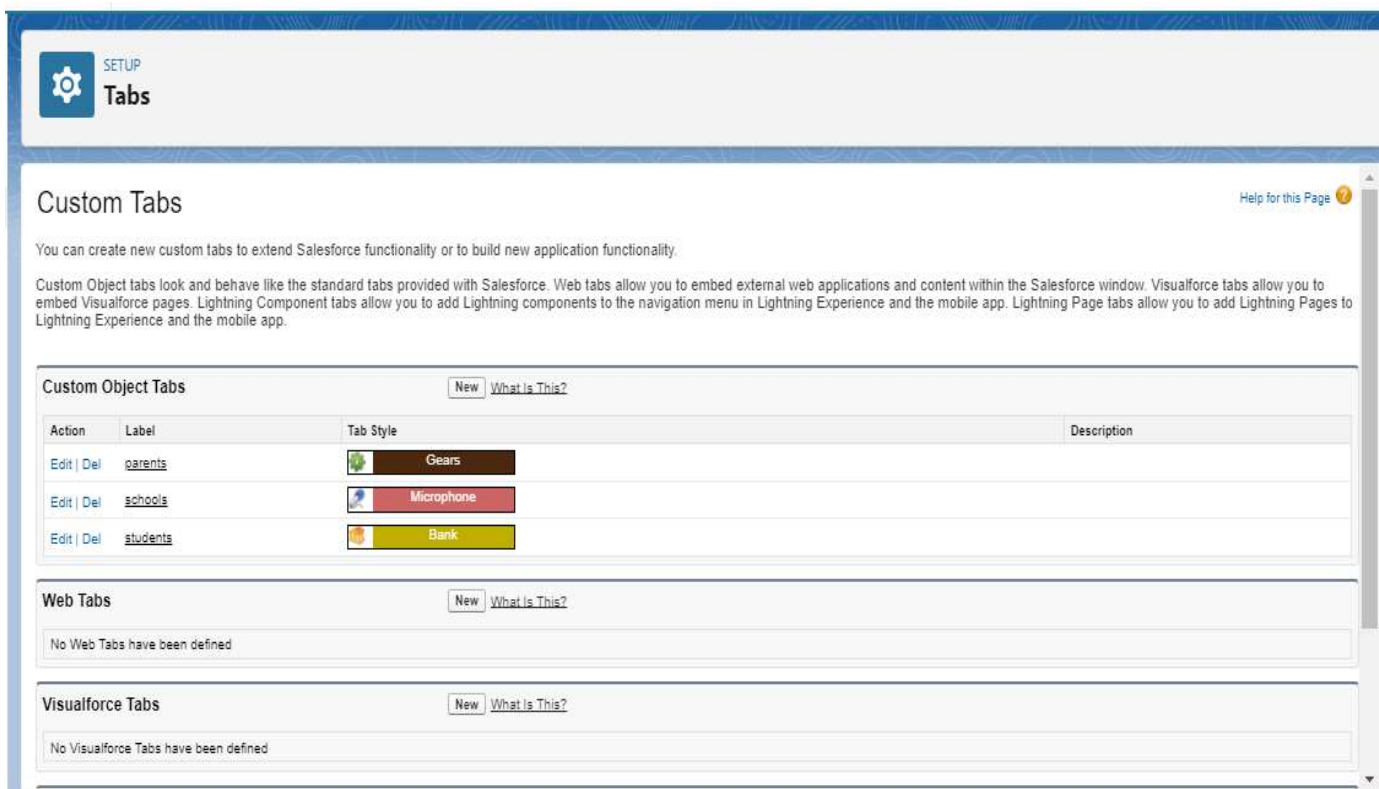
       In the same way, create the student identity for schools.
       ex : Label: Student
             Plural: Students

(iii) *Creation of parent object*

       In the same way, create the identity of parents belonging to their children.

Milestone 3: Lightning app

In this Lightning app, we create the school management as the record name.
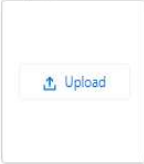
Milestone 4: Fields and Relationship

Relationships are created by creating custom relationship fields on an object.

Milestone 5: Profile

This is created for object permission fields and user permission.

Milestone 6: Permission Sets

This is created to give permission for Principal and Teacher users.

Milestone 7: Users

A user is anyone who logs in to Salesforce. Users or employees at our school or colleges such as personal staff, teachers, and principals who need access to our school's records. Every user in Salesforce has a user account.

Milestone 8: Reports

A Report is created to exhibit a list of records related to students and parents which can be displayed in a graphical chart.

4. TRAILHEAD PROFILE PUBLIC URL

     Team Lead: https://trailblazer.me/id/sdhanasekaran7

     Team member 1:   https://trailblazer.me/id/nishm43

     Team Member 2:   https://trailblazer.me/id/pavithrapriya

     Team Member 3:   https://trailblazer.me/id/pramr18

5 ADVANTAGES AND DISADVANTAGES

     ADVANTAGES

- ❖ Increases the reputation of schools/colleges.
- ❖ It tracks and increases the number of students.
- ❖ Reduction in the cost of expenses.
- ❖ Improves the quality of educational services.
- ❖ History of work with each student.
- ❖ It helps educational organizations effectively manage and track leads resulting in improved enrolment numbers.

     DISADVANTAGES

- ❖ Some uneducated people not able to understand or identify.

6. APPLICATIONS

Contract lifecycle management (CLM) automates and streamlines contract processes during key stages. These stages include initiation, authoring, process, workflow, negotiation and approval, execution, ongoing management and compliance, and contract renewal. In this, we create a user Id in the Salesforce login and a trailblaze.me log in for clear and thorough study of school or college.

7. CONCLUSION

Using CRM in the education industry provides organizations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision–making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement, and many more.

8. FUTURE SCOPE

The future of CRM is about which companies will be able to pivot to meet the changing needs and trends – driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations in future.