PROJECT REPORT

1. INTRODUCTION

OVERVIEW:

WHAT IS CRM FOR EDUCATION?

Customer relationship management or CRM software enables educational institutions such as schools, colleges, and universities to manage relationships with students, parents, staff, alumni, and other stakeholders. It handles all aspects of the entire student lifecycle, from enrollment and academic progress tracking to fundraising management and reporting tools.
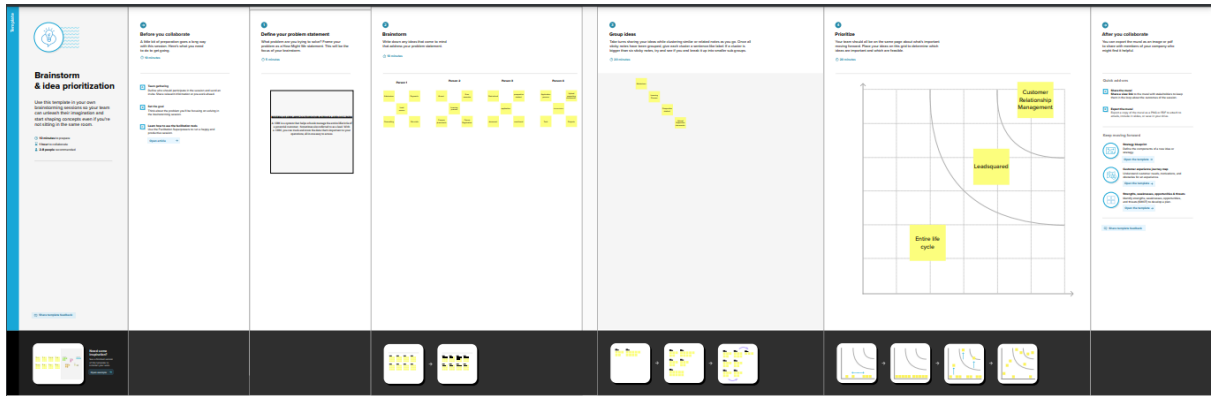
Some CRMs will integrate with other vital educational tools, such as learning management systems (LMS) and accounting software. In either case, the aim is to improve communication, efficiency, and, ultimately, student outcomes by equipping students, parents, and teachers with the necessary information.

PURPOSE:

- Tracking student interactions with your website, social media, or other online platforms enables you to deliver the right information to them at the right time.
- A CRM like monday sales CRM simplifies direct communication with departments, creating personalized content for outreach and providing the course-relevant information they seek.
- When a prospective student sends a message via the college website contact page or on social media, the CRM platform makes it easy for staff members to respond immediately.

- Your CRM platform will improve the admission process, reducing the need for paperwork, spreadsheets, and extra staff to sort through traditional applications. Individuals complete their applications on the platform and upload the required documents, resulting in a positive user experience.

2. PROBLEM DEFINITION & DESIGN THINKING

IDEATION & BRAINSTORMING MAP

3. RESULT

DATA MODEL:

OBECT NAME	FIELDS IN THE OBJECT
School Object	<table><tr><td>**FIELD LABEL**</td><td>**DATA TYPES**</td></tr><tr><td>Phone number</td><td>Phone</td></tr><tr><td>Number of Students</td><td>Roll-up summary</td></tr><tr><td>Highest Marks</td><td>Roll-up summary</td></tr></table>
Student Object	<table><tr><td>**FIELD LABEL**</td><td>**DATA TYPE**</td></tr><tr><td>Phone</td><td>Phone Number</td></tr><tr><td>School</td><td>Master-Detail Relationship</td></tr><tr><td>Results</td><td>Picklist</td></tr><tr><td>Class</td><td>Number</td></tr></table>

Parent Object		
	FIELD LABEL	**DATA TYPE**
	Parent Address	Text Area
	Parent Number	Field

ACTIVITY & SCREENSHOT:
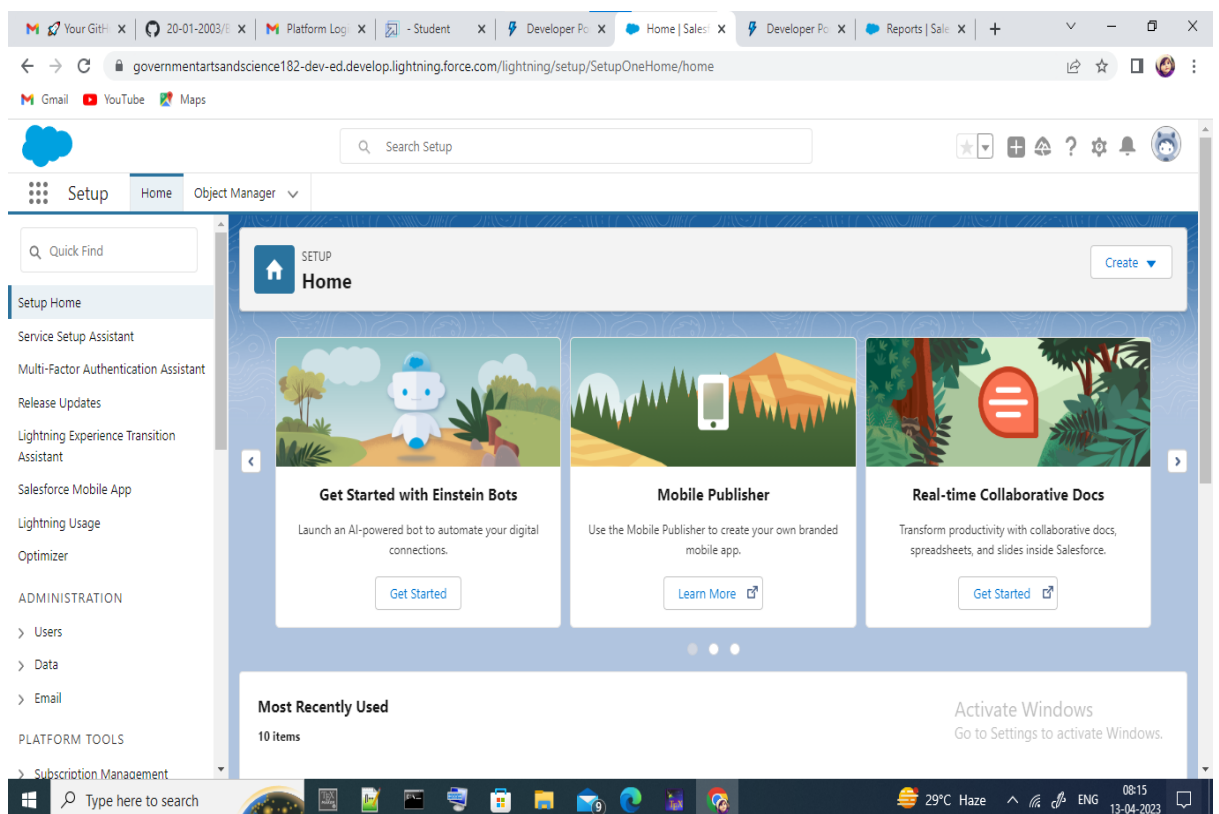
Creating salesforce developer account.
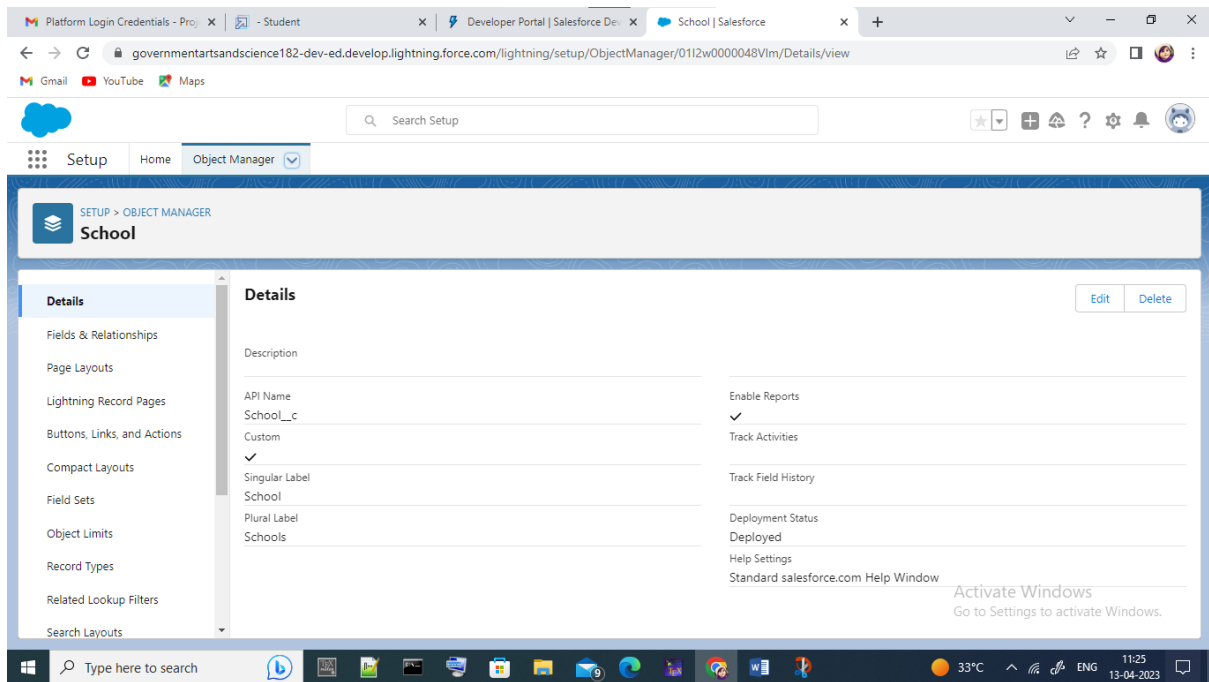
Creation of school object
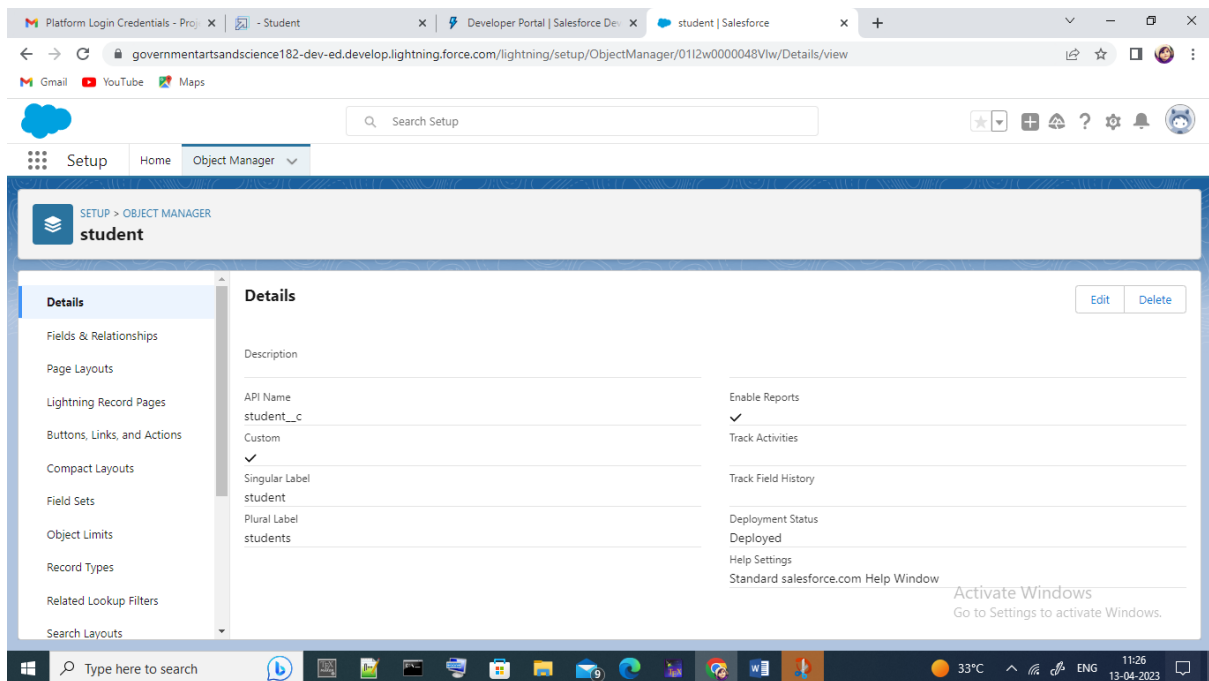
Creation of student object
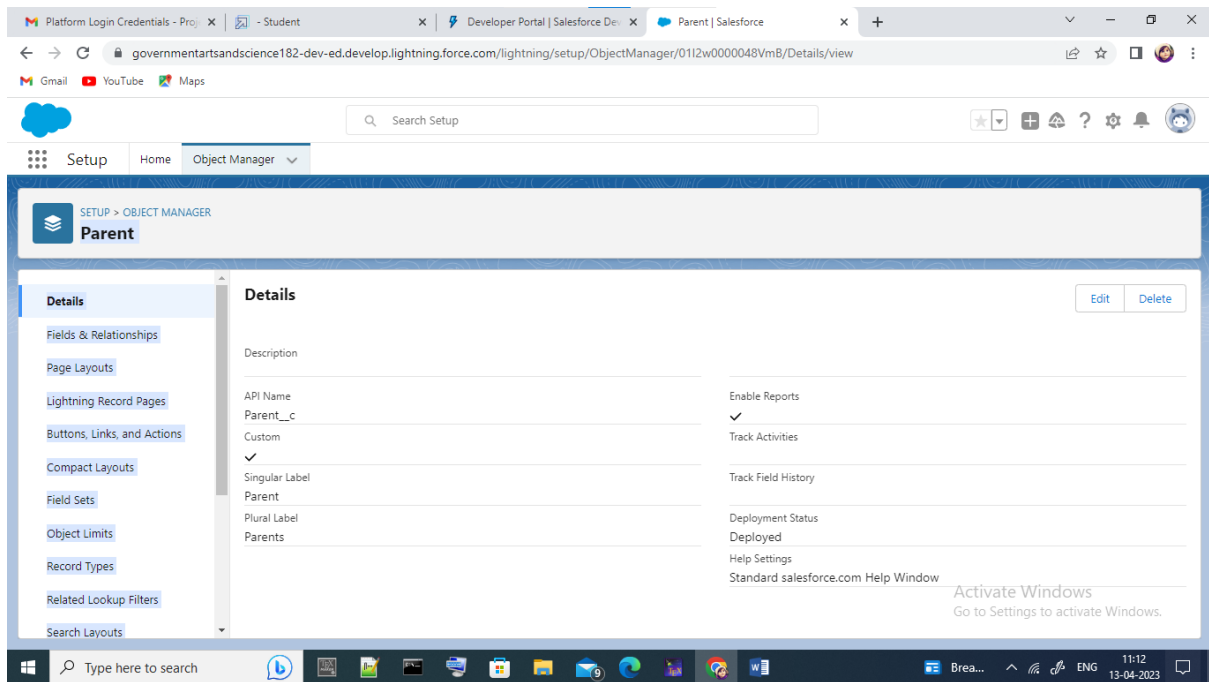
Creation of parent object
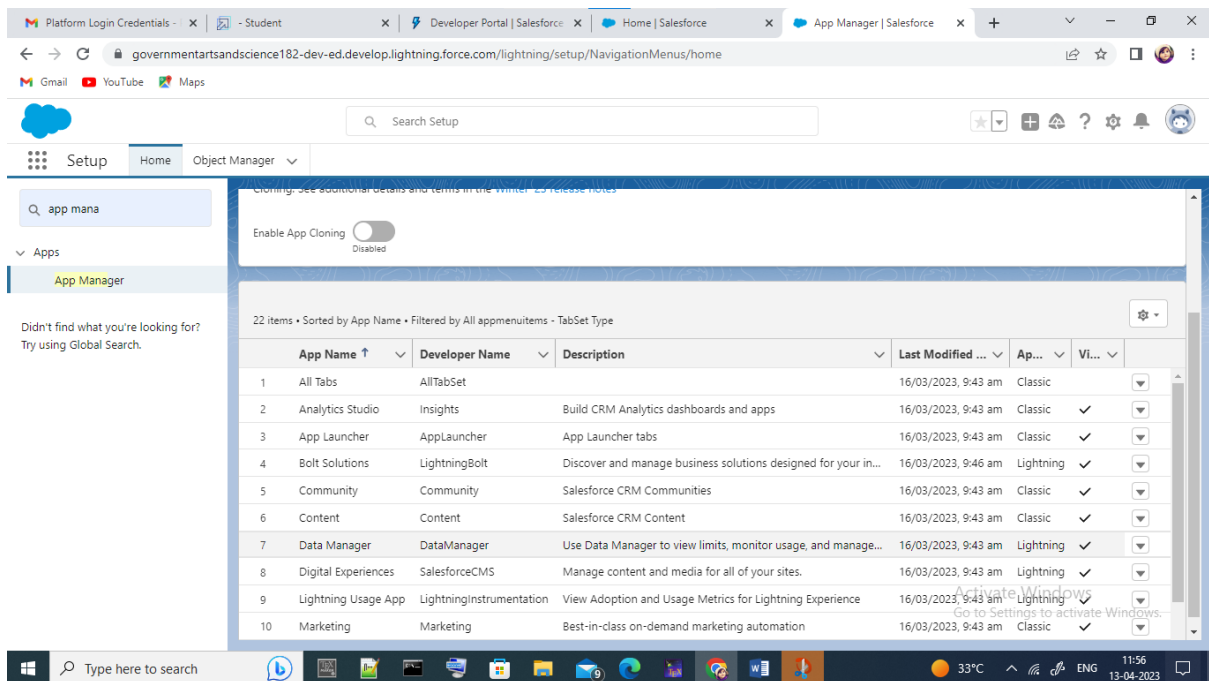
Creation of the school management app

Creation of Fields for the school objects

Creation of Fields for the student objects

Creation of Fields for the parent objects

Creation on Profile

Creation of the users

Creation of permission sets
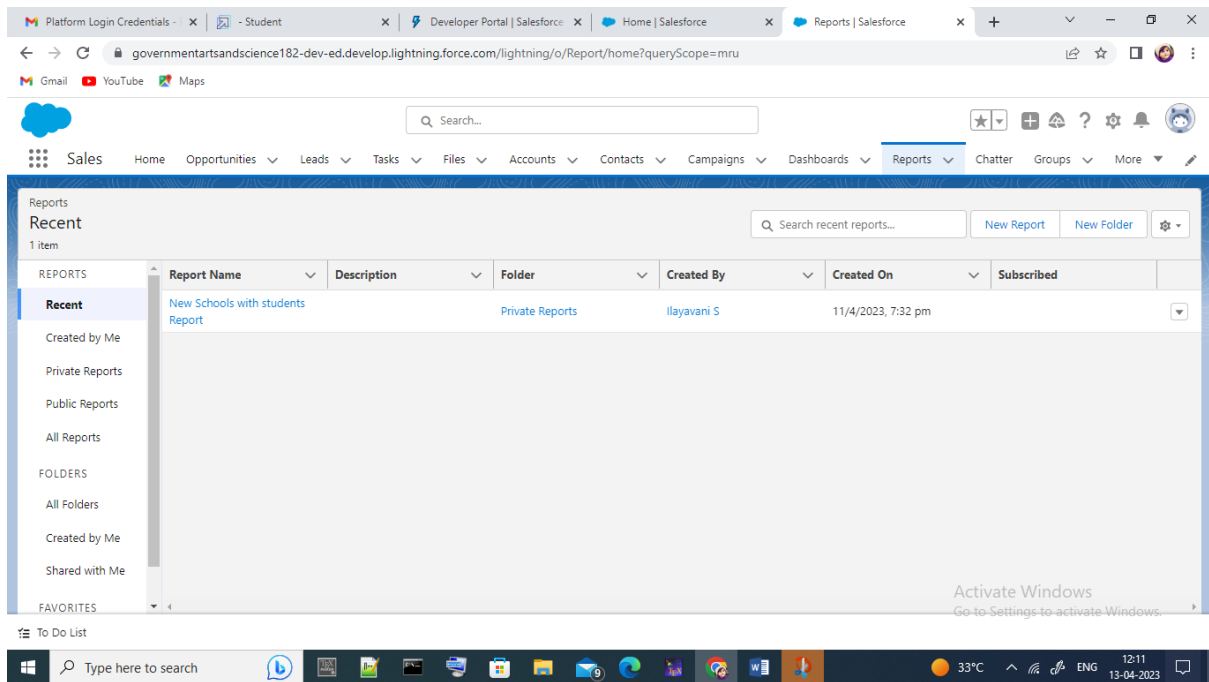
Report

4.TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD - https://trailblazer.me/id/babym9

TEAM MEMBER 1 – https://trailblazer.me/id/ivani44

TEAM MEMBER 2 - https://trailblazer.me/id/llogeshwari2

TEAM MEMBER 3 - https://trailblazer.me/id/ssambasivam7

5. ADVANTAGES & DISADVANTAGES

ADVANTAGES	DISADVANTAGES
It allows for the consolidation of customer data and the basis for deep insights.	Customer experience may worsen due to staff over-reliance on the system.
It speeds up the sales conversion process	• Security and data protection issues with centralised data.
It increases staff productivity, lowering time-cost.	The excess initial time and productivity cost at the implementation.
It allows geographically dispersed teams to collaborate effectively.	Requires a process-driven sales organisation.
Improves customer experience by allowing personalisation and improved query resolution	CRM may not suit all businesses.

6. APPLICATIONS

Create a **Smooth and Simple Admission Process** from collecting the **student inquiries** to **completing the admission** with lots of automation. You can add & manage all the related documents, convert a student inquiry to prospects, perform much more automation & automatically nurture them to admissions using the **Best CRM for Educational Institutions** & Training Institutes.

7. CONCLUSION:

CRM for higher education plays an important role in the automation of the institute's communication and processes. It helps them to connect with the interested and talented students who are seeking courses and programs based on their interests, affordability, and other parameters. Also, it reduces the manual tedious processes and improves the efficiency of the employees working there.

8. FUTURE SCOPE:

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.