

# **PROJECT REPORT**

## **THE CRM APPLICATION FOR SCHOOLS AND COLLEGES**

### **1 INTRODUCTION**

#### **1.1 OVERVIEW**

*CRM stands for customer relationship management and for schools and colleges, a single CRM solution can be implemented to unify and to manage all contacts from prospective students to enrolled students to alumni and donors. CRM helps to easily contact with parents. Centralizing this data allows schools to have a 360 degree view of their constituents.*

#### **1.2 PURPOSE**

- *To manage their lead funnel by automating lead capture, lead scoring, and lead nurturing.*
- *Integrate with student information systems, learning management systems, and financial management systems.*
- *communication between school and parents via email, SMS, and social media integration.*
- *Provides lead management, student and parent profiles, communication tools, analytics and reporting, and integration with other systems.*

### **2 PROBLEM DEFINITION & DESIGN THINKING**

#### **2.1 EMPATHY MAP**

## Says

What have we heard from  
say? What can we imagine  
them saying?

How do we  
know what  
they are saying?

How do we  
know what  
they are saying?

How do we  
know what  
they are saying?

How do we  
know what  
they are saying?



OSM  
Application for schools  
and colleges



## Thinks

What are their wants, needs, hopes,  
and dreams? What other thoughts  
might influence their behavior?

How do we  
know what  
they are thinking?

How do we  
know what  
they are thinking?

How do we  
know what  
they are thinking?

How do we  
know what  
they are thinking?



How do we  
know what  
they are thinking?

How do we  
know what  
they are thinking?

How do we  
know what  
they are thinking?

## Feels

What are their fears, discomforts, and  
anxieties? What other feelings might  
influence their behavior?

## Does

What behavior have we observed?  
What can we imagine them doing?

How do we  
know what  
they are doing?

How do we  
know what  
they are doing?

How do we  
know what  
they are doing?

## 2.2 IDEATION AND BRAINSTORM

### Brainstorm & idea prioritization

Use this template in your next brainstorming session so your team can unleash their imagination and start shaping concepts even if you're not taking in the same ideas.

- 10 minutes
- 1 person
- 1 page

#### Before you collaborate

A little bit of preparation goes a long way with this session. Think about what you need to be getting going.

- 1. Get ready: Have everyone participate in the session and avoid any distractions.
- 2. Set the goal: Have everyone agree on the focus of the session and the outcome you want to achieve.
- 3. Set the rules: Have everyone agree on the rules of the session, such as no criticism, no self-censoring, and no holding back.

#### Define your problem statement

What problem are you trying to solve? Frame your problem as a clear, specific statement. This will be the focus of your brainstorm.

How to use this template: Write your problem statement in the box below.

#### Brainstorm

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

How to use this template: Write your ideas in the boxes below. Each box is for one idea. Write the idea in the box, and then write a brief description of the idea in the box below it.

#### Group ideas

Take time during your session to cluster similar or related ideas as you go. Once all ideas have been generated, you can cluster and refine the ideas. It's a good idea to have someone else look at your ideas and help you refine them.

How to use this template: Write your ideas in the boxes below. Each box is for one idea. Write the idea in the box, and then write a brief description of the idea in the box below it.

#### Prioritize

Now that you have all the ideas, it's time to prioritize them. Use the matrix below to rank each idea based on its importance and feasibility. The ideas with the highest scores are the ones you should focus on.

How to use this template: Write your ideas in the boxes below. Each box is for one idea. Write the idea in the box, and then write a brief description of the idea in the box below it.

#### After you collaborate

You can export the results of your session as a PDF or a CSV file. You can also use the results to create a presentation or a report.

How to use this template: Write your ideas in the boxes below. Each box is for one idea. Write the idea in the box, and then write a brief description of the idea in the box below it.

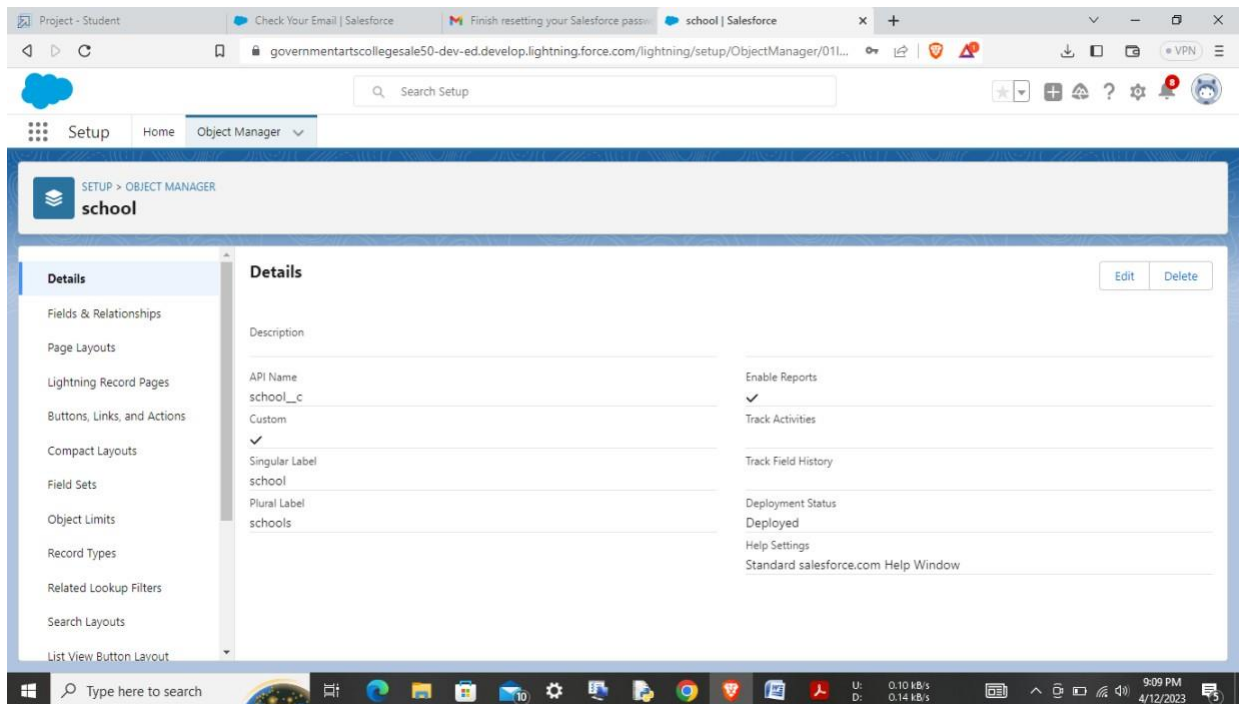
### 3 RESULT

#### 3.1 DATA MODEL

<i>Object name</i>	<i>Fields in the object</i>	
<i>School object</i>	<i>Field label</i>	<i>Data type</i>
	1.Address 2.District 3.State 4.School websites	Test Area
	1.Phone Number	Phone
	1.Number of Students 2.Highest mark	Roll Up Summary
<i>Student object</i>	<i>Field label</i>	<i>Data type</i>
	1.Phone Number	Phone
	1.School	Master Detail Relationship
	1.Results	Pick List
	1.Class 2.Mark	Number

<b><i>Parent object</i></b>		
	<b><i>Field label</i></b>	<b><i>Data type</i></b>
	<b><i>1.Parent Address</i></b>	<b><i>Text Area</i></b>
	<b><i>1.Parent Number</i></b>	<b><i>Phone</i></b>

### 3.2ACTIVITY &SCREENSHOT



Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pass... | Student | Salesforce

governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01L...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Student**

**Details** Edit Delete

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

**Details**

Description

API Name  
student\_\_c

Custom  
✓

Singular Label  
Student

Plural Label  
Students

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Type here to search

9:10 PM 4/12/2023

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pass... | Parent | Salesforce

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Description

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Deployed

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9:11 PM 4/12/2023

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce passw... | school | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

school

Details

**Fields & Relationships**

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		
Number of Students	Number_of_Student__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		

Type here to search

9:12 PM 4/12/2023

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce passw... | Student | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

Details

**Fields & Relationships**

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		
Phone Number	Phone_Number__c	Phone		
Results	Result__c	Picklist		
school	school__c	Master-Detail(school)		✓
student Name	Name	Text(80)		✓

Type here to search

9:12 PM 4/12/2023

Setup > OBJECT MANAGER

Parent

Details

**Fields & Relationships**

6 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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 Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

School Management

schools Students Parents Reports Dashboards

schools

**Recently Viewed**

0 items • Updated a few seconds ago

Search this list...

school Name

You haven't viewed any schools recently.  
Try switching list views.



Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce profile | Profiles | Salesforce | Profiles - Salesforce - Developer | + | - | x

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/00e7setupid=EnhancedProfiles&appLayout=... | VPN

salesforce | Search... | Search | Switch to Lightning Experience | HARIHARAN P | Setup | Help | Content

Home Chatter Libraries Content Subscriptions schools Students Parents +

Quick Find / Search... | Expand All | Collapse All

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Get Started

Salesforce Mobile Quick Start

Home

Administer  
Release Updates  
Manage Users  
Users  
Mass Email Users  
Roles  
Permission Sets  
Permission Set Groups  
User Management Settings

## Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile | A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Delete	School Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 7 | 0 Selected | << Previous Next >> | Page 1 of 1

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce profile | Users | Salesforce | parents - Salesforce - Developer | + | - | x

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/005?isUserEntityOverride=1&appLayout=s... | VPN

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Quick Find / Search... | Expand All | Collapse All

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## parents

Help for this Page

On this page you can create, view, and manage users.  
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: parents | Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Username	Alias	Active	Role	Profile
<input type="checkbox"/> Edit   Chatter Expert	chatter_00d2v00000rocd9eai	iy2d1y18vnm@chatter.salesforce.com	Chatter	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/> Edit   haran_hari	haran_hari	haran_hari@gmail.com	hari	<input checked="" type="checkbox"/>		School Profile
<input type="checkbox"/> Edit   P_HARIHARAN	P_HARIHARAN	hariharan0575@gmail.com	HP	<input checked="" type="checkbox"/>		System Administrator
<input type="checkbox"/> Edit   User_Integration	User_Integration	integration@00d2v00000rocd9eai.com	integ	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
<input type="checkbox"/> Edit   User_Security	User_Security	insightssecurity@00d2v00000rocd9eai.com	sec	<input checked="" type="checkbox"/>		Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pa | Permission Sets | Salesforce | Permission Sets ~ Salesforce x

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salesforce '23

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Home | Chatter | Libraries | Content | Subscriptions | schools | Students | Parents +

Quick Find / Search... | Expand All | Collapse All

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## Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets | Edit | Delete | Create New View

New			
Action	Permission Set Label	Description	License
Del   Clone	teacher_permission		

1-1 of 1 | 0 Selected | Previous | Next | Page 1 of 1

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pa | Permission Sets | Salesforce | Permission Sets ~ Salesforce x

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## Permission Sets

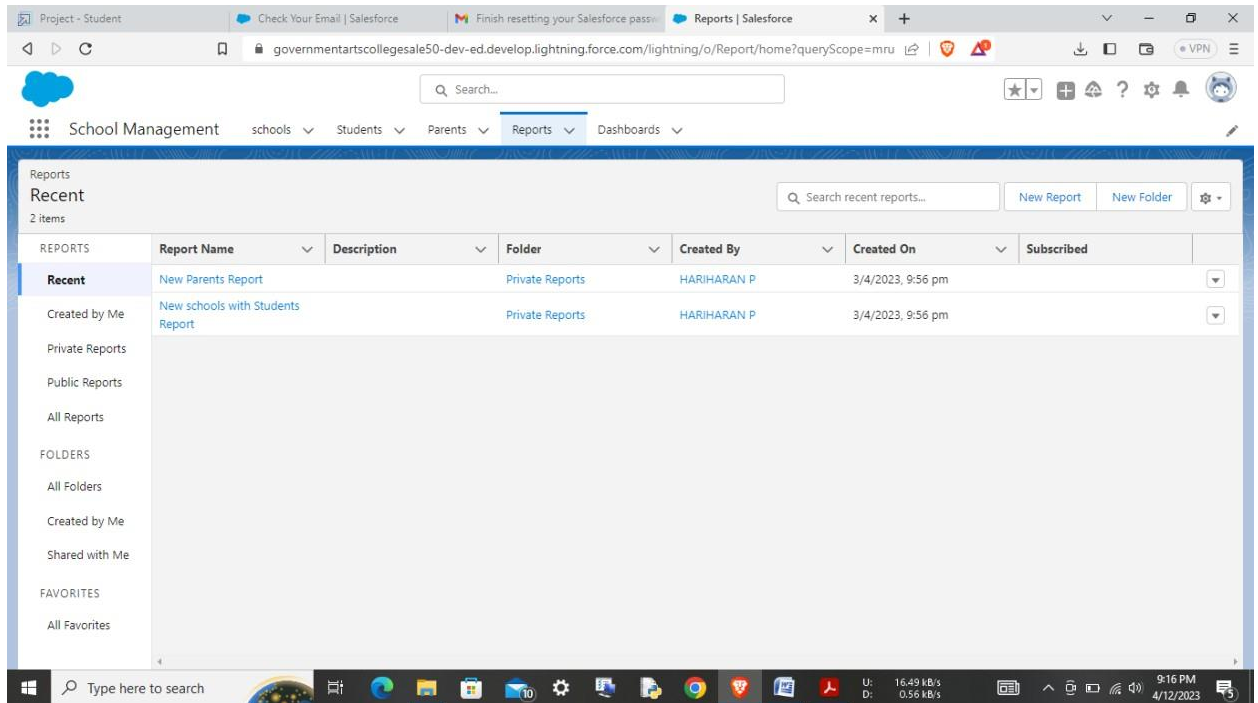
On this page you can create, view, and manage permission sets.

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All Permission Sets | Edit | Delete | Create New View

New			
Action	Permission Set Label	Description	License
Del   Clone	Principal_permission		

1-1 of 1 | 0 Selected | Previous | Next | Page 1 of 1



#### 4 TRAILHEAD PROFILE PUBLIC URL

**Vignesh.v** (Team lead) : <https://trailblazer.me/id/vigneshvv1311>

**Vetrivel.m** (Team member1): <https://trailblazer.me/id/strailhead>

**Ravi.m**(Team member2 ) : <https://trailblazer.me/id/ravi3344>

**Mariyappan**(Team member3) : <https://trailblazer.me/id/mariyappancc123>

#### ADVANTAGES & DISADVANTAGES

##### 4.1 ADVANTAGES

- *Better communication: With a CRM application, schools and colleges can send targeted messages to students, parents, and staff members.*
- *This can help to ensure that everyone is aware of important dates, events, and deadlines.*
- *A CRM application can help schools and colleges to engage with students and parents in a more meaningful way.*
- *This can help to build stronger relationships and improve overall satisfaction with the institution.*

- *A CRM application can provide schools and colleges with valuable data about their students and other stakeholders.*
- *This data can be used to make more informed decisions about resource allocation, program development, and other strategic initiatives.*Top of Form

## **4.2DISADVANTAGES**

- *This can be a challenge for schools and colleges with limited IT resources.*
- *For a CRM application to be effective, it needs to be widely adopted by students, parents, and staff members.*
- *If there is resistance to using the application or if it is not user-friendly, it may not be effective.*
- *Collecting and storing personal information about students, parents, and staff members can raise privacy concerns. Schools and colleges need to ensure that they are complying with relevant data protection laws and taking appropriate measures to safeguard sensitive information.*

## **5 APPLICATION**

- *School*
- *Institutions*
- *Colleges*
- *Acadamy*
- *Universities*

## **6 Conclusion**

- *CRM application can help schools and colleges to improve communication, engagement, and efficiency, while also providing valuable data for decision-making.*
- *CRM application can offer many benefits, it is important for schools and colleges to carefully consider the potential disadvantages and to plan for a successful implementation that addresses these challenges.*

## **7 FUTURE SCOPE**

*The future of CRM (Customer Relationship Management) applications for schools and colleges is promising, as technology continues to advance and institutions look for more effective ways to manage interactions with students, parents, and staff members.*

*The CRM applications for schools and colleges is likely to be characterized by increased integration, automation, and personalization, as institutions look for ways to enhance relationships with their stakeholders and improve outcomes for students.*

*Thank you*