

A Customer Relationship Management Application for School and College

INTRODUCTION

1.1 Overview

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth. CRM systems compile customer data across different channels, or points of contact, between the customer and the company, which could include the company's website, telephone, live chat, direct mail, marketing materials and social networks. CRM systems can also give customer-facing staff member's detailed information on customers' personal information, purchase history, buying preferences and concerns.

Why CRM benefits businesses

The use of CRM systems can benefit organizations ranging from small businesses to large corporations, through:

- Having customer information such as past purchases and interaction history easily accessible can help customer support representatives provide better and faster customer service.
- Collection of and access to customer data can help businesses identify trends and insights about their customers through reporting and visualization features.
- Automation of menial, but necessary, sales funnel and customer support tasks.

Components of CRM

At the most basic level, CRM software consolidates customer information and documents it into a single CRM database so business users can more easily access and manage it. Over time, many additional functions have been added to CRM systems to make them more useful. Some of these functions include recording various customer interactions over email, phone, social media or other channels; depending on system capabilities, automating various workflow automation processes, such as tasks, calendars and alerts; and giving managers the ability to track performance and productivity based on information logged within the system.

- **Marketing automation.** CRM tools with marketing automation capabilities can automate repetitive tasks to enhance marketing efforts at different points in the lifecycle for lead generation. For example, as sales prospects come into the system, it might automatically send email marketing content, with the goal of turning a sales lead into a full-fledged customer.
- **Sales force automation.** Sales force automation tools track customer interactions and automate certain business functions of the sales cycle that are necessary to follow leads, obtain new customers and build customer loyalty.
- **Contact center automation.** Designed to reduce tedious aspects of a contact center agent's job, contact center automation might include prerecorded audio that assists in customer problem-solving and information dissemination. Various software tools that integrate with the agent's desktop tools can handle customer requests in order to cut down on the length of calls and to simplify customer service processes. Automated contact center tools, such as chatbots, can improve customer user experiences.
- **Geolocation technology, or location-based services.** Some CRM systems include technology that can create geographic marketing campaigns based on customers' physical locations, sometimes integrating with
- popular location-based GPS (global positioning system) apps. Geolocation technology can also be used as a networking or contact management tool in order to find sales prospects based on a location.

1.2 Purpose

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: **Improve business relationships**. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

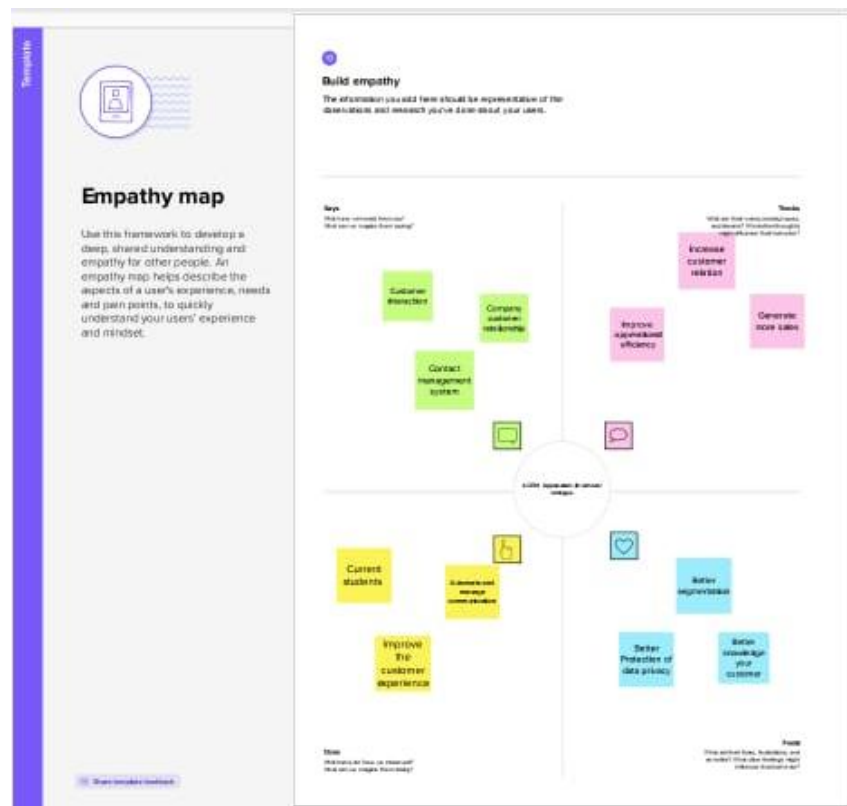
Customer relationship management (CRM) is any process, tool, or strategy that helps businesses to better access and organize customer data. As with many things, software makes CRM easier and faster. Therefore, in order to compete successfully in virtually any industry, you need reliable CRM software. The best CRM software will provide you with valuable insight into how your customers behave and what they need from you. It minimizes the risk of tasks, appointments, and notes being missed, which could hurt your business. You'll be able to track

the tasks you need to accomplish to keep your customers happy and close more sales. It also streamlines and simplifies business processes for any employee that interacts with your customers. In the long run, CRM software should improve your bottom line.

There are many choices to find the CRM software that works best for how you work and for your budget. We reviewed 15 CRM software companies to create our expert-chosen list of the seven best providers based on a variety of small business needs. Read on to learn where each software's strengths lie, as well as prices, integrations, reporting features, and more to help you make an informed decision.

2. .PROBLEM DEFINITION &DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming



3. RESULT

3.1 Data Model

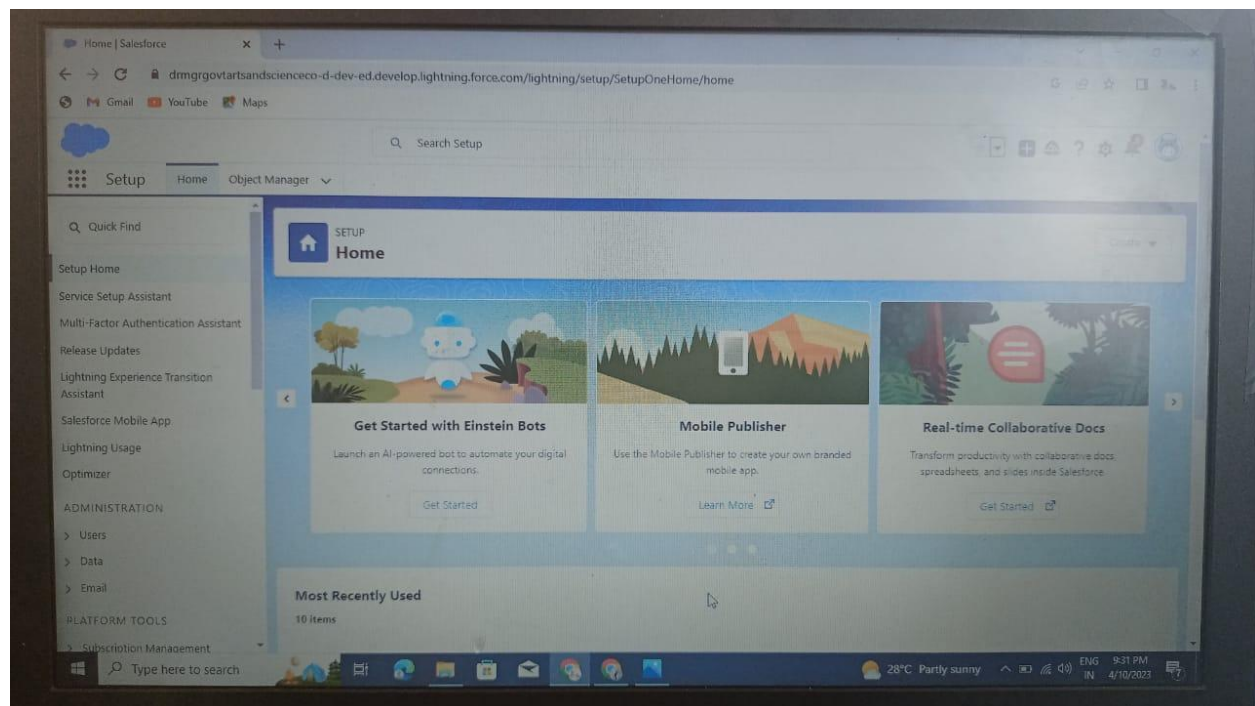
Object name	Field in the Object	
School	Field Label	Data type
	Address	Text Area (255)
	Created by	Look Up (User)
	District	Text Area (255)
	Last Modified by	Look up (User)
	Owner	Look Up (User,Group)
	School	Text Area (255)
	School name	Text (80)
	State	Text Area(255)
Parent	Field Label	Data type
	Created by	LookUp (User)
	Last Modified by	LookUp(User)
	Owner	LookUp(User,Group)
	Parent Address	Text Area (255)
	Parent Name	Text (80)
	Parent Number	Text (80)

Student	Field Label	Data Type
	Class	Number (18,0)
	Created by	LookUp (User)
	Last Modified by	LookUp (User)
	Mark	Number (18,0)
	Phone Number	Phone
	Result	Piclist
	School	Master-Detail (school)
	Student Name	Text (80)

3.2 Activity & Screenshot

Milestone- 1

What is salesforce?



Milestone- 2

Object

Activity-1

Creation

of

school

object

The screenshot shows the Salesforce Object Manager interface for the 'School' 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, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'School' object. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Address (Text Area(255)), Created By (Lookup(User)), Districts (Text Area(255)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), School (Text Area(255)), School Name (Text(80)), and State (Text Area(255)).

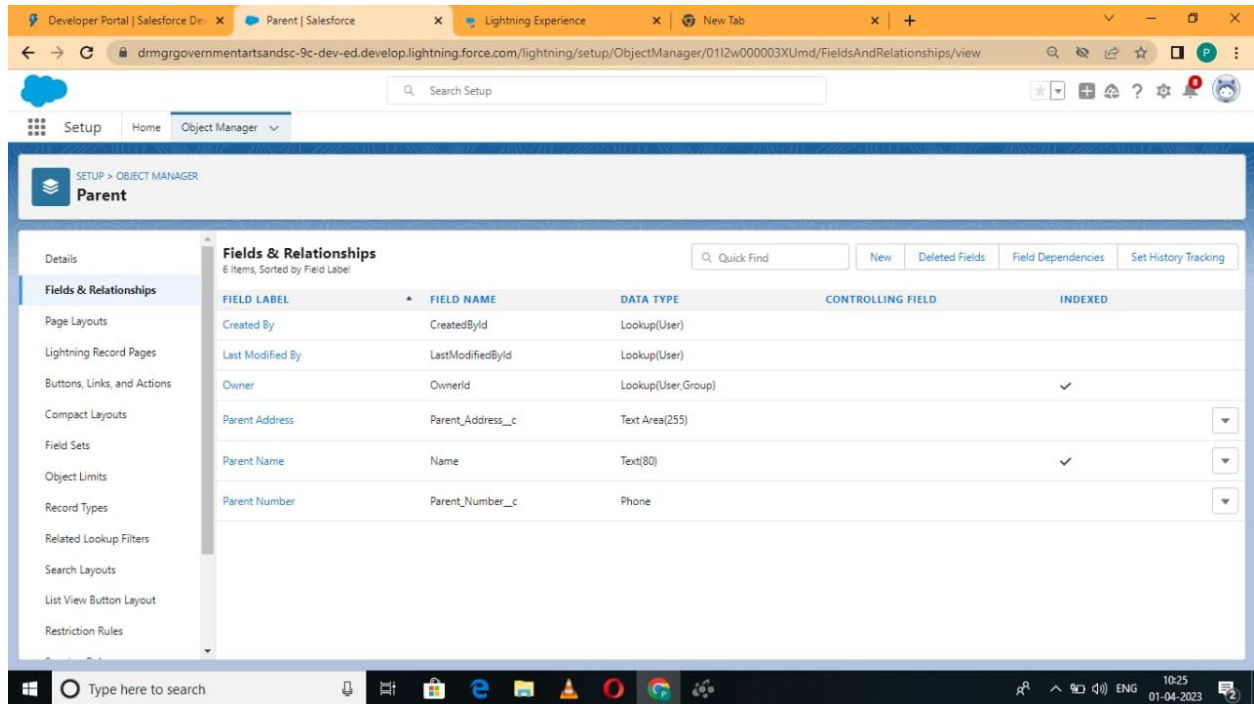
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Districts	Districts__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
School	School__c	Text Area(255)		
School Name	Name	Text(80)		✓
State	State__c	Text Area(255)		

Activity – 2 Create Student object

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, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Student' object. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Marks (Number(18, 0)), Phone Number (Phone), Results (Picklist), School (Master-Detail(School)), and Student Name (Text(80)).

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	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Activity – 3 Create Parent Object



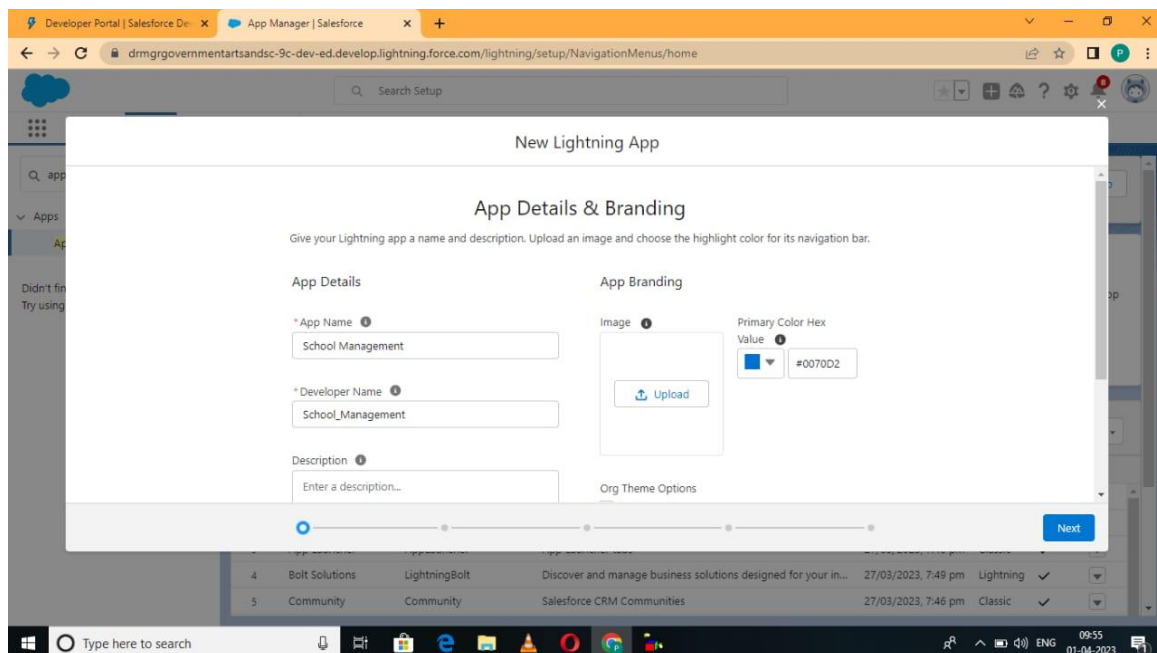
The screenshot shows the Salesforce Object Manager interface for a 'Parent' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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		

Milestone-3: Lightning App

Activity:

Create the school management App



The screenshot shows the 'New Lightning App' wizard in Salesforce. The 'App Details & Branding' section is active, displaying a form for creating a new app. The form includes fields for App Name, Developer Name, and Description. The App Name is 'School Management' and the Developer Name is 'School_Management'. The Description field is empty. The App Branding section includes an Image upload button and a Primary Color Hex value of #0070D2. The 'Next' button is visible at the bottom right of the wizard.

Milestone-4 Fields And Relationship

Activity -1

Creation of fields for the school objects

The screenshot shows the Salesforce Setup interface for the 'school' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are sorted by Field Label. The table below shows the details of the fields:

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)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Activity-2

Creation of fields for the student objects:

The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are sorted by Field Label. The table below shows the details of 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)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Activity-3

Creation of fields for the parent objects:

The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Address (Text Area(255)), Created By (Lookup(User)), Districts (Text Area(255)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), School (Text Area(255)), School Name (Text(80)), and State (Text Area(255)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Districts	Districts__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
School	School__c	Text Area(255)		
School Name	Name	Text(80)		✓
State	State__c	Text Area(255)		

Milestone – 5 Profile

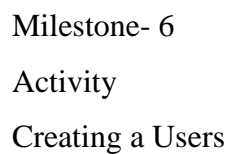
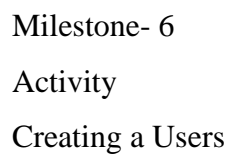
Activity

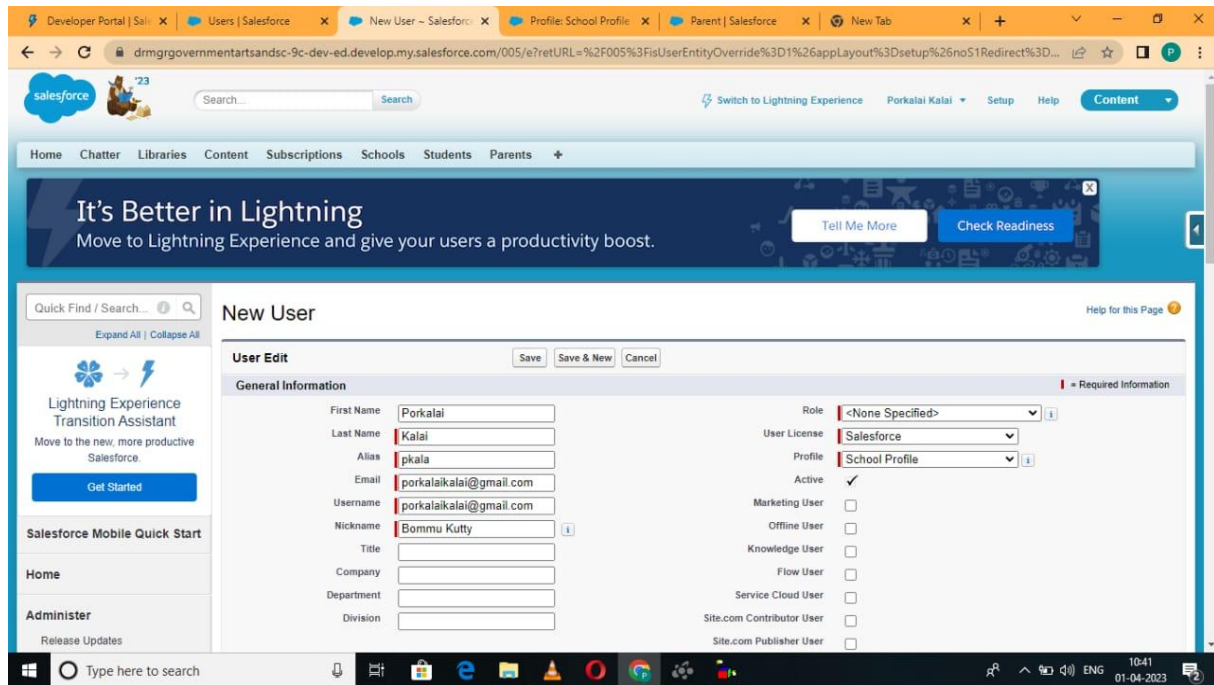
Creation on profile

The screenshot shows the 'Clone Profile' page in Salesforce. The page title is 'Clone Profile'. Below the title, there is a message: 'You must select an existing profile to clone from.' The page also displays a table with the following information:

Existing Profile	User License	Profile Name
Standard User	Salesforce	School Profile

Buttons for 'Save' and 'Cancel' are visible at the bottom of the table.

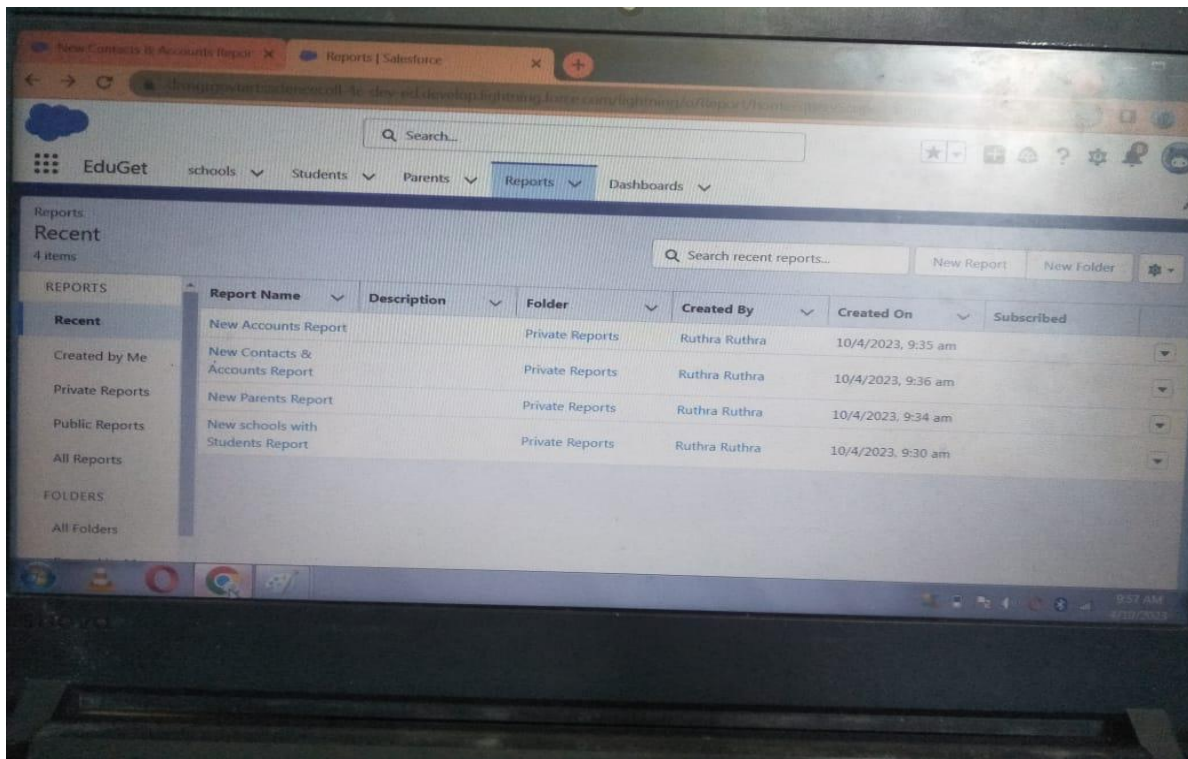




Milestone -8 : Reports

Activity :

Reports:



4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER-<https://trailblazer.me/id/rutra3>

TEAM MEMBER1-<https://trailblazer.me/id/nnisharajavel>

TEAM MEMBER2-<https://trailblazer.me/id/pkalai9>

TEAM MEMBER3-<https://trailblazer.me/id/rramya77>

5. ADVANTAGES & DISADVANTAGES

ADVANTAGES:

It's no more a secret that even educational institutions experience financial pressure in the present-day economy. Falling revenues and rising operational costs entailed by the ever-changing and competitive market are the significant reasons behind this. Educational institutions keen on harmonizing the situation and instilling the balance are turning to customer relationship management (CRM) software.

An efficient CRM for education industry can establish and manage good relationships with students and alumni, better understanding among different teams, and, eventually, increase the ROI.

DISADVANTAGES:

- CRM costs. One of the greatest challenges to CRM implementation is cost. ...
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...
- Poor communication. ...
- Lack of leadership.

6. APPLICATIONS:

Customer relationship management (CRM) is a **set of integrated, data-driven software solutions that help manage, track, and store information related to your company's current and potential customers.**

Applications of a CRM – Examples and Strategies

- Applications of a CRM – Examples and Strategies.
- Application 1: Tracking Customers.
- Application 2: Collecting Data for Marketing.
- Application 3: Improving Interactions and Communications.
- Application 4: Streamlining Internal Sales Processes

7. CONCLUSIONS:

Customer Relationship Management **enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.**

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. **FUTURE SCOPE:**