

## 1 INTRODUCTION

### 1. Overview

Customer Relationship Management software enables educational institutions such as school, colleges and universities to manage relationships with students, parents, staff, alumni and other stakeholders.

### 2. Purpose

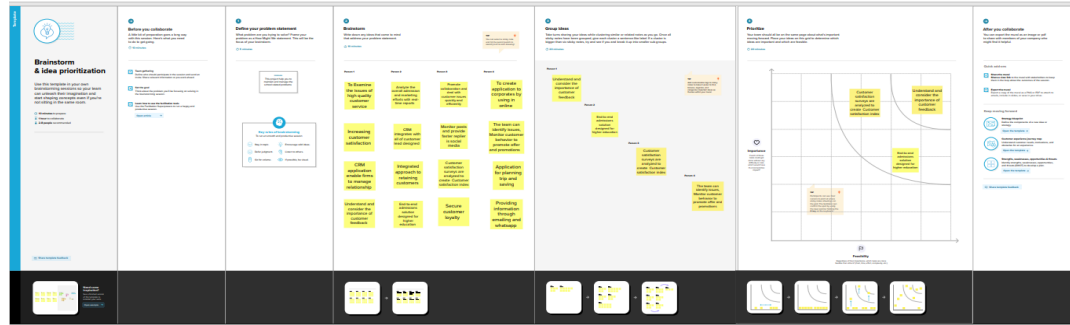
Customer Relationship Management is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: **Improve business relationships**. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

## 2 Problem Definition & Design Thinking

### 1. Empathy Map



### 2.Ideation & Brainstorming Map



## 3.RESULT

### 3.1Data Model:

Object name	Fields in the Object	
School A c t i v e	Field label	Data type
	Address	Text area
	District	Text area
Student i d e n t i f i c a t i o n &	Field label	Data type
	Phone number	Phone
	school	Master-detail relationship
Parents c r e a t e	Field label	Data type
	Parents address	Text area
	Parents number	Phone

### 3.2 Activity & Screenshot

school

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

school

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name  
school\_\_c

Custom  
✓

Singular Label  
school

Plural Label  
schools

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit

Delete

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

school

Details

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Search Layouts

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Address	Address__c	Text Area(255)	
Created By	CreatedById	Lookup(User)	
district	district__c	Text Area(255)	
Last Modified By	LastModifiedById	Lookup(User)	
Number of student	Number_of_student__c	Roll-Up Summary (COUNT students)	
Owner	OwnerId	Lookup(User,Group)	✓
school	school__c	Text Area(255)	
School Name	Name	Text(80)	✓
state	state__c	Text Area(255)	

student

# Project Report Template

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

students

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Edit

Delete

Description

API Name

studentname\_\_c

Custom

✓

Singular Label

students

Plural Label

students

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

students

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

14 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Address	Address__c	Text Area(255)	
class	number__c	Number(18, 0)	
Created By	CreatedById	Lookup(User)	
district	district__c	Text Area(255)	
Last Modified By	LastModifiedById	Lookup(User)	
marks	marks__c	Number(18, 0)	
phone number	phone_number__c	Phone	
result	result__c	Picklist	

## parent

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Edit

Delete

Description

API Name

Parent\_\_c

Custom

✓

Singular Label

Parent

Plural Label

Parents

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Q 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

## 4 Trailhead Profile Public URL

Team Member 1 - <https://trailblazer.me/id/sbalaji88>

Team Member 2 - <https://trailblazer.me/id/pranv18>

Team Member 3 - <https://trailblazer.me/id/pbala225>

Team Member 4 - <https://trailblazer.me/id/vallt1>

## 5 **ADVANTAGES & DISADVANTAGE**

### **Advantages :**

A CRM system can help educational organizations effectively manage and track leads, resulting in improved enrollment numbers.

Additionally by personalizing communication and providing automated follow up , educational organization can build better relationships with students and leads, and keep them engaged over time.

### **Disadvantages :**

CRM costs. one of the greatest challenges to CRM implementation is cost.

Business culture. A lack of commitment or resistant to cultural change from people within the company can cause major difficulties with CRM implementation.

## 6 **APPLICATIONS**

An education customer relationship management software manages all of a institution's interactions with prospective and current students.

It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution.

## 7 **CONCLUSION**

Customer Relationship management enables a company to align its strategy with 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.