

# PROJECT REPORT

## THE CRM APPLICATION FOR SCHOOLS AND COLLEGES

### 1 INTRODUCTION

#### 1.1 OVERVIEW

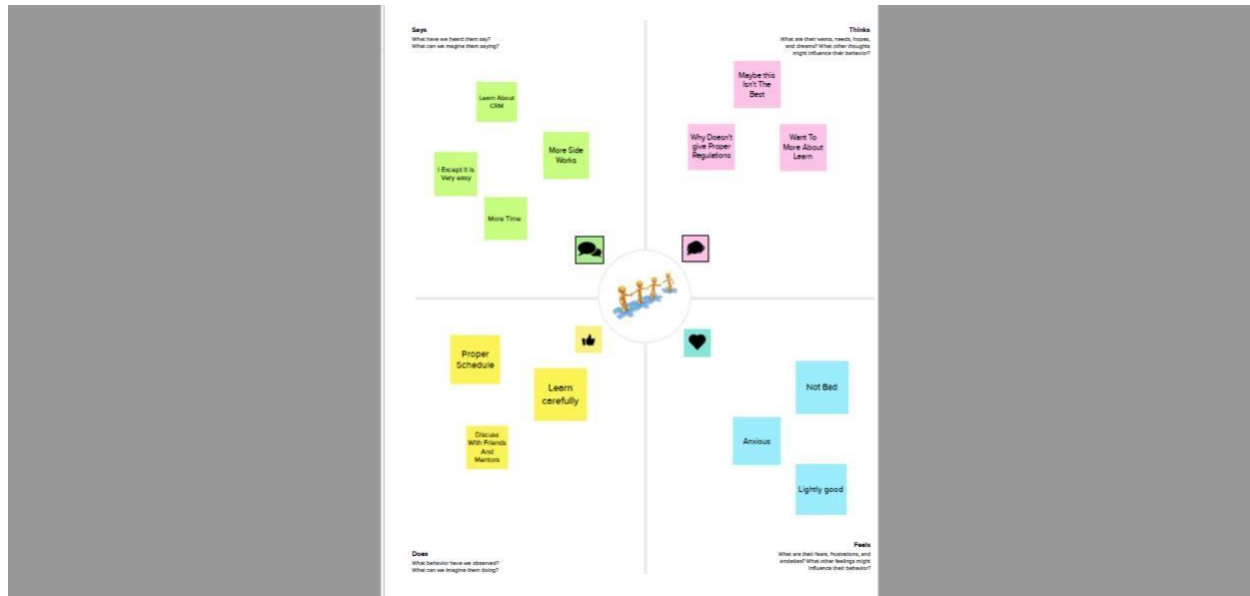
CRM stands for customer relationship management and for schools and colleges, a single CRM solution can be implemented to unify and to manage all contacts from prospective students to enrolled students to alumni and donors. CRM helps to easily contact with parents. Centralizing this data allows schools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



## 2.2 IDEATION AND BRAINSTORM

### 1 Define your problem statement

What problem are you trying to solve? Frame your problem as a how might the statement. This will be the focus of your ideation.

15 minutes

Problem: How to create a CRM experience for students and colleges

Key value of the ideation: To see an overall and personalized solution

Easy to use, Personalized and relevant, Easy to integrate, Clear to follow, Go for volume, If possible, no need

### 2 Brainstorm

What does this look like that could be used to address your problem statement?

10 minutes

#### Person 1

The CRM is a tool that helps students and colleges to connect and communicate with each other.

It is a tool that helps students and colleges to connect and communicate with each other.

It is a tool that helps students and colleges to connect and communicate with each other.

#### Person 2

The CRM is a tool that helps students and colleges to connect and communicate with each other.

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#### Person 3

The CRM is a tool that helps students and colleges to connect and communicate with each other.

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#### Person 4

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### 3 Group ideas

Now take existing your ideas while clustering similar or related ideas as you go. Once all sticky notes have been grouped, give each cluster a sentence that sums it up. Cluster's bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

10 minutes

- Enables you to send targeted and personalised communications to prospective students, such as emails and text messages
- You need a virtual assistant who would answer the queries with high relevance and zero error
- The process of building connections with prospective students may feel more like an art than a precise science, but with CRM it's possible to shift that balance
- Higher education CRMs can increase your enrollment, and boost conversion, graduation rates, and revenue

### 4 Prioritize

Your team should sit in on the same page about what's important, looking forward. Place your ideas on the grid to determine which ideas are important and which are feasible.

10 minutes

Importance

Feasibility

Aligns with the company's overall mission. Make sure that the idea aligns with the company's mission.

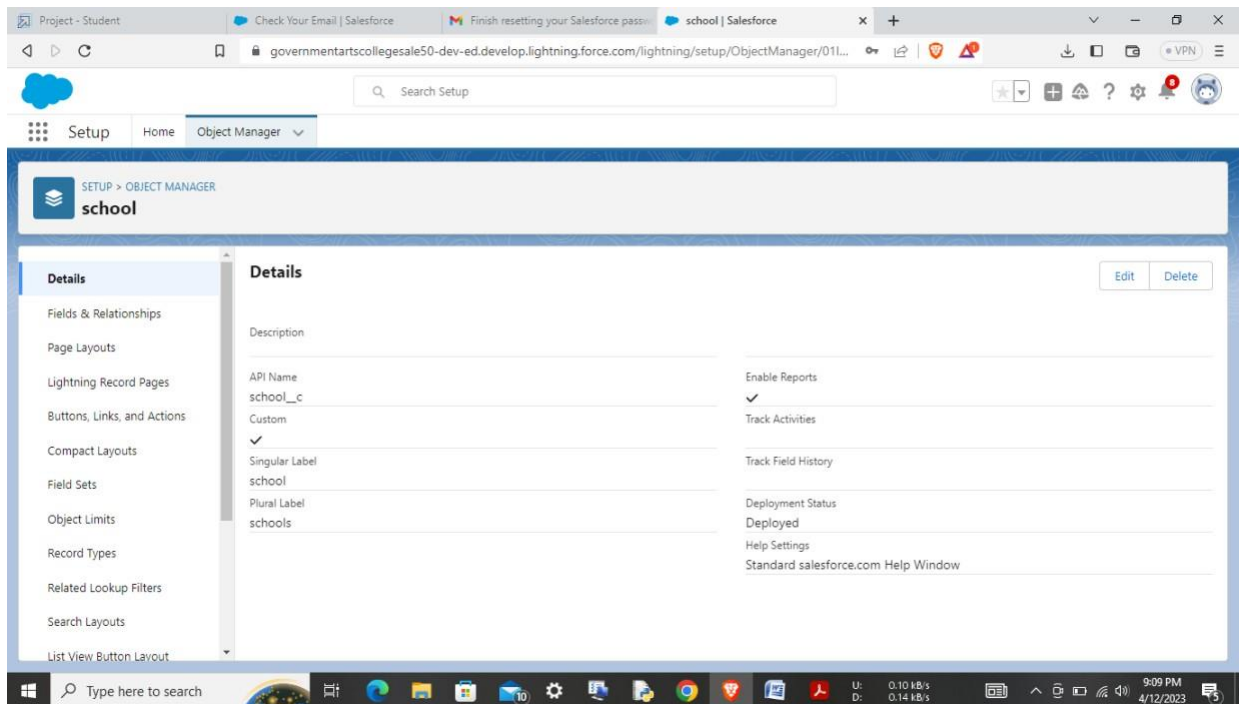
### 3 RESULT

#### 3.1 DATA MODEL

<i>Object name</i>	<i>Fields in the object</i>										
	<table> <tr> <th><i>Field label</i></th><th><i>Data type</i></th></tr> <tr> <td>1.Address 2.District 3.State 4.School websites</td><td>Test Area</td></tr> <tr> <td>1.Phone Number</td><td>Phone</td></tr> <tr> <td>1.Number of Students 2.Highest mark</td><td>Roll Up Summary</td></tr> </table>	<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		
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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

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

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Setup Home Object Manager

SETUP > OBJECT MANAGER  
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Deployed

Help Settings  
Standard salesforce.com Help Window

Type here to search

9:11 PM 4/12/2023

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

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

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 pass... | Student | Salesforce

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

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

**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.

New Import Change Owner



Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce pa | Profiles | Salesforce | Profiles - Salesforce - Develo

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

salesforce

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

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

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

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   Del...	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 pa | Users | Salesforce | parents - Salesforce - Develo

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

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Search...

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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

Action	Full Name	Username	Alias	Active	Role	Profile
<input type="checkbox"/> Edit	Chatter Expert	chatty_00d2v00000rocd9eai1y2d1y18vnm@chatter.salesforce.com	Chatter	<input checked="" type="checkbox"/>		Chatter Free User
<input type="checkbox"/> Edit	haran_hari	haraharan7503@gmail.com	hari	<input checked="" type="checkbox"/>		School Profile
<input type="checkbox"/> Edit	P_HARIHARAN	haraharanhos8575@gmail.com	HP	<input checked="" type="checkbox"/>		System Administrator
<input type="checkbox"/> Edit	User_Integration	integration@00d2v00000rocd9eai.com	integ	<input checked="" type="checkbox"/>		Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	insightssecurity@00d2v00000rocd9eai.com	sec	<input checked="" type="checkbox"/>		Analytics Cloud Security User

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



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

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/OPS?appLayout=setup&noS1Redirect=true

salesforce '23

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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## 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

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/OPS?appLayout=setup&noS1Redirect=true

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

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## Permission Sets

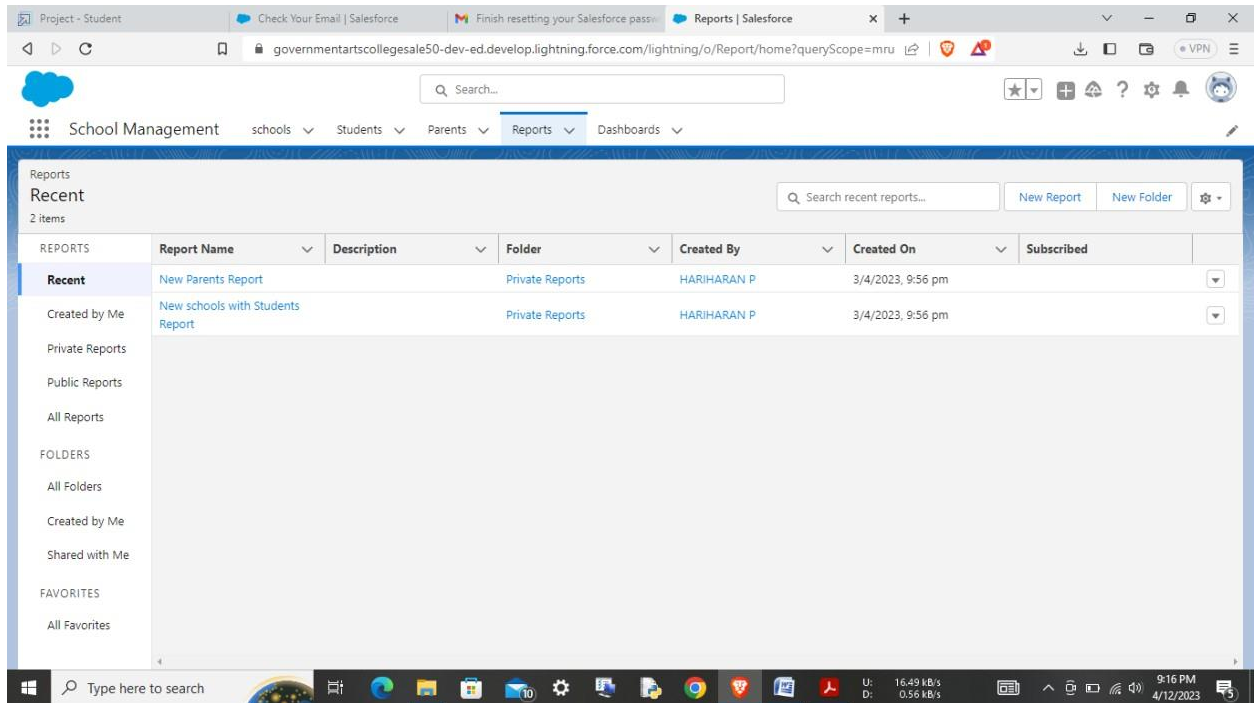
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All Permission Sets | Edit | Delete | Create New View

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

**Arulkumar.B (Team lead)** : <https://trailblazer.me/id/uarulkumarp>  
**Mukesh.U (Team member1)** : <https://trailblazer.me/id/jmukesh1>  
**Gnanaprakash. S (Team member2)**: <https://trailblazer.me/id/ugnanaprakashs>  
**Dinesh. R (Team member3)** : <https://trailblazer.me/id/dinesh0054>  
**Gubenthuran.C (Team member 4)** : <https://trailblazer.me/id/msdm>

## 5 ADVANTAGES & DISADVANTAGES

### 5.1 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

## **5.2DISADVANTAGES**

- *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.*

## **6 APPLICATION**

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

## **7 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.*

## **8 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*