A CRM APPLICATION FOR SCHOOLS / COLLEGES

1.INDRODUCTION

1.1 Overview :

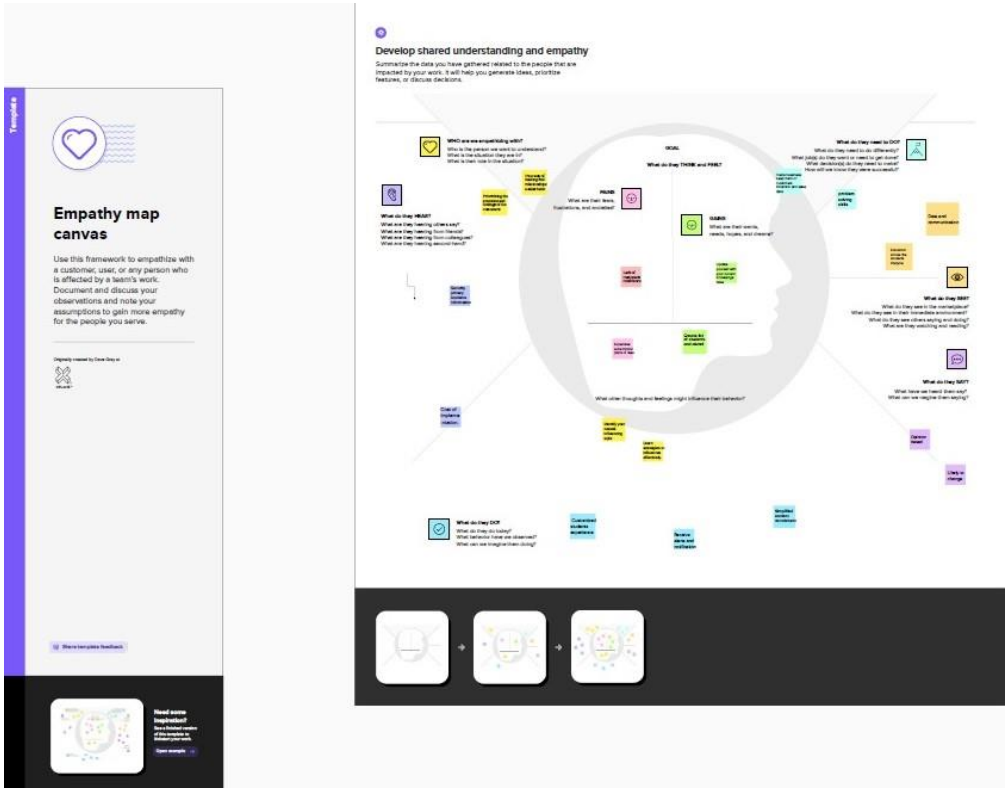
A CRM (Customer relationship management) applications for schools /colleges are software systems designed to help educational institutions and manage relationships with their students,patrnts,alumni,and other stakeholders. These applications allow schools to collect and analyze data adout these groups to improve engagement and communication.

1.2 PURPOSE :

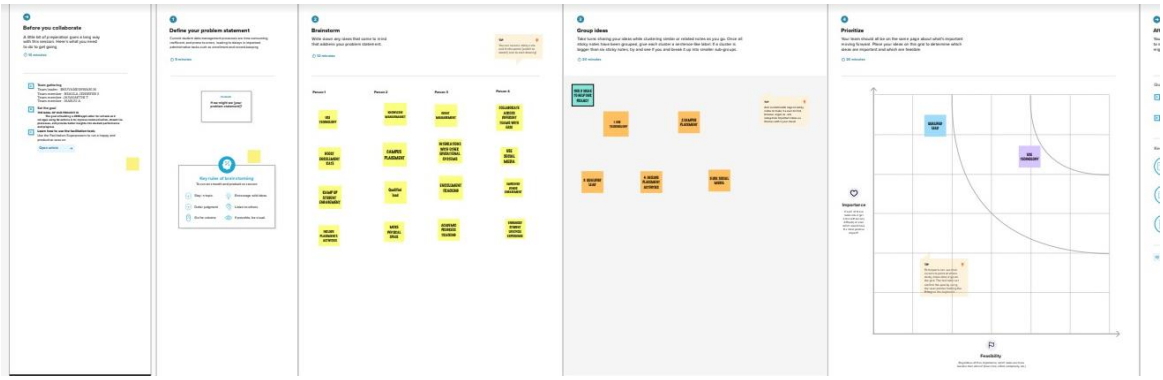
Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

2. PROBLEM DEFINITION &DESIGN THINKING

2.1 EMPATHY MAP :



2.2 IDEATION & BRAINSTORMING MAP :



3 . RESULT

3.1 DATA MODEL :

Object name	Fields in the Object
School	

Fieldlabel	Data type
Address	Text Area
District	Text Area
State	Text Area
School Website	Text Area
Phone Number	Phone
Number of Students	Roll – up summary
Highest Marks	Roll – up summary

Object name	Fields in the Object
Student	

Fieldlabel	Data type
Phone Number	Phone
School	Master – Detail Relationship
Results	Pick List
Class	Number
Marks	Number

Parent	

Fieldlabel	Data type
Parent Address	Text Area
Parent Number	Phone

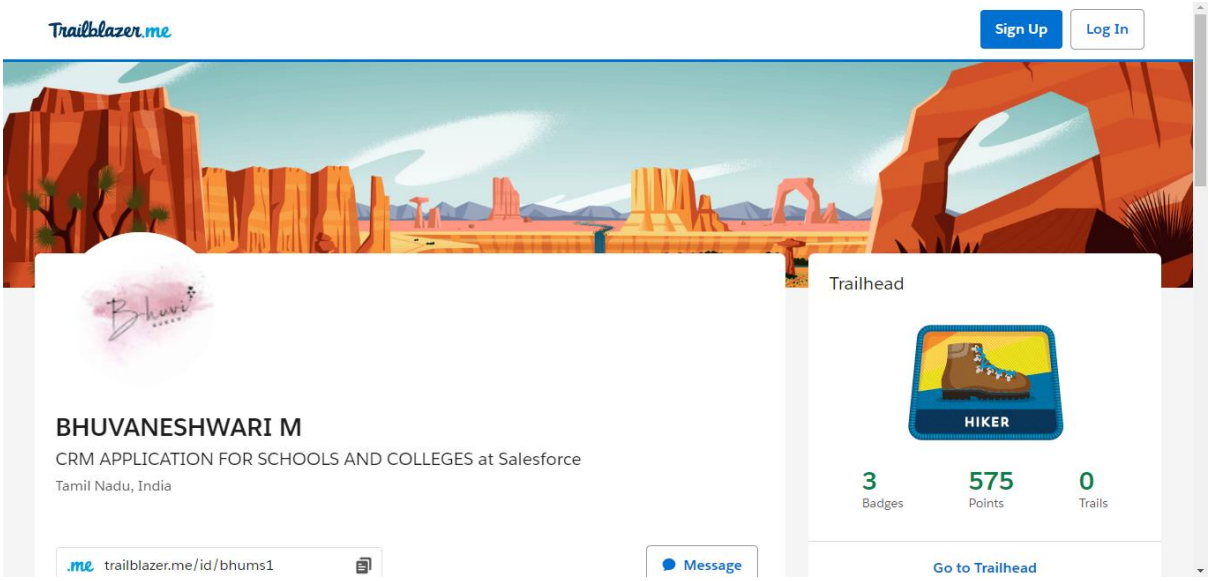
3.2 ACITIVITY & SCREENSHOT :

DESCRIPTION :

The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

MILESTONE-1 :

ACTIVITY : CREATING DEVELOPER ACCOUNT

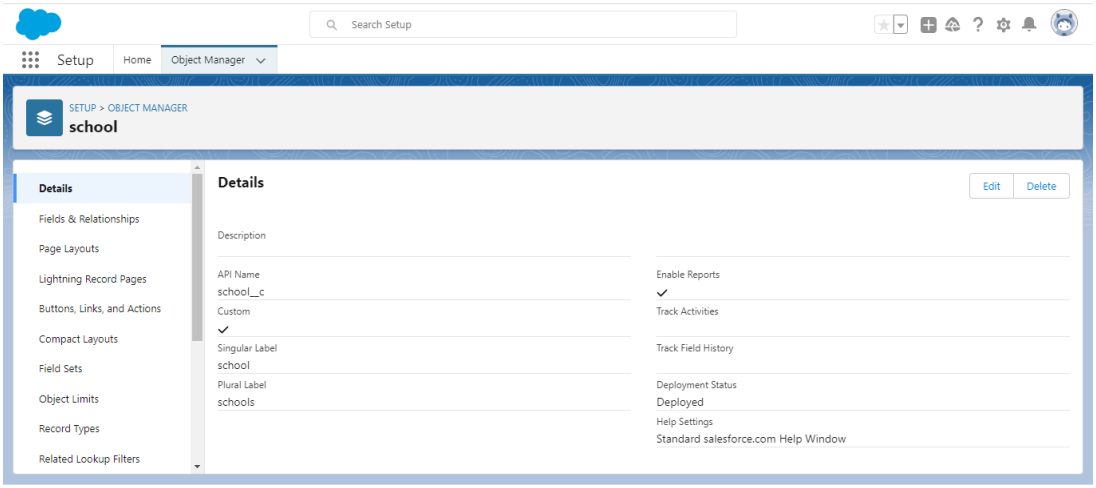


DESCRIPTION :

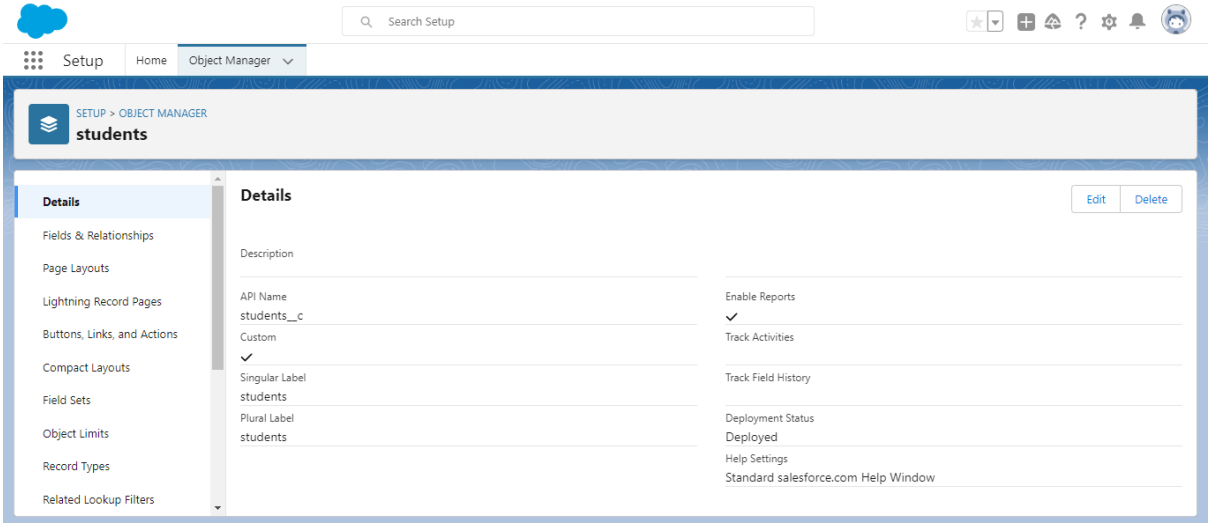
publishing account issued to Developers that enables the distribution of Products via the Market.

MILESTONE-2 : OBJECT

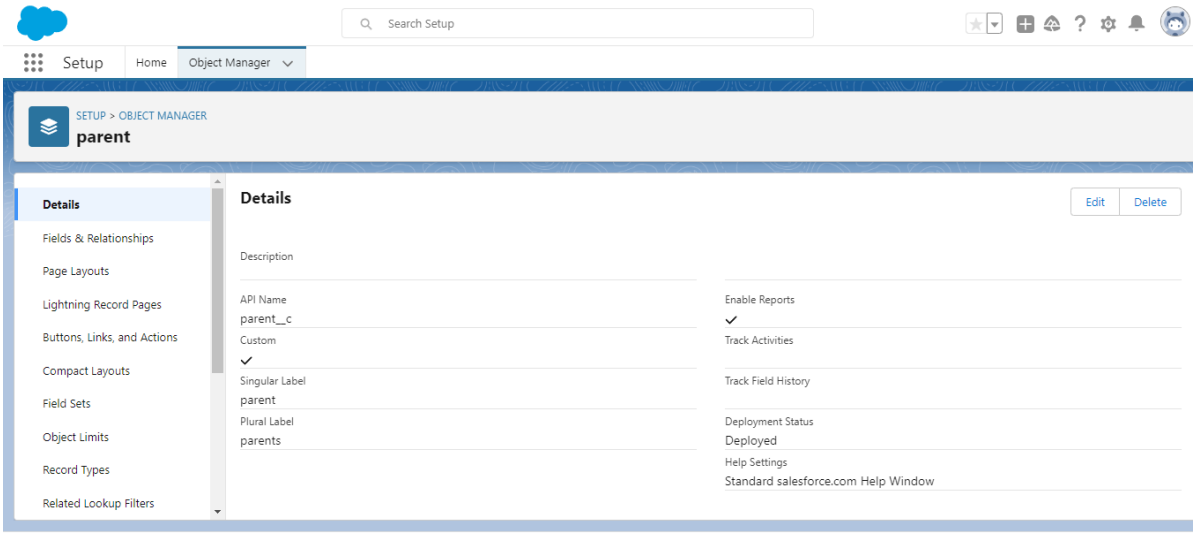
ACTIVITY-1 : CREATION OF SCHOOL OBJECT



ACTIVITY 2 :CREATE STUDENT OBJECT



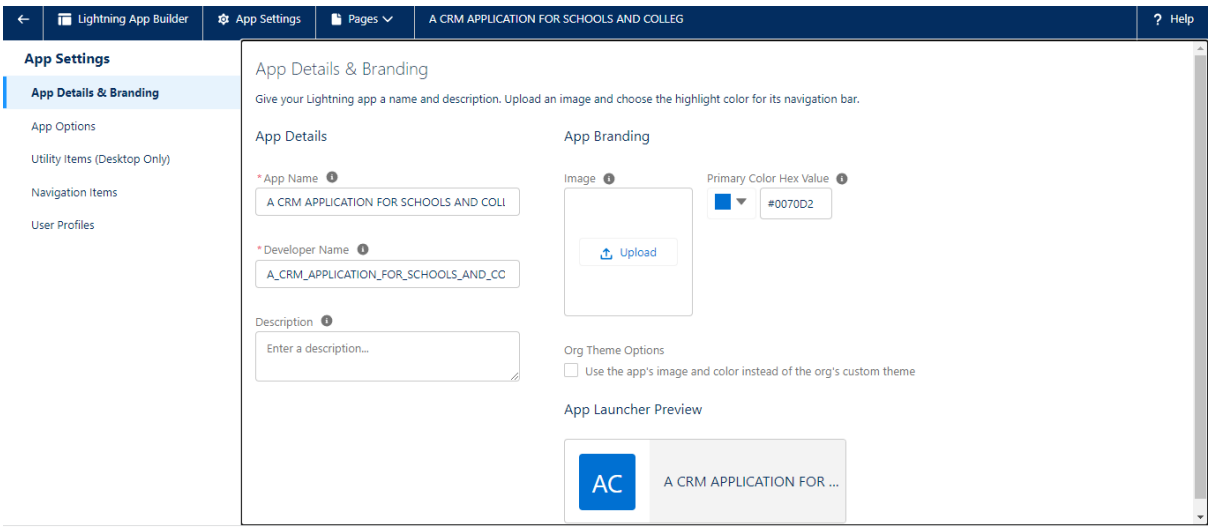
ACTIVITY 3 : CREATE PARENT OBJECT



MILESTONE-3 : LIGHTNING APP

ACTIVITY :

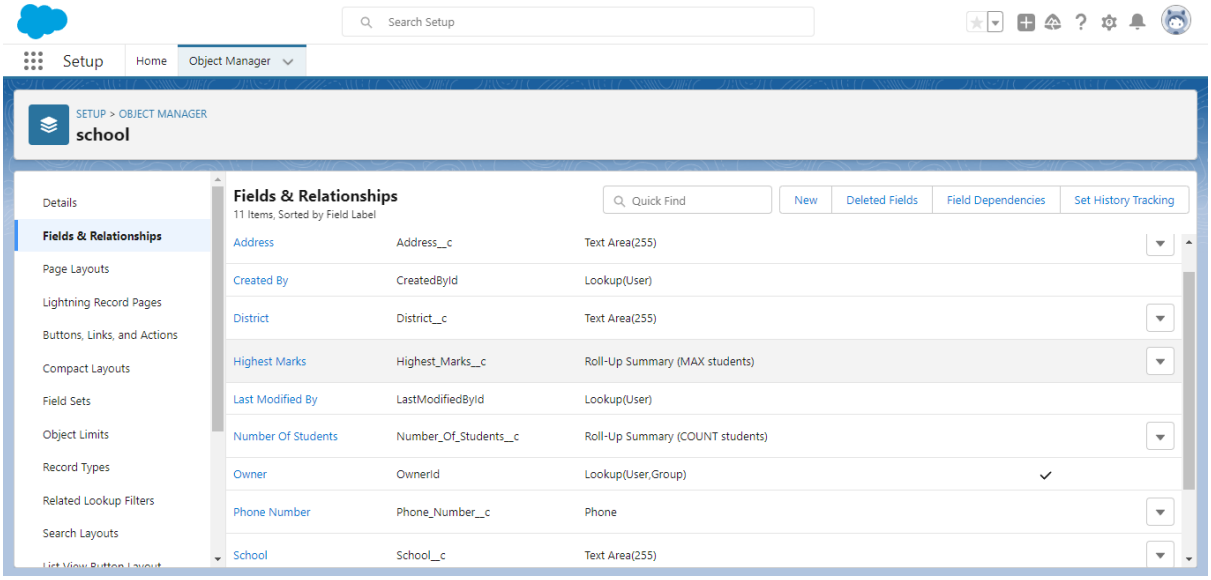
CREATE THE SCHOOL MANAGEMENT APP



MILESTONE – 4 : FIELDS AND RELATIONSHIP

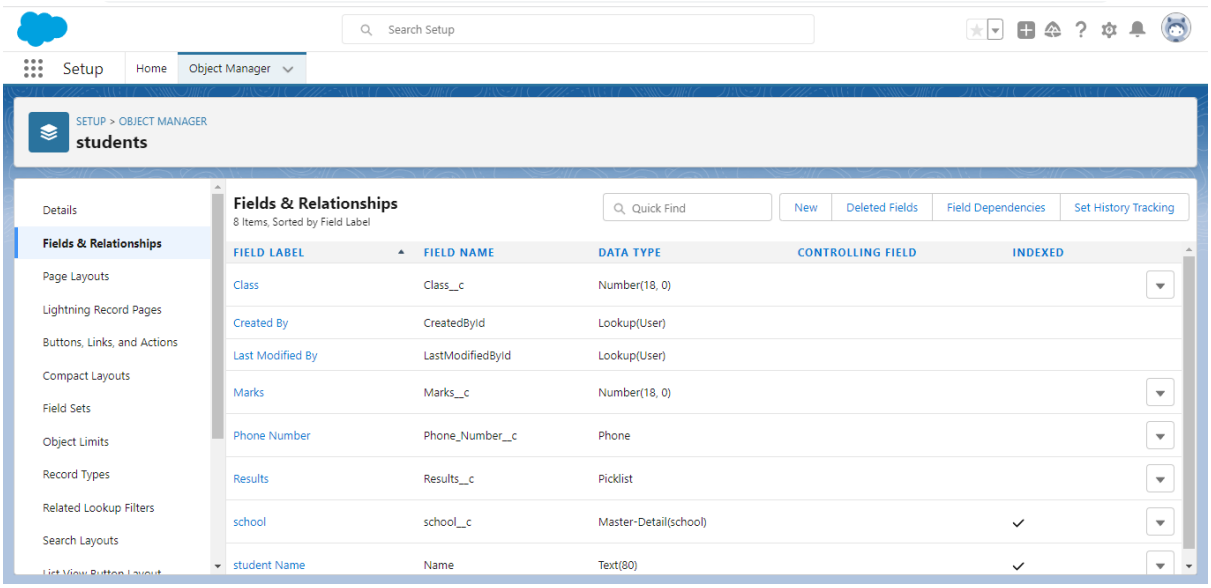
ACTIVITY-1 :

CREATION OF FIELDS FOR THE SCHOOL OBJECTS :



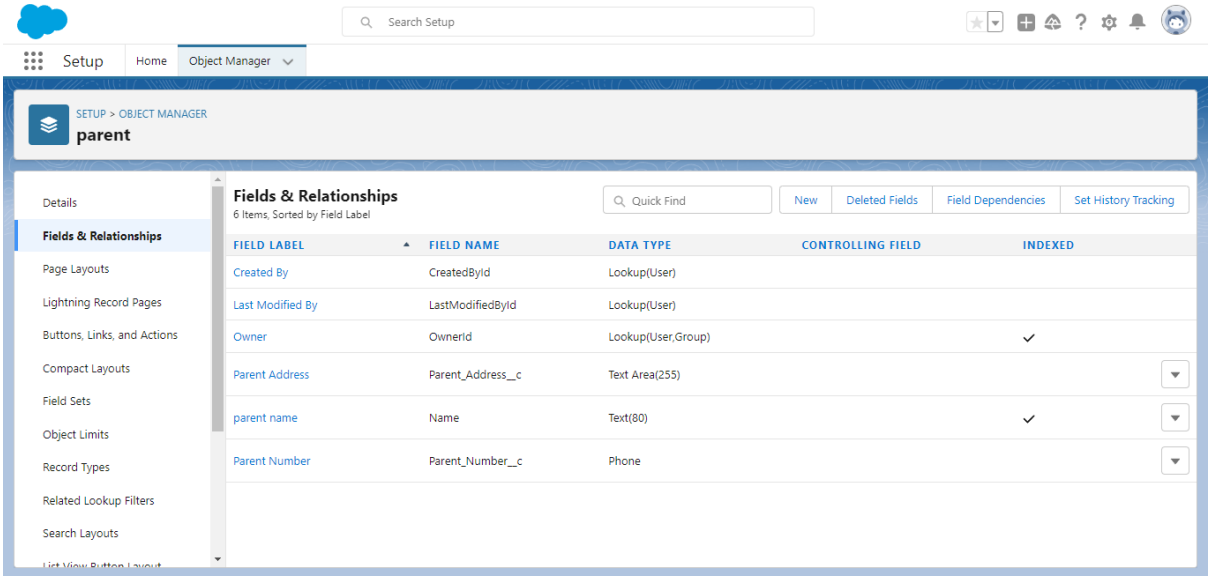
ACTIVITY -2 :

CREATIN OF FIELDS FOR THE STUDENT OBJECTS :



ACTIVITY – 3 :

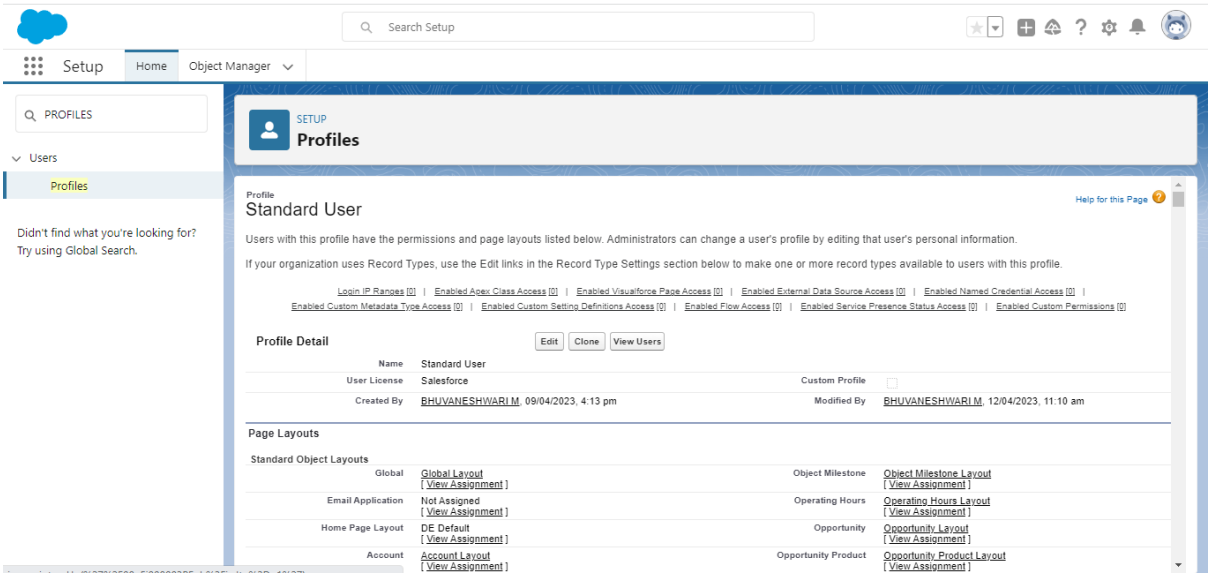
CREATION OF FIELDS FOR THE PARENT OBJECTS :



MILESTONE – 5 : PROFILE

ACTIVITY :

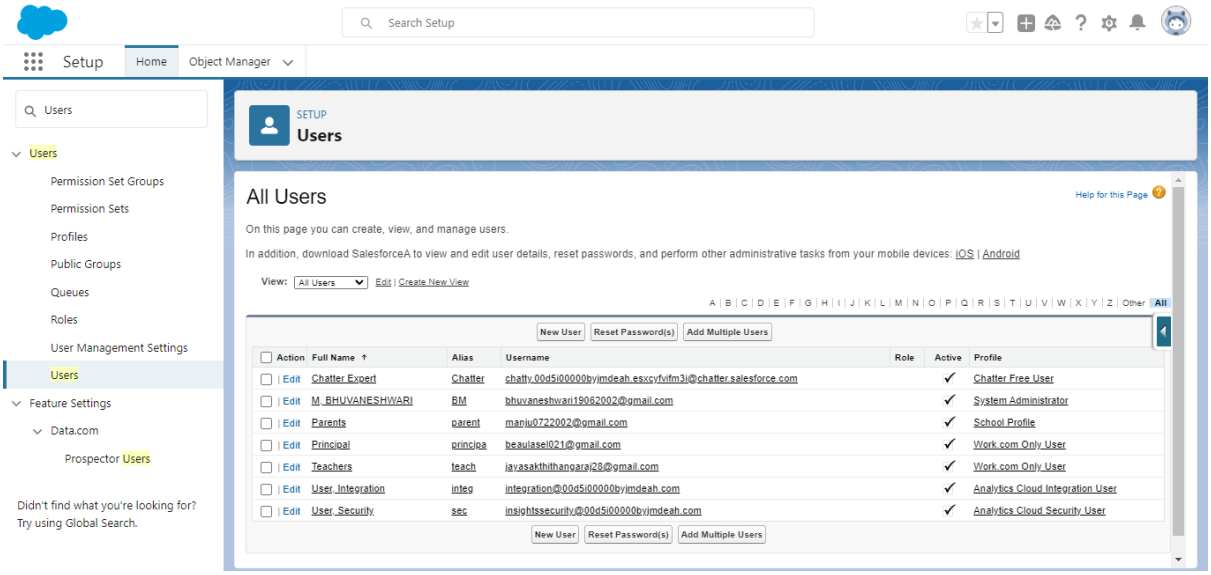
CREATION ON PROFILE :



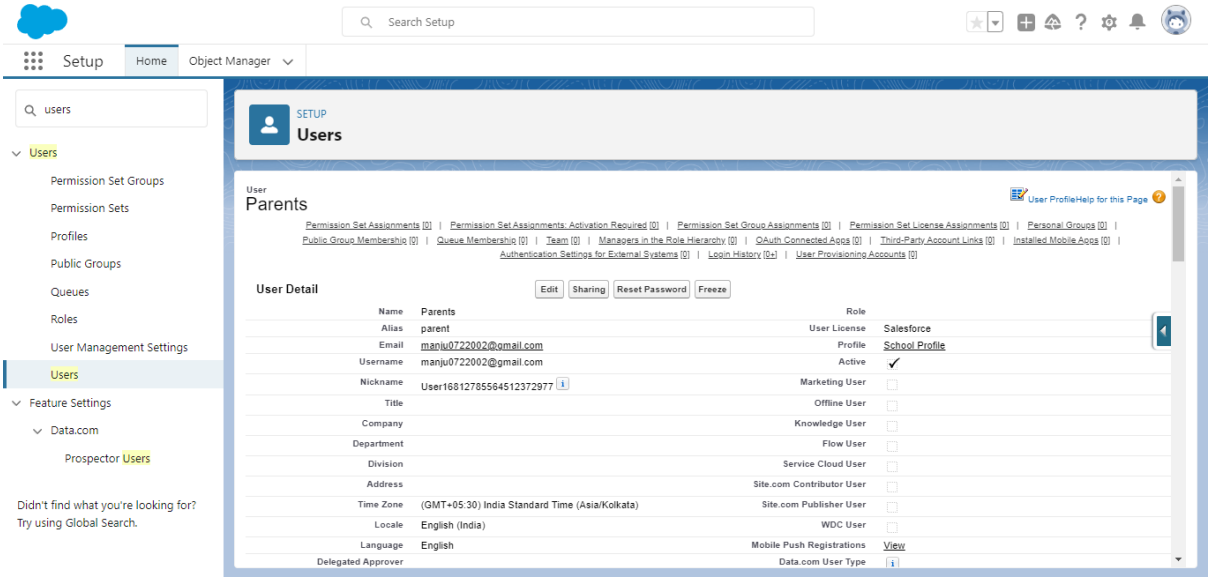
MILESTONE – 6 : USERS

ACTIVITY :

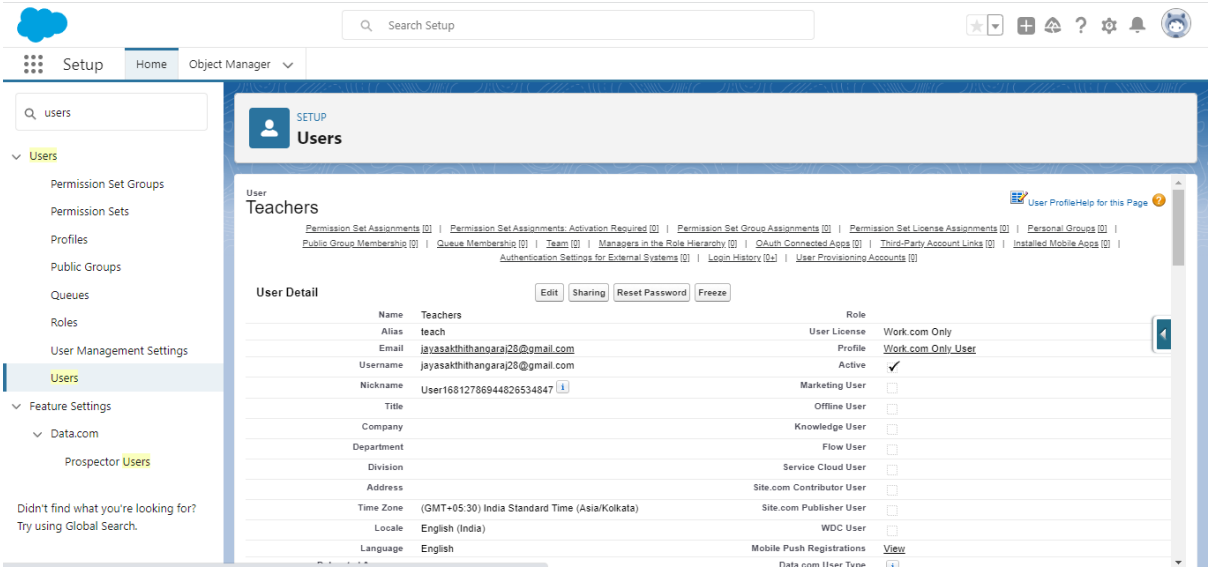
CREATING A USERS :



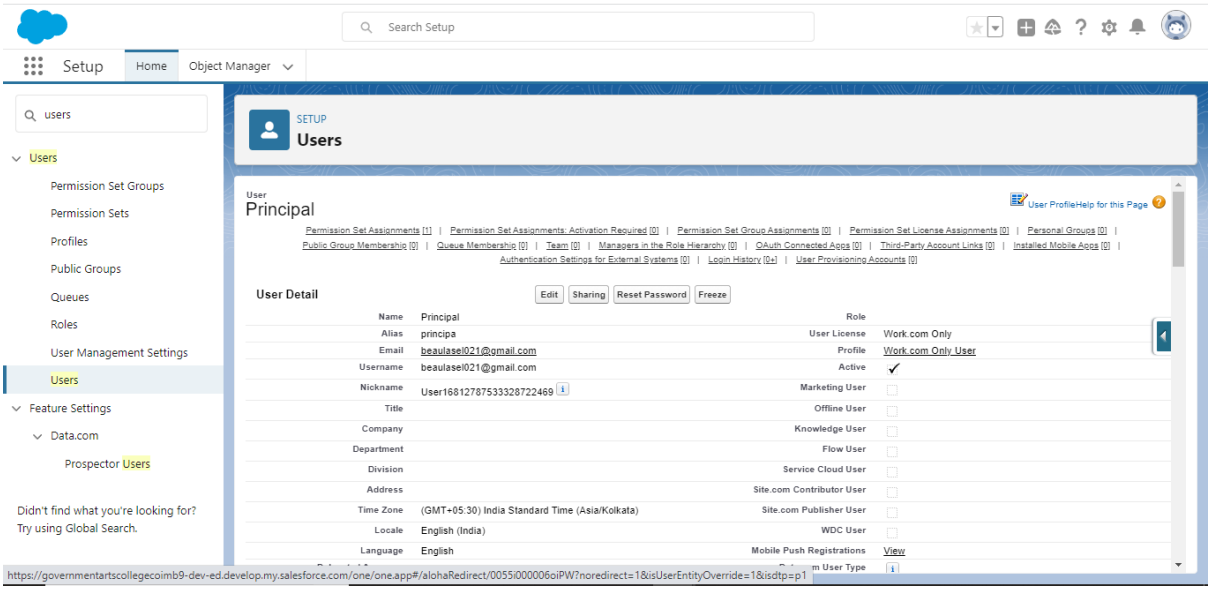
PARENTS :



TEACHERS :



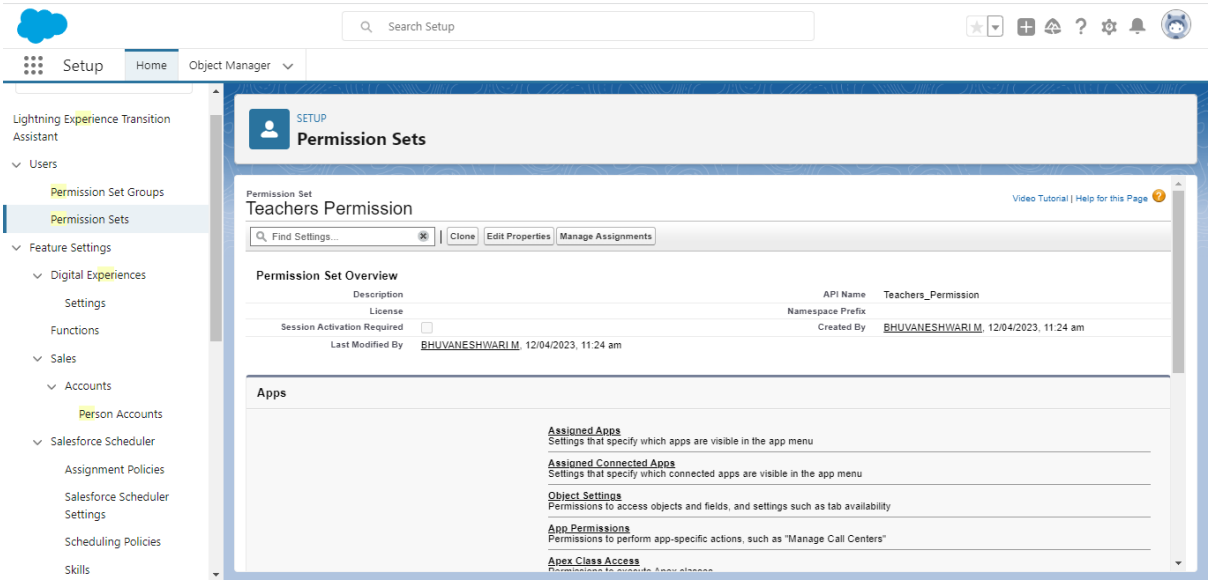
PRINCIPAL :



MILESTONE – 7 : PREMISSION SETS

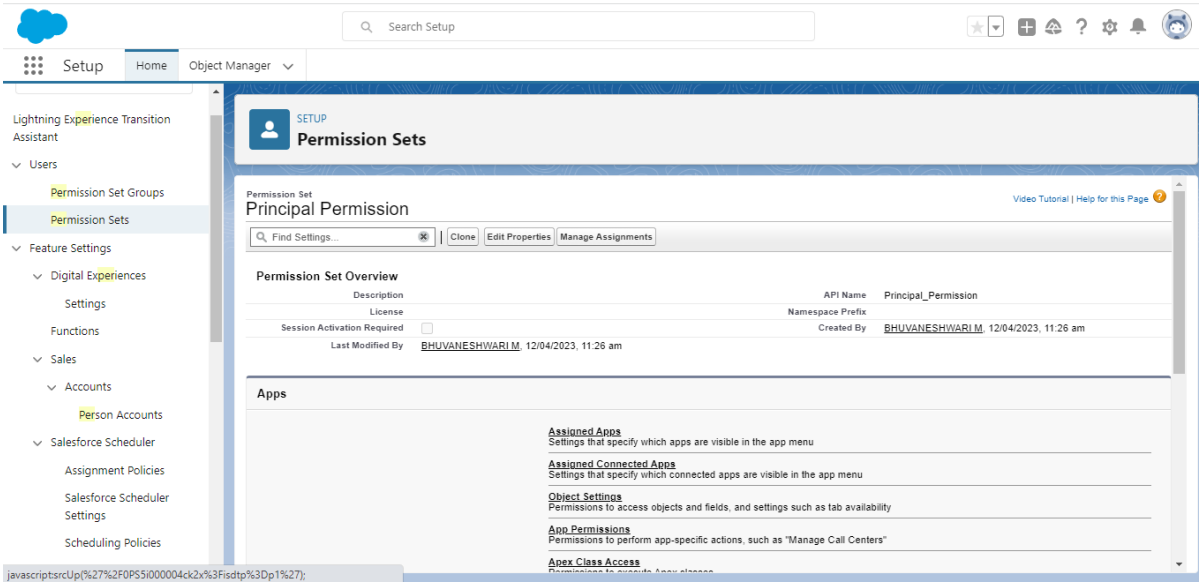
ATIVITY 1 :

PERMISSION SETS -1 : TEACHERS PERMISSION

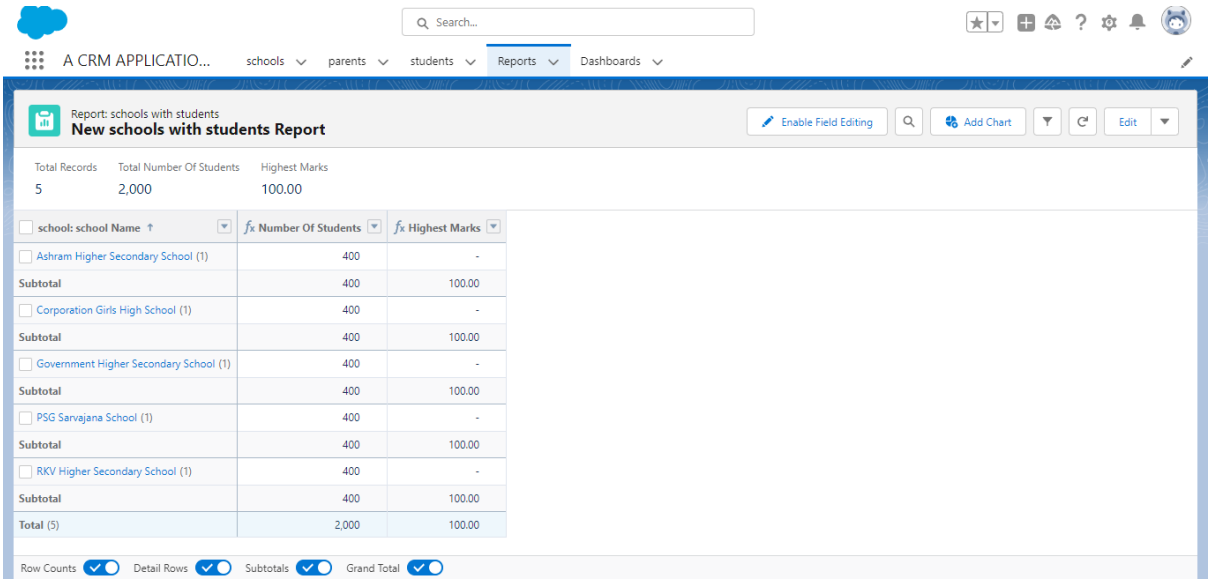


ACTIVITY – 2 :

PERMISSION SETS -2 : PRINCIPAL PERMISSION



MILESTONE – 8 REPORTS



4. TRAILEAD PROFILE PUBLIC URL

TEAM LEAD - https://trailblazer.me/id/bhums1

TEAM MEMBER 1 - trailblazer.me/id/2jennifers

TEAM MEMBER 2 - trailblazer.me/id/2jayasakthi

TEAM MEMBER 3 - trailblazer.me/id/20bpa

5. ADVANTAGES & DISADVANTAGES :

ADVANTAGES :

- Improve Student Admissions Lifecycle.
- Track Student Life-Cycles Within the Institution.
- Keep Alumni Information Safe and Accessible.
- Stay Connected with Teams.
- Monitor Fee Payments and Reminders.
- Reduction in the cost of expenses.
- Improving the quality of sevice.
- Improving the organization management process.
- History of work with each student .
- Relevant and visual MIS analytics reports.
- Planning and multitasking.

DISADVANTAGES :

- Limited access to data
- Lesser means to assess and improve customer satisfaction
- Miss opportunities to upsell and cross-sell
- Inefficiently attract and retain customers
- Juggling between multiple tools
- Spending several man-hours on manual data entry
- Accessing Contacts or Deals on the go

6. APPLICATIONS :

- Student Recruitment
- Admissions Management
- Student Engagement
- Fundraising
- Alumni Relations
- Faculty/Staff Management

7 . CONCLUSION :

CRM applications for schools and colleges are designed to help institutions manage their relationships with students, parents, and other stakeholders. These applications typically include features for managing student information, tracking enrollment and admissions, managing financial aid and scholarships, and communicating with students and parents. They may also include tools for tracking student performance, managing schedules and calendars, and providing analytics and reporting on student and institutional data. Some of the key benefits of CRM applications for schools and colleges include increased efficiency, improved communication, and better student outcomes

8. future scope :

Customer Relationship Management (CRM) applications for schools and colleges have a promising future. With the increasing demand for personalized education, CRM applications can help educational institutions to manage relationships with their students, faculty, and other stakeholders effectively. These applications can assist in tracking student progress, managing communication with parents and alumni, and automating administrative tasks such as scheduling and record-keeping. Moreover, with the integration of artificial intelligence and machine learning, CRM applications can provide valuable insights

to improve student engagement and learning outcomes. As educational institutions continue to prioritize student success, CRM applications will play an essential role in enhancing the overall educational experience.

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TEAM MEMBER 3	:	MANJU.A