

# PROJECT REPORT TEMPLATES

## A CRM APPLICATION FOR SCHOOL/COLLEGES

### 1. INTRODUCTION

#### 1.1. OVERVIEW

A CRM is a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place.

You can collect data either manually, such as by logging a phone call with a lead, or automatically, by integrating an online form on your school website. Having all of this customer data in one place gives you a holistic view of the customer journey — from awareness to enrolment. Many CRMs also offer you the ability to filter leads based on particular attributes, which is especially helpful when needing to view specific groups of leads.

#### 1.2. PURPOSE

Benefits of CRM for Education Industry

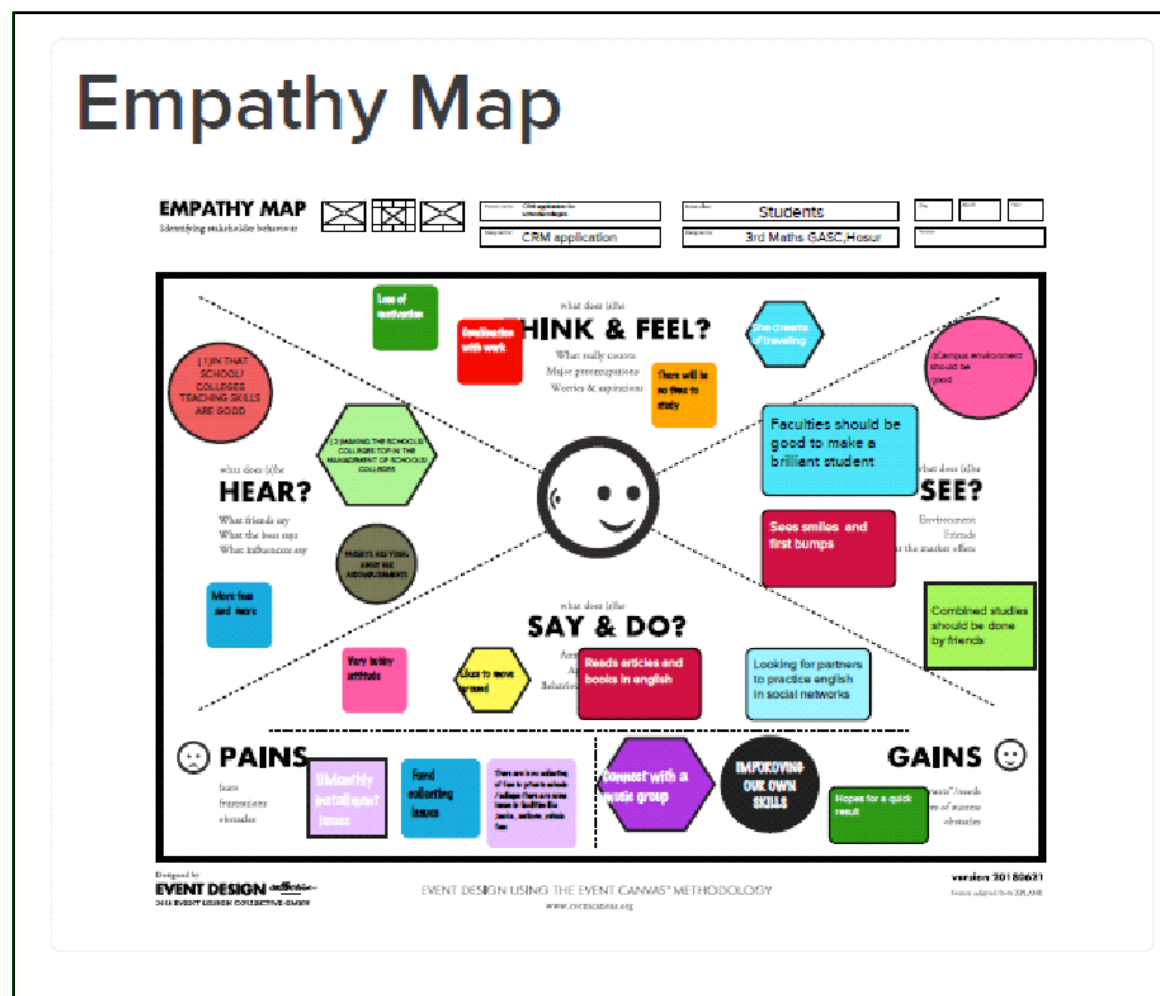
With the increase in complexities, educational institutes have also changed their approach to operate. These organizations embraced CRM for educational institutions to enhance student



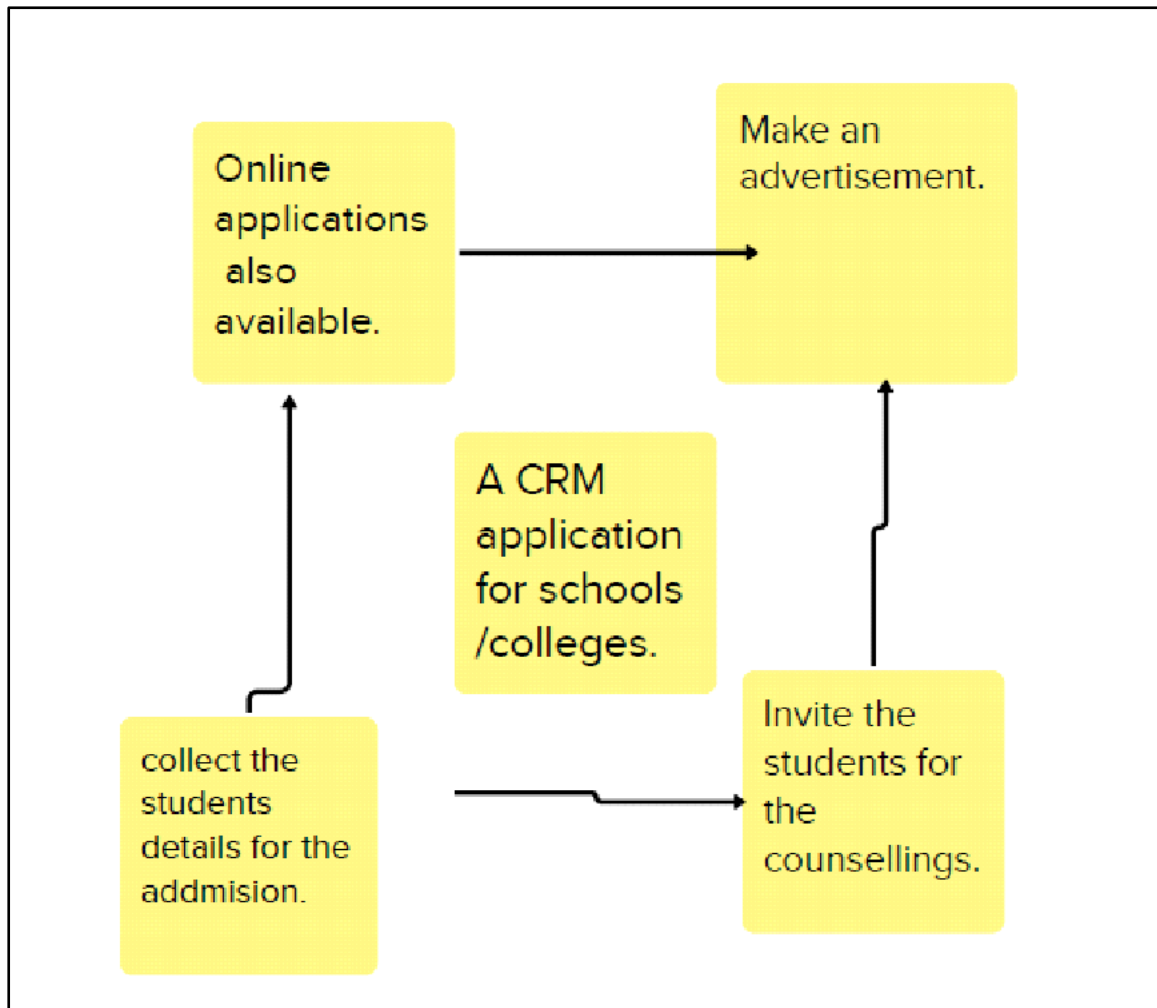
experiences, streamline operations, track and maintain information to develop a deeper understanding of their processes, and extend their outreach.

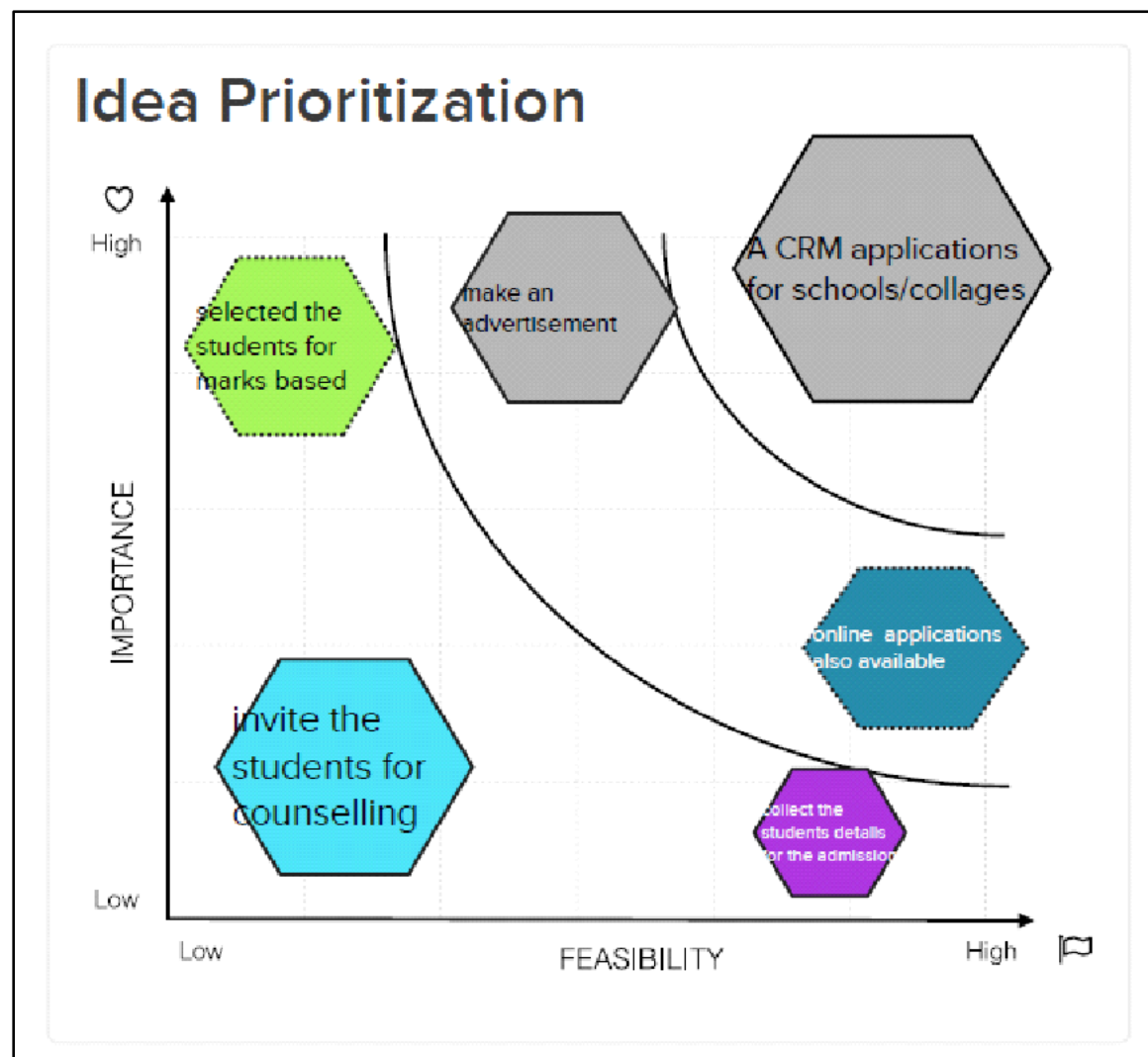
## 2.PROBLEM DEFINITION AND DESIGN THINKING

## 2.1



## 2.2 IDEATION





## 3. RESULT

### 3.1 DATA MODEL

Object Name	Field in the Object
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School	Field Label	Data Type
	Address	Text Area
	District	Text Area
	State	Text Area
	School	Text
	Pincode	Text Area
	Phone Number	Phone
	Number of students	Roll-Up Summary (COUNT Student)
	Highest Marks	Roll-up-summary
student	Field Label	Data Type
	phone number	Phone
	school	Master-Details
	Results	Picklist
	Class	number
	Address	Text Area




	Blood Group	Picklist
	Caste	Picklist
	Date of birth	Date
	Email Address	Email
	EMIS Number	Text Area
	Father Name	Text Area
	Marks	Number
	Mother Name	Text Area
	Religion	Text Area
	Results	Picklist
	Student Name	Text
	Account Number	Text
	IIFSC Code	Text
	MICR code	Text
parent	Field Label	Data Type
	Father Name	Text
	Mother Name	Text
	Father occupation	Text



	Mother occupation	Text
	Parent Number	Phone
	Father Graduate	Picklist
	Mother Graduate	Picklist
	Annual Income	Currency
	Permanent Address	Text Area
	Temporary Address	Text Area

## 2.2 ACTIVITY



 **SETUP**  
**Tabs**

## Custom Tabs




Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Parents	 People	
<a href="#">Edit</a>   <a href="#">Del</a>	schools	 Heart	
<a href="#">Edit</a>   <a href="#">Del</a>	Students	 Shopping Cart	

Web Tabs

New What Is This?

No Web Tabs have been defined


Search...

New school

Information

\*school Name

Owner

 Charan Kumar

address

District

State

school

Cancel

Save & New

Save






Search...

New Parent

Information

\* Father Name

Owner

 Charan Kumar

Permanent Address

Parent Number

Mother Name

Father Occupation

Mother Occupation

Cancel

Save & New

Save

School Management

Schools

Students

Parents

Reports

Dashboards

Reports

Recent

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Parents Report		Private Reports	Charan Kumar	6/4/2023, 11:56 am	
Created by Me	New schools with Students Report		Private Reports	Charan Kumar	6/4/2023, 11:56 am	
Private Reports	New Accounts Report		Private Reports	Charan Kumar	27/2/2023, 4:30 pm	
Public Reports						
All Reports						
FOLDERS						
All folders						
Created by Me						
Shared with Me						
FAVORITES						

## 4. TRAILHEAD PROFILE PUBLIC URL

Team lead: <https://trailblazer.me/id/charan1522>

Team member 1: <https://trailblazer.me/id/abisg>

Team member 2: <https://trailblazer.me/id/devas94>

Team member 3: <https://trailblazer.me/id/anuj67>

Team member 4: <https://trailblazer.me/id/bhavs50>

## 5. ADVANTAGES & DISADVANTAGES

### ADVANTAGES

#### 1. Reduction In The Cost Of Expenses.

One of the main benefits of using CRM in education is that automation and standardized online learning processes reduce costs by eliminating a lot of routine and manual steps. But if during the implementation of CRM the number of routine operations in the company's business processes does not decrease, then the implementation plan requires revision.

#### 2. Improving The Quality Of Service / Product.

With a CRM approach, the company prioritizes customer relationships, which allows for more feedback. And thanks to this feedback, you can seriously increase the quality of your services or your product.

### DISADVANTAGES

Customer Relationship Management (CRM) applications can offer a number of benefits to schools and colleges, there are also some potential disadvantages to consider:

Cost: CRM applications can be expensive to



purchase and maintain, which may not be feasible for smaller schools or colleges with limited budgets.

**Complexity:** Implementing a CRM system can be complex, requiring significant time and resources for setup and training. It may also require significant customization to fit the unique needs of the institution.

**Data privacy:** Schools and colleges must comply with strict data privacy laws, such as the Family Educational Rights and Privacy Act (FERPA), when handling student data. A CRM system must be configured to ensure compliance with these regulations.

**User adoption:** Getting faculty and staff to adopt a new system can be challenging, especially if they are already used to using other tools to manage student data.

**Maintenance:** CRM applications require ongoing maintenance and updates to ensure they remain functional and secure. This requires additional time and resources for the institution.

**Integration:** A CRM system may not integrate easily with existing systems or software, which can lead



to additional challenges and expenses.

Overall, while CRM applications can offer many benefits, it is important to carefully weigh the potential disadvantages before implementing such a system in a school or college setting.

## 6. APPLICATIONS

A CRM system can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over time

## 7. CONCLUSION

College Life vs. High school Life As you graduate high school and begin your first year of college you realize that things are a lot different. In high school your classes are mainly based off of what credits you need to graduate, but in college you choose what classes you want to take and when you would like to take them. College is also a bigger expense than high school. You have to pay for all your books, tuition, and even room and board. Lastly, college life comes with more responsibility

## 8. FUTURE SCOPE

Over the years, several types of research have been conducted to determine how Indians feel about their education system and to solicit suggestions



on how it can be improved. As it turns out, most Indian citizens are rather satisfied with the type of education that is provided in our country.

On the global front, Indias education industry holds a pivotal place. After all, India has one of the largest networks of higher education institutions in the world

