PROJECT REPORT
A CRM APPLICATION FOR SCHOOLS AND COLLEGES

1.INTRODUCTION

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. 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.

The CRM should be supported by an engaged team, focused on providing support, information, and encouragement to prospective families.

2. _Purpose:_

Higher education CRM systems normally serve three key audiences: prospective students, current students, and alumni/donors.

CRM systems are software **applications** used to automate and current students, employees, alumni donors_ everyone in your institutions community.

Overall using a CRM system has been definitely a great improvement for our recruitment and admissions processes and a great help to our team.
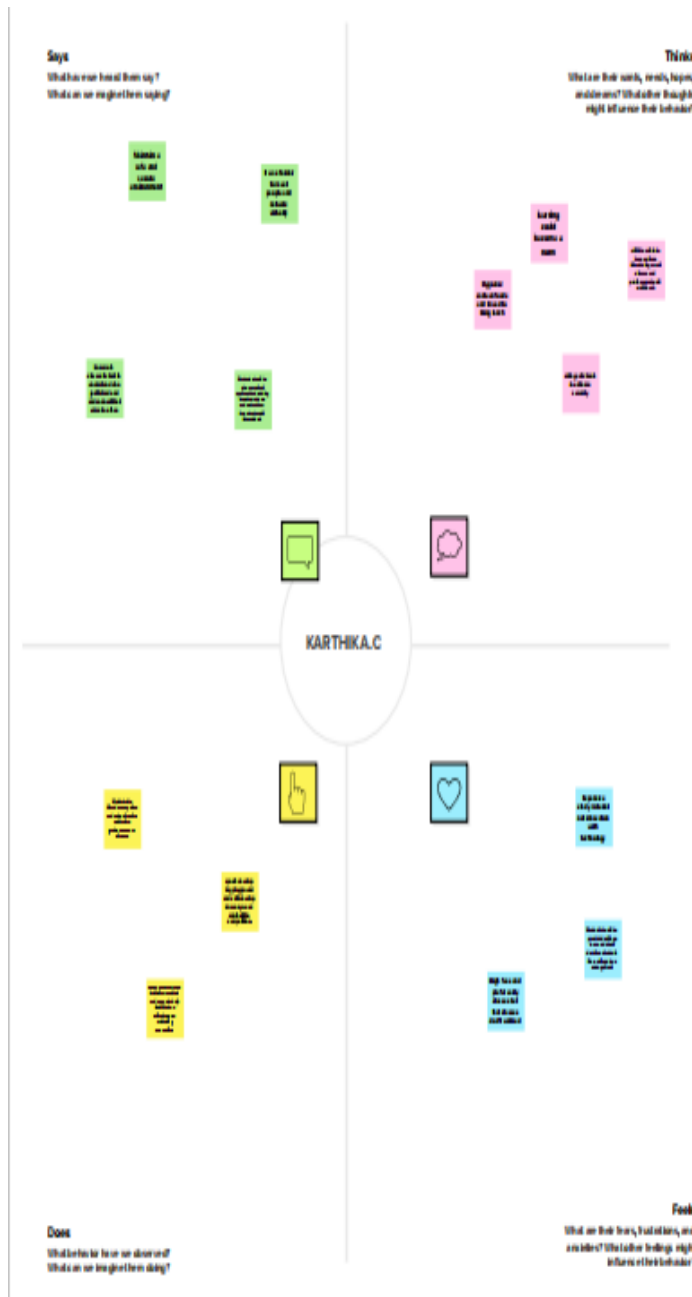
2.PROBLEM DEFINITION & DESIGN THINKING

1.EMPATHY MAP:

🎖SAYS

🎖DOES

🎖THINK

🎖FEELS

Says

What have we heard them say?
What can we imagine them saying?

Thinks

What are their needs, wants, hopes, and dreams? What other thoughts might influence their behavior?

KARTHIKA.C

Does

What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

2.IDEATION AND BRAINSTORMING MAP

🎇 _PROBELM_

🎇 _BRAINSTORM_

🎇 _PRIORITIZE_

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕐 5 minutes

PROBLEM
MAINTENENCE ?
IIMPLIMENT

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.

🕐 20 minutes

1.KARTHIKA.C
2.SARALA.R
3.BOOMIKA.R
4.SNEGA.R

TIP
Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize importantideas as themes within your mural.

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕐 20 minutes

Importance

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

All students every day share by bus travel location and share by parents.

College or school near in student college bus fee no fees of CRM tracking system.

CRM can also help student utilize student cares card maintain paramedical help of aid as in belief visitors of upcoming deadline promote beside your information solutions.

every month only three or five days all girls provide any types of grains food.

A CRM for university admission all speed up application processes. is not take a seat.

health center and emergency room in institute

All students provide for separate place present library in our institute.

every day all students parents develop one in developers unique for colors university experiment problems

professor and teachers child (Due to do age) stay and secure room and provide the milk

A CRM system track and data collection new student completion rates.

CRM to all information updates of all students parents.

Improving prospecting future students so student recruitment can be tricky.

smart classes and all subject maximum use for classes technical excession

Not innovation with technology and expensive study material.

All person separate place in library.

all student stay the bike on separate place in institute.

TIP
Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the H key on the keyboard.

Brainstorm

Write down any ideas that come to mind
that address your problem statement.

⏱ 10 minutes

BOOMIKAR

KARTHIKA.C

SNEGAR

SARALAR
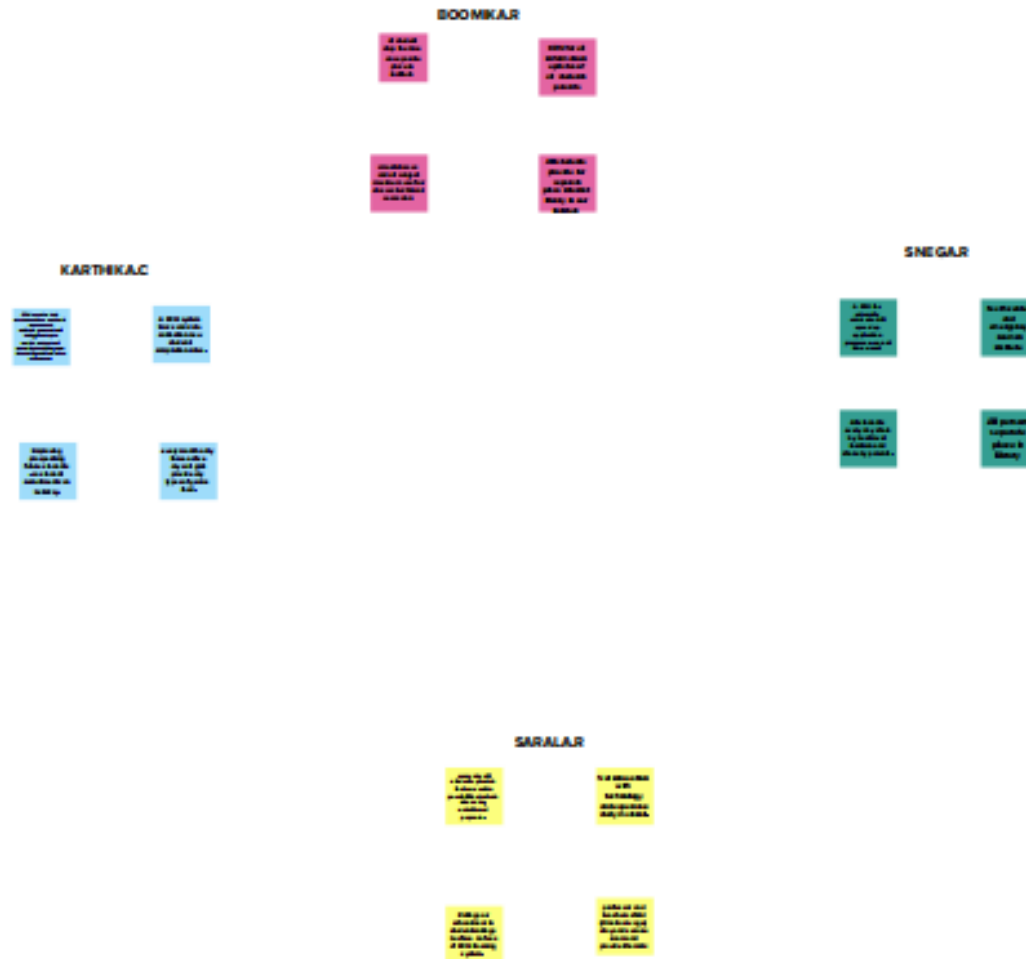
3.RESULTS:

1.DATA MODEL:

❇️ SCHOOLS

❇️ STUDENTS

❇️ PARENTS

OBJECT NAME	FIELDS IN THE OBJECT		
		FIELD LABEL	DATA TYPE
SCHOOL	1	Text Area	address
	2	Text Area	district
	3	Text area	state
	4	Text area	School websites
	5	phone	Phone number
	6	Roll up summary	Number of students
STUDENT	Phone		Phone number
	picklist		results
	number		class
	number		mark
	Master relationship		school
PARENT	Text area		Parent address
	phone		Phone number

2.ACTIVITY &SCREEN SHOT

⭐ First we need to create new custom object that related to our topic and type the other details too.

1.school

2.student

3.parent

FIELDS AND RELATIONSHIP

1.SCHOOL

2.PARENT

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 Name	Name	Text(80)		✓	▼
Parent Address	Parent_Address__c	Text Area(255)			▼
Parent Number	Parent_Number__c	Phone			▼

3.STUDENT

SETUP > OBJECT MANAGER
Student

	Fields & Relationships
Details	8 Items, Sorted by Field Label
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

Label	Name	Data Type	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)	✓	▼

PROFILES

SETUP
Profiles

Profiles

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

	Action	Profile Name ↑	User License	Custom
☐	Edit	Clone	Salesforce API Only System Integrations	Salesforce Integration	☐
☐	Edit	Del |...	School Profile	Salesforce	✓
☐	Edit	Clone	Silver Partner User	Silver Partner	☐
☐	Edit	Clone	Solution Manager	Salesforce	☐
☐	Edit	Clone	Standard Platform User	Salesforce Platform	☐
☐	Edit	Clone	Standard User	Salesforce	☐
☐	Edit	Clone	System Administrator	Salesforce	☐

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USERS

PERMISSION SET

1.TEACHER PERMISSION SET

PRINCIPAL PERMISSION SET

REPORTS

1.PARENT REPORT

2.SCHOOL WITH STUDENT

4.TRAILHEAD PROFILE PUBLIC URL

Team lead: *https://trailblazer.me/id/karthika212002*

Team member 1: *https://trailblazer.me/id/sarala2002*

Team member 2: *https://trailblazer.me/id/boomika2003*

Team member 3: *https://trailblazer.me/id/snega282003*

PROJECT REPORT TEMPLATE

ADVANTAGES:

📖 *School CRM software automates many of the manual processes involved in student and parent communication, data management, and reporting.*

📖 *Student information management.*

📖 *Enrollment tracking, academic progress tracking.*

📖 *Understand which stage of the admission journey a family is in.*

The best CRM software for educational institutes is lead squared. It provides tools for enrollment management, marketing automation (automated communication email....) and a parent portal on a single platform.

It can speed up the sales conversion process. It allows for more effective sales and marketing.

Disadvantages:

It may not suit every business.

It requires a process sales organization. The excess initial time and productivity   cost of implementation.

security concerns associated with centralized data.

Staff over reliance on CRM may diminish customer loyalty through a bad experience.

APPLICATION:

Businesses of all sizes, from solo. Freelancers enter prize level corporations, can use CRM technology effectively.

Dynamic application.

Application payment.

Candidate dashboard.

Student quarry management system.

Lead nurturing.

CRM are organization, centralized task management, marketing automation and communication, which are important to every business's success.

conclusion

Customer relationship management (CRM) can play a remarkable role in optimizing relation-based operations in organizations successful implementation of CRM involves satisfying customer needs which consequently results in

building, managing and retaining effective and long-term relationship with customer.

However, by smart use of a proper student-oriented marketing strategy with the support of a CRM system they still will be able to keep reasonable market store of international students.

FUTURE SCOPE:

🏆 The CRM software gathers all customer-related information into a single place. Moreover, you can easily track customers across all platforms via the CRM system. Therefore, if you find any changes in their details or activities, then instantly update the same on your software. You can thereby minimize errors and save your time as well as effort for running your business.

🏆

- Customer service and contact management
- Knowledge sharing and document management
- Computer Telephony Integration (CTI)
- SLA and contract management
- Social listening integration

BY.....

KARTHIKA.C,

A CRM APPLICATION FOR SCHOOLS AND COLLEGES,

B.SC MATHEMATICS-THIRD YEAR,

RAJAH SERFOJI GOVT COLLEGES,   THANJAVUR-613 005.