

## **CRM OPERATION SCHOOL AND COLLEGE**

### **1.INTRODUCTION:**

#### **1.1 OVERVIEW:**

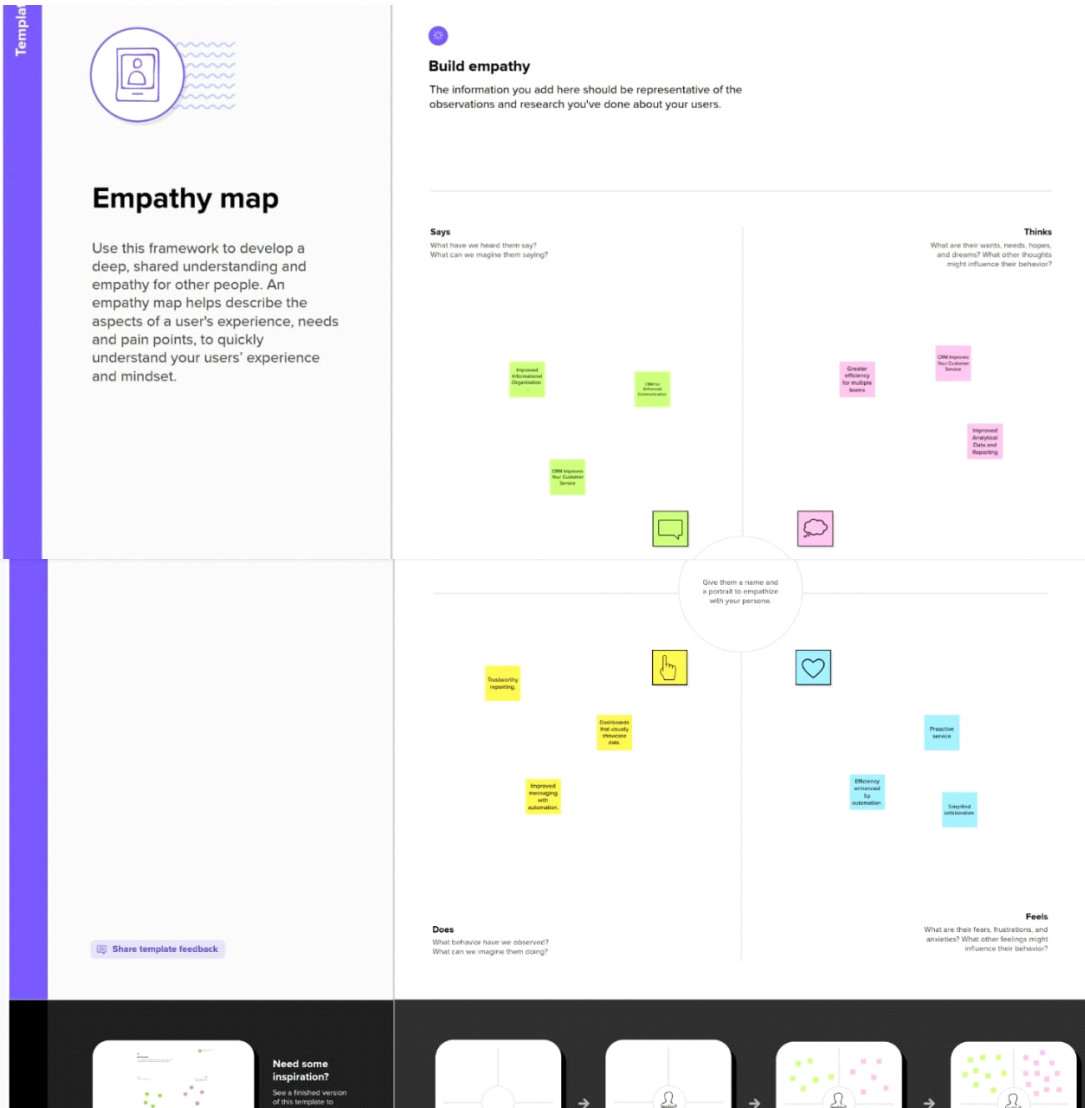
**Purpose** The purpose of this paper is to explore customer relationship management (CRM) in a higher education setting. **Design/methodology/approach** The development and implementation of a CRM project in a state community college was examined as were the benefits realized by implementing CRM. As colleges increasingly embrace distance learning and e-business, CRM will become stronger and more pervasive. Viewing students as customers provides a competitive advantage for higher education and enhances a college's ability to attract, retain and serve its customers

#### **1.2 PURPOSE:**

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

### **2.PROBLEM DEFINITION & DESIGN THINKING:**

#### **2.1 EMPATHY MAP:**



## 2.2 IDEATION & BRAINSTORMING MAP:



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

4

### After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

- 5

#### Share the mural

Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
- 5

#### Export the mural

Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save to your drive.

Keep moving forward

- 5

#### Strategy blueprint

Define the components of a new idea or strategy.

Open the template →
- 5

#### Customer experience journey map

Understand customer needs, motivations, and obstacles for an experience.

Open the template →
- 5

#### Strengths, weaknesses, opportunities & threats

Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.

Open the template →

Share template feedback

5

### 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 can break it up into smaller sub-groups.

20 minutes

## 3. RESULT:

### 3.1 DATA MODEL:

Candidate		
	<b>Field Label</b>	<b>Data Type</b>
	Education	Picklist (Multi-Select)
	First Name	Text(30)
	Last Name	Text(30)
	Zip/Postal Code	Text(50)
Interviewer		
	<b>Field Label</b>	<b>Data Type</b>
	Employee	Lookup(User)
	Position	Lookup(Position)
Position		
	<b>Field Label</b>	<b>Data Type</b>
	Location	Picklist
	Record Type	Record
	Salary Range	Picklist
	Status	Picklist
	Title	Text(80)
Review		
	<b>Field Label</b>	<b>Data Type</b>
	Interviewer	Lookup(Interviewer)
	Job Application	Master-Detail(Job Application)
	Overall Review Score	Formula (Number)

### 3.2 SCREENSHOT:

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SETUP

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API

Object Name  Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

--None--

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SETUP

Object Manager

45 Items, Sorted by Label

Quick Find Schema Builder Create ▾

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Contact Relationship	AccountContactRelation	Standard Object			
Activity	Activity	Standard Object			
Asset	Asset	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Campaign	Campaign	Standard Object			
Campaign Influence	CampaignInfluence	Standard Object			
Campaign Member	CampaignMember	Standard Object			
Case	Case	Standard Object			
Contact	Contact	Standard Object			
Contact Request	ContactRequest	Standard Object			

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Setup Home Object Manager ▾

roles

Users Roles Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Contact Roles on Cases

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### SETUP Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy View other sample Role Hierarchies: Territory-based Sample

```

graph TD
    ES[Executive Staff  
CEO President CFO VP, Sales] --> WSD[Western Sales Director  
Director of W. Sales]
    ES --> ESD[Eastern Sales Director  
Director of E. Sales]
    ES --> ISD[International Sales Director  
Director of Int'l Sales]
    WSD --> WSR[Western Sales Rep  
CA Sales Rep OR Sales Rep]
    ESD --> ESR[Eastern Sales Rep  
NY Sales Rep MA Sales Rep]
    ISD --> ISR[International Sales Rep  
Asian Sales Rep European Sales Rep]
  
```

\* View & edit data, roll up forecasts, & generate reports for all users below  
\* Can't access data of other Executive Staff

\* View & edit data, roll up forecasts, & generate reports for all users directly below  
\* Can't access data of users above or at same level

\* View & edit data, roll up forecasts, & generate reports only for own data  
\* Can't access data of users above or at same level

Set Up Roles

☐ Don't show this page again

governmentartsciencecollegeforwo6.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntity...

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users

Users Permission Set Groups Profiles Public Groups Quizzes Roles User Management Settings

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### SETUP Users

General Information

First Name: Last Name: User Name: Email: Username: Password: Title: Company: Department: Division:

Role: User License: Profile: Admin: Marketing User: Difference User: Sales Incentive User: Plan User: Accessibility: Role (Global Only): High-Complex Roles or Chats: Last Lightning Page With Loading: Select Work: Credit Incentive: Allow Forecasting: Checkbox Control: Call Center: Phone: Extension: Fax: Mobile: Email Grouping: Employee Number:

Working Address: Street: City: Zip/Postal Code: State/Province: Country:

Single Sign-On Information: Federation ID:

Locale Settings: Time Zone: Locale: Language: ☒ Generate new password and notify user immediately

Save Cancel Reset

#### 4.TRAILHEAD PROFILE PUBLIC URL:

Team lead -: <https://trailblazer.me/id/keerb29>

Team member 1 ; <https://trailblazer.me/id/penna20>

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

Team member 3 : <https://trailblazer.me/id/mmathi108>

## **5.ADVANTAGES & DISADVANTAGE:**

### **5.1 ADVANTAGES:**

**Improve Student Admissions Lifecycle**

**Track Student Life-Cycles Within the Institution**

**The student lifecycle begins with the admission and goes all the way to graduation.**

**Keep Alumni Information Safe and Accessible**

**Stay Connected with Teams**

**Monitor Fee Payments and Reminders**

**Track and Gain Insight on Organization-Wide Data and Processes**

**Reduce Operational Costs**

### **5.2 DISADVANTAGE:**

**Loss of collected information or records**

**Not suitable for every business**

**It eliminates the human element**

**Can be accessed by the third party**

**CRM is not fully customized**

**Have poor usability**

## **6.APPLICATION:**

**This means you will see trends and be informed faster as things grow and change. A CRM helps you know when it's time to hire more people, alter internal processes, or invest resources into more**



production, before growing pains and panic sets in. Implementing an operational CRM platform means choosing to break through the ceiling of your sales potential. By accessing valuable insights that help you make better decisions, using customer insights to gain an upper hand on your competition, and developing processes that allow you to provide the same high quality of service even as your customer base grows, consider CRM solutions at the beginning of the next chapter for your business.

#### **7.CONCLUSION:**

A CRM centralises donor and alumni information and is used to send out automated communications at key times of the year to keep everyone updated on the success of the institution's programmes and students.

#### **8.FUTURE SCOPE:**

The future of CRM is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations.