



A CRM APPLICATION FOR SCHOOLS/COLLEGES

Project Based Experiential Learning Program

Project: A CRM Application for Schools and Colleges



Project Report Template

- *Salesforce is our customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.*
- *Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.*
- **What is CRM?**
 - CRM - Customer Relationship Management, it is a technology used for managing all your company's relationships and interactions with the customers and potential customers.
 - Goal: Improve Business relationships, helps companies stay connected to customers, streamline processes and improve profitability.

1 INTRODUCTION

Creation of an Application for school Management

This Project helps you to maintain and manage the school related problems which further can be modified based on the requirements. Create a Smooth and Simple Admission Process from collecting the student inquiries to completing the admission with lots of automation. You can add & manage all the related documents, convert a student inquiry to prospects, perform much more automation & automatically nurture them to admissions using the Best CRM for Educational Institutions & Training Institutes.

Universities and colleges are increasingly using customer relationship management (CRM) tools to help them easily engage with their students, analyze and answer organizational questions, and improve their institution's ability to make information-based decisions.

1.1 Overview

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.

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.

Learning resources

The Real Time Salesforce Project for schools and colleges:

 Object & Relationship in Salesforce

- ✚ Profile
- ✚ Users
- ✚ Reports
- ✚ Permission sets
- ✚ Reports

1.2 Purpose

A school CRM (Customer Relationship Management) software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention. This type of software is aimed at simplifying and streamlining the enrollment and retention process and provides valuable insights into student behaviour and preferences, which can help schools and preschool to make data-driven decisions.

CRM software lets you store customer and prospect contact information, identify sales opportunities, record service issues, and manage marketing campaigns, all in one central location — and make information about every customer interaction available to anyone at your company who might need it.

What are the three uses of CRM systems?

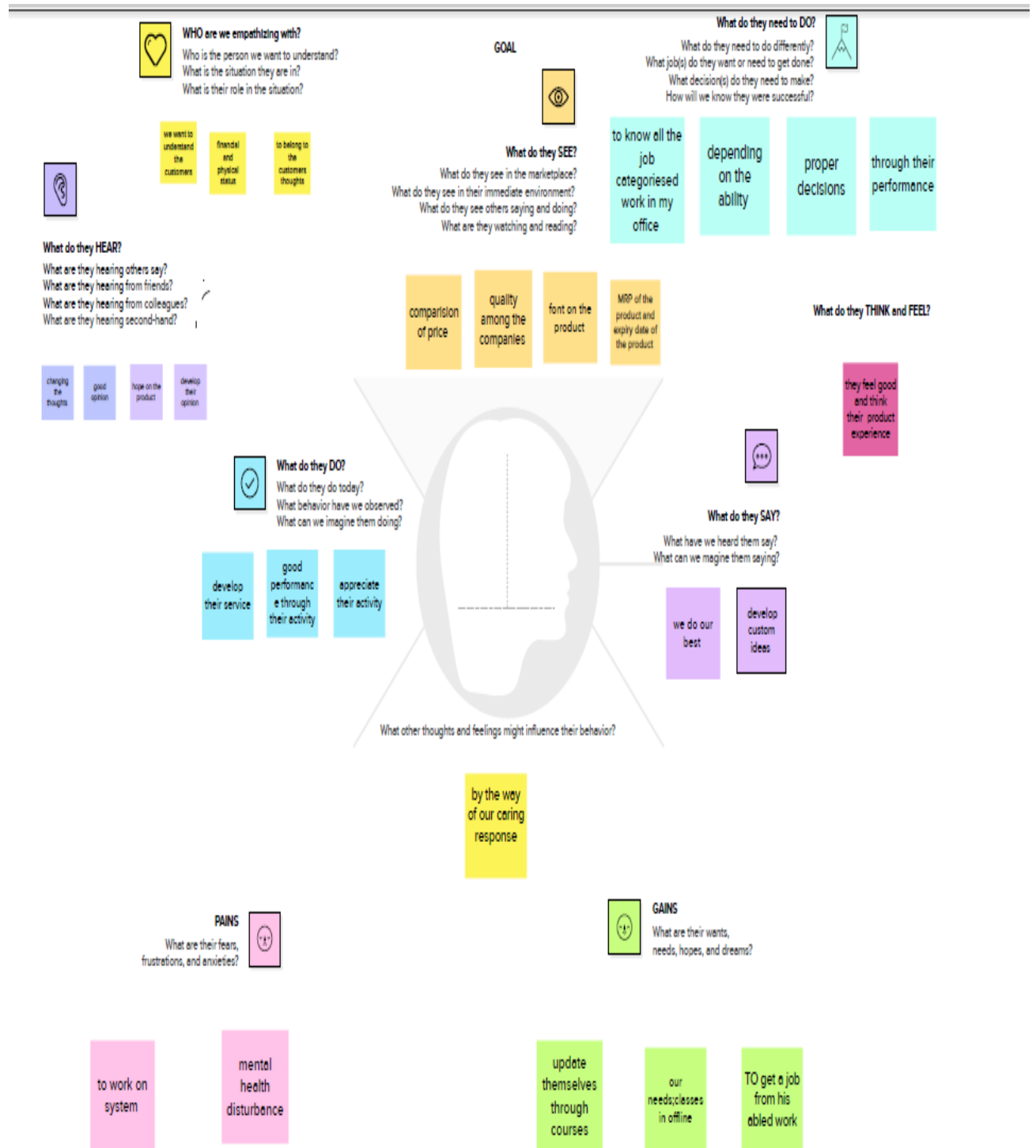
A CRM can analyze sales, customer support, and customer engagement data to provide insights into customer acquisition, experience, and retention—all of which you can use to optimize your strategy. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized.

Schools are facing more competition than ever before, and they need to find innovative ways to attract and retain students. One solution that many schools are turning to is School CRM software. This technology helps schools manage their relationships with students and parents, and it can be a powerful tool for increasing admissions. In this blog, we'll explore what is CRM software for Schools, how it works, and how it can help in boosting enrollment and improving student engagement.

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.

2 Problem Definition & Design Thinking

2.1 Empathy Map





Empathy map
canvas

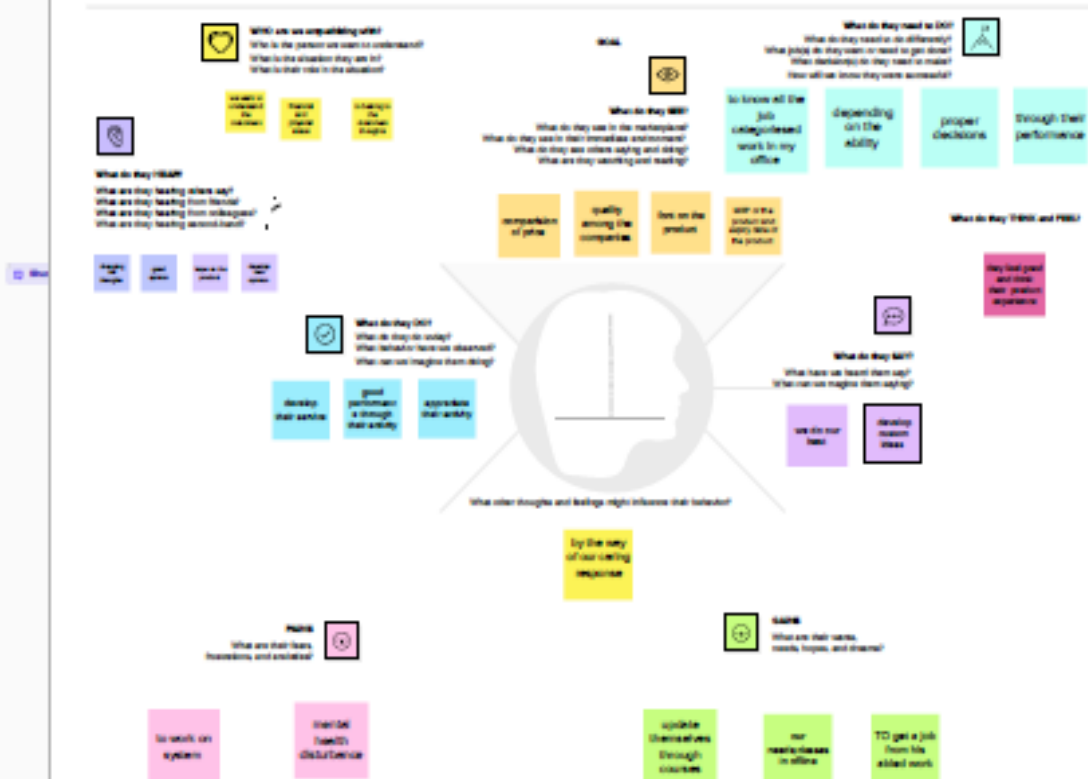
Use this framework to empathize with a customer, user, or any person who is affected by a team's work. Document and discuss your observations and note your assumptions to gain more empathy for the people you serve.

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Develop shared understanding and empathy

Turn the data you have gathered related to the people that are impacted by your work. It will help you generate ideas, prioritize features, or discuss decisions.



Paste the empathy map screenshot

2.2 Ideation & Brainstorming Map

Brainstorm & idea prioritization

Use this template to your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- 6 reference pages
- 1 theme selection
- 10 people recommended

Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do in getting going.

1. Choose

2. Set priority

3. Set target

4. Set time

Define your problem statement

What problem are you trying to solve? Frame your problem as a clear, high-level statement. This will be the focus of your brainstorm.

1. Choose

2. Set priority

3. Set target

4. Set time

Brainstorm

Write down any ideas that come to mind. Don't worry about your problem statement.

1. Choose

2. Set priority

3. Set target

4. Set time

Group ideas

Take time during your brainstorming session to select ideas to group. Once all ideas are written down, group them into categories that make sense. It's okay to have more than one group, try and make it as clear as possible.

1. Choose

2. Set priority

3. Set target

4. Set time

Prioritize

Now it's time to rank the ideas. Use the same page about which is most important. Rank your ideas on the grid to determine which ideas are important and which are feasible.

1. Choose

2. Set priority

3. Set target

4. Set time

After you collaborate

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Paste the Ideation & brainstorming map screenshot

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

10 minutes to prepare
1 hour to collaborate
2-8 people recommended

Share template feedback

Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

Open article

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

How might we [your problem statement]?

Key rules of brainstorming

To run an smooth and productive session

- Stay in topic
- Encourage wild ideas
- Defer judgment
- Listen to others
- Go for volume
- If possible, be visual

Brainstorm

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

10 minutes

TIP

You can select a sticky note and fit the word (based on size) so it can be used drawing!

Logeswari G

Mahalakshmi S

Kishoreni M

Kaleeswari M

Person 5

Person 6

Person 7

Person 8

Group ideas

Take turns sharing your ideas while clustering similar or related red sticky notes have been grouped, give each cluster a sentence that bigger than six sticky notes, try and see if you and break it up into s

20 minutes

Need some inspiration?

Here's a random selection of the templates in our library.

Open examples

Logeswari G

logical and also supportive for the advisor to see the comment write in the confirmation email, like the place,time and student info.

Make the student comment required before booking the appointment.

The confirmation for the application of schools or colleges like as below "Add student comment to the advisor's"

sometimes students meet with advisors on a one-off basis and those advisors or not assigned to the student on their success team.

if the students are meeting in online, display as part of the class scheduler can utilize in their portal.

some students signed up multi times with different email address which caused duplicates and the inflated is must be avoided.

Mahalakshmi S

Increase the character length on the comment of the students application field

Aviod external ads while watching the online classes

when the students watching the another android application while going on the online class, it would be must watch by the admine.

easy process to apply online for the any courses in all over india

Krishnaveni M

rename the photo and other doc. correction in the easy process	compare other applications of the well-known countries	find new ideas faster than other upgrade source.
Increase the number of leads coming in, helping your students team.		

Kaleeswari M

phone number should be verified upon the signup	Developing confidential statement among students	system update is very must.
the process is too easy and it will be consume long ago		

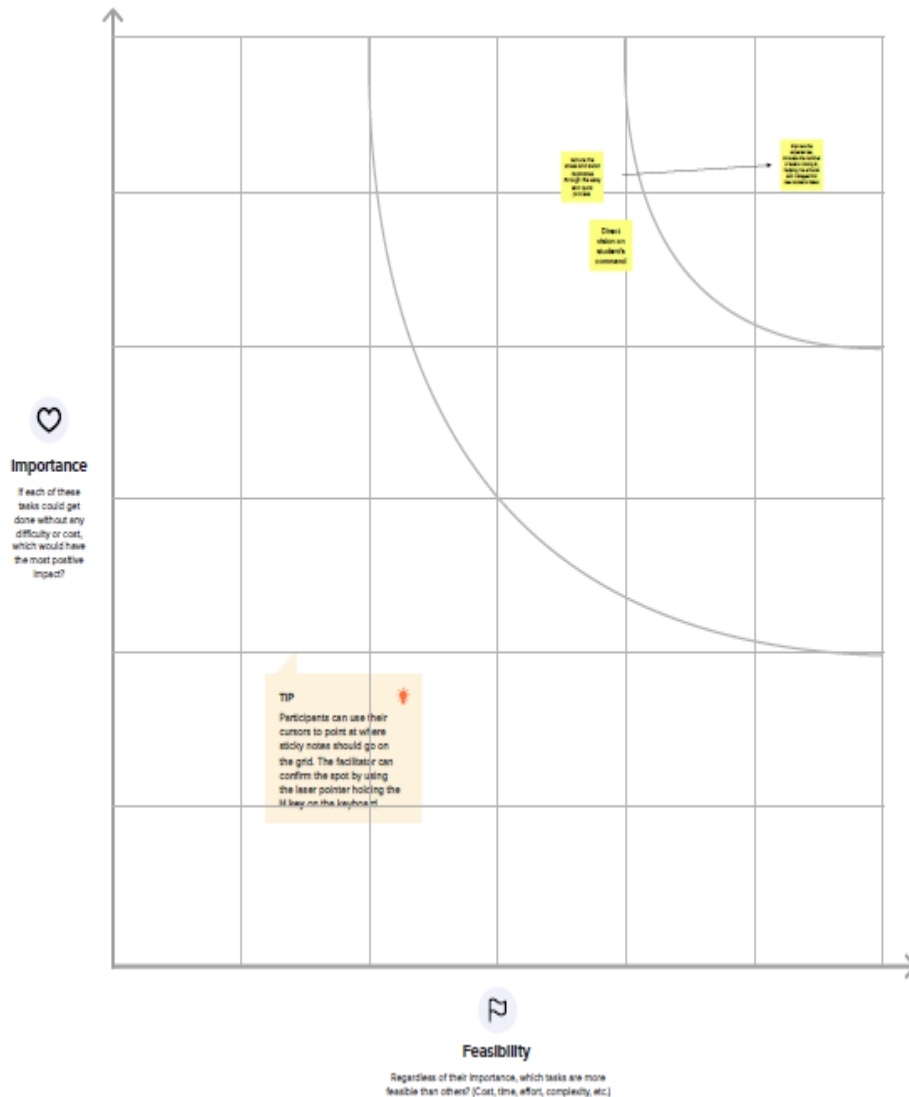
Group ideas

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

Universities provide hostel facilities to students. If we were able to create hostel management app where we could track student housing info. like the name, room number, floor and hygiene .	contact custom unique ID it would be great to have custotmisable matching criteria based on any field on the contact using AND/OR logic. Eg. If I could match on something as complex and custom as: External_ID_c OR ((first name or nick name) AND Last name	when posting within the power Of us hub, it should be possible to identify the following topics: *Admissions connect *Accounting subleader *student success hub
Currently you can create queues for leads, cases and custom objects. students would like the ability to create queues for opportunites	It would be great if there is a standard way to integrate opportunities in most university admission with HEDA	Rename the photo on retail execution app before attaching it to the record
Increase the character length on the "comment" field on success plane template task object.	students to sign up with phone number instead of email address. the phone number should be verified upon sign up with a code sent to the uservia text or phone call.	each time the user logs back in it should be verified with a phone number as well.
the purpose is to verify legit users, minimize spam, fraudulent users.The impact would be do have cleaner data and to reduce duplicates.		

a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.

Prioritize



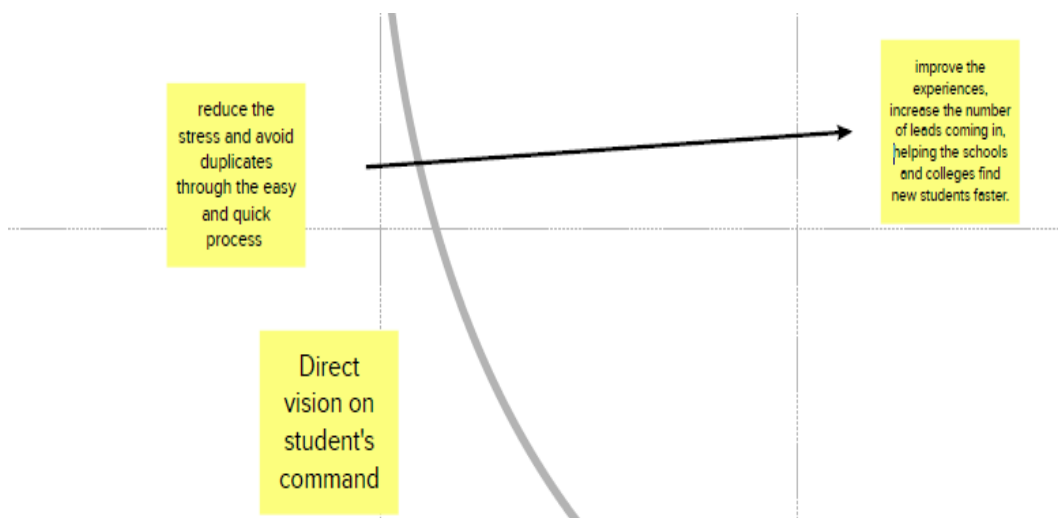
Quick add-ons

- A Share the mural**
Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
- B Export the mural**
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward

- Strategy blueprint**
Define the components of a new idea or strategy.
[Open the template ->](#)
- Customer experience journey map**
Understand customer needs, motivations, and obstacles for an experience.
[Open the template ->](#)
- Strengths, weaknesses, opportunities & threats**
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.
[Open the template ->](#)

[Share template feedback](#)



3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
School (obj1)		
	Field label	Data type
	Address	Text Area
	District	Text Area
	State	Text Area
	School websites	Text Area
	Phone	Phone Number
	Number of students	Roll-up summary
	Highest Marks	Roll-up summary
Student (obj 2)		
	Field label	Data type
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent (obj 3)		
	Field lable	Data type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

Create Salesforce Org

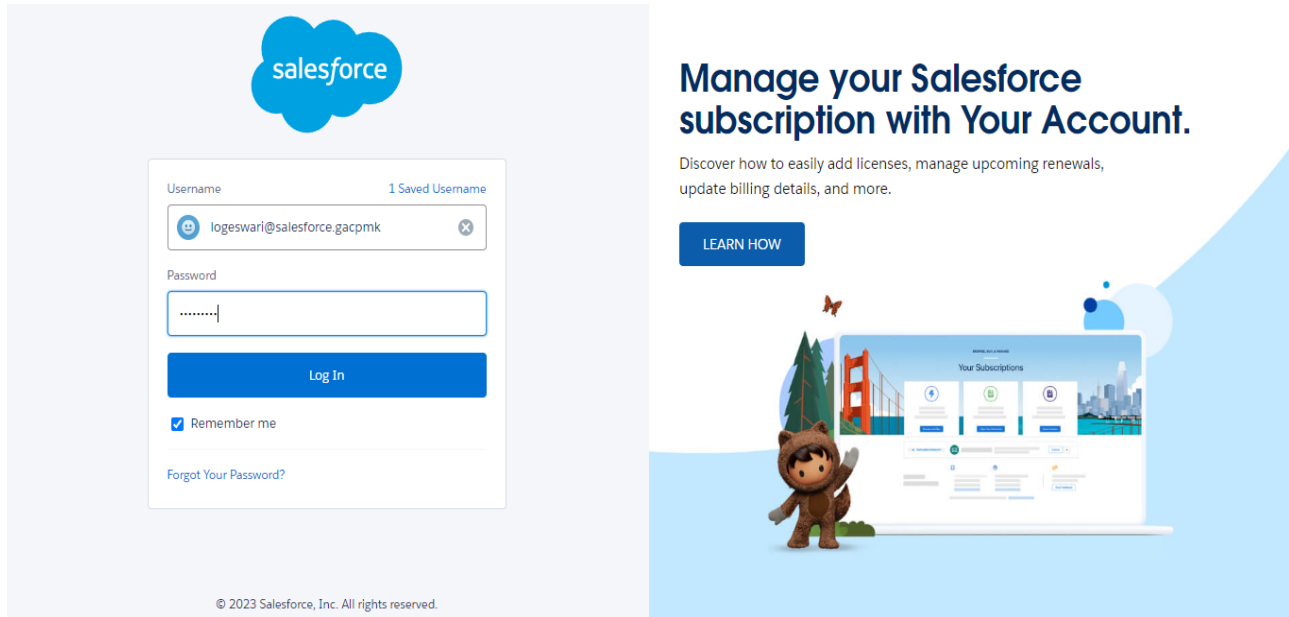
Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

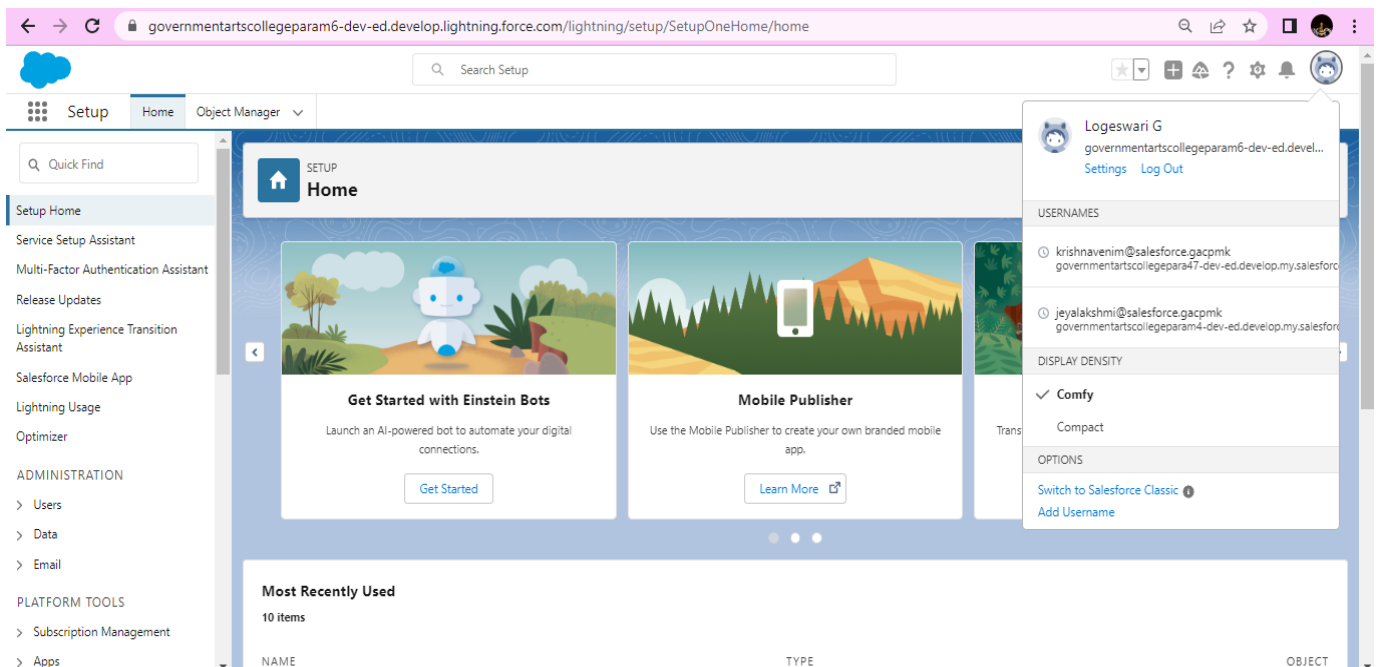
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.



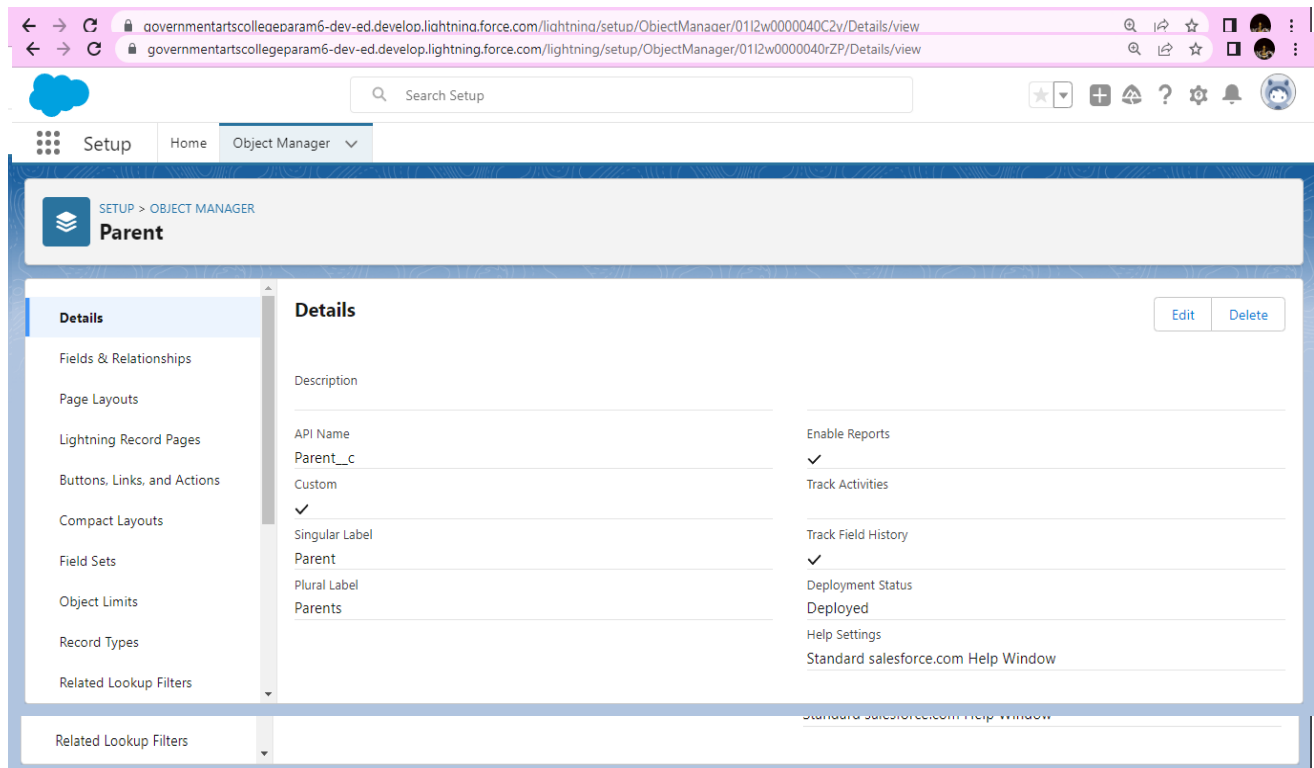
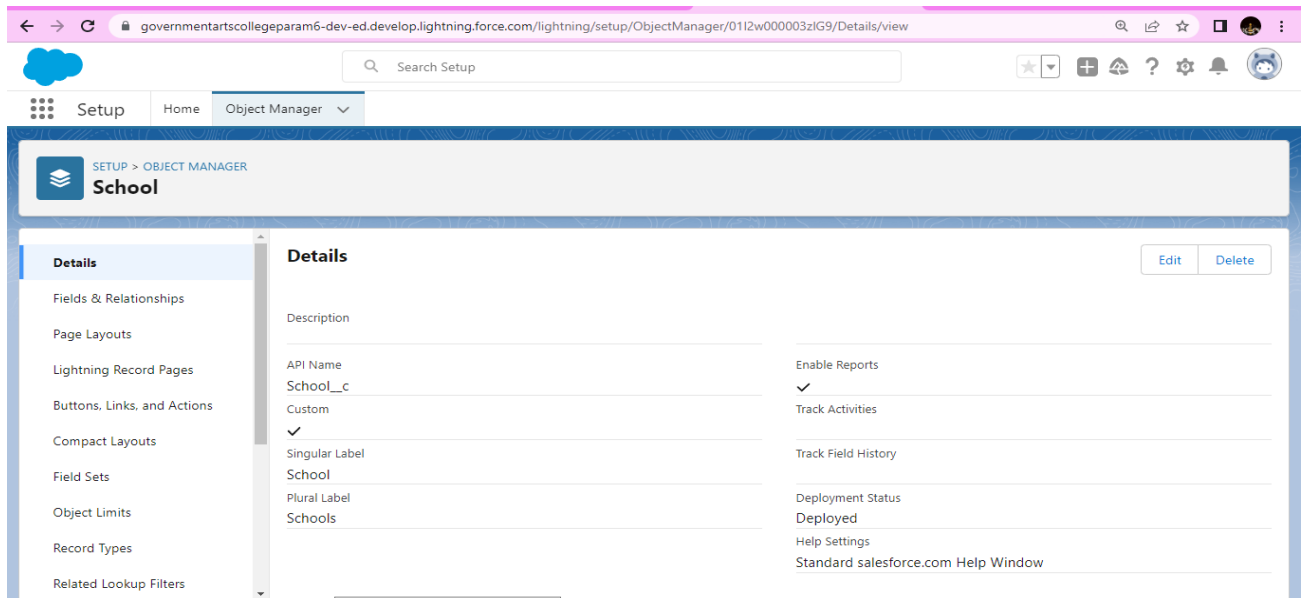
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been



Object

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

For this school management we need to create 3 objects i.e school, parents and students.



Lightning App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs

The screenshot shows the Salesforce Lightning App Manager interface. The left sidebar contains a navigation menu with categories like Data, Apps, Connected Apps, Lightning Bolt, and Mobile Apps. The 'Apps' category is selected, and the 'App Manager' sub-item is highlighted. The main content area displays a table of 29 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'School Management' app is highlighted in the list.

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
20	Salesforce Files	Salesforce_Chatterbox	Manage and share files...	23/03/2023, 7:35 am	Connected (Managed)	
21	Salesforce for Android	Chatter_for_Android	Salesforce for Android ...	23/03/2023, 7:35 am	Connected (Managed)	
22	Salesforce for iOS	Chatter_for_iOS	Salesforce for iOS gives...	23/03/2023, 7:35 am	Connected (Managed)	
23	Salesforce Scheduler Se...	LightningScheduler	Set up personalized ap...	16/03/2023, 9:55 am	Lightning	✓
24	SalesforceA	SalesforceA	You, the hardworking, ...	23/03/2023, 7:35 am	Connected (Managed)	
25	School Management	School_Management	School management m...	11/04/2023, 4:27 p...	Lightning	✓
26	Service	Service	Manage customer servi...	16/03/2023, 9:52 am	Classic	✓
27	Service Console	LightningService	(Lightning Experience) ...	16/03/2023, 9:52 am	Lightning	✓
28	Site.com	Sites	Build pixel-perfect, dat...	16/03/2023, 9:52 am	Classic	
29	Subscription Managem...	RevenueCloudConsole	Get started automating...	16/03/2023, 9:52 am	Lightning	✓

- ❖ App Launcher-Displays available apps.
- ❖ App Name-Displays the current selected app.
- ❖ Navigation menu-Displays the tabs available inside the app.

The screenshot shows the Salesforce Lightning App interface for the 'School Management' app. The top navigation bar includes the app name 'School Management' and a list of tabs: Schools, Students, Parents, Reports, Dashboards, and a user profile. The 'Schools' tab is selected. The main content area displays a list of schools, with 'GPD Management School' listed under the 'Recently Viewed' section. The interface includes a search bar, a 'New' button, and an 'Import' button.

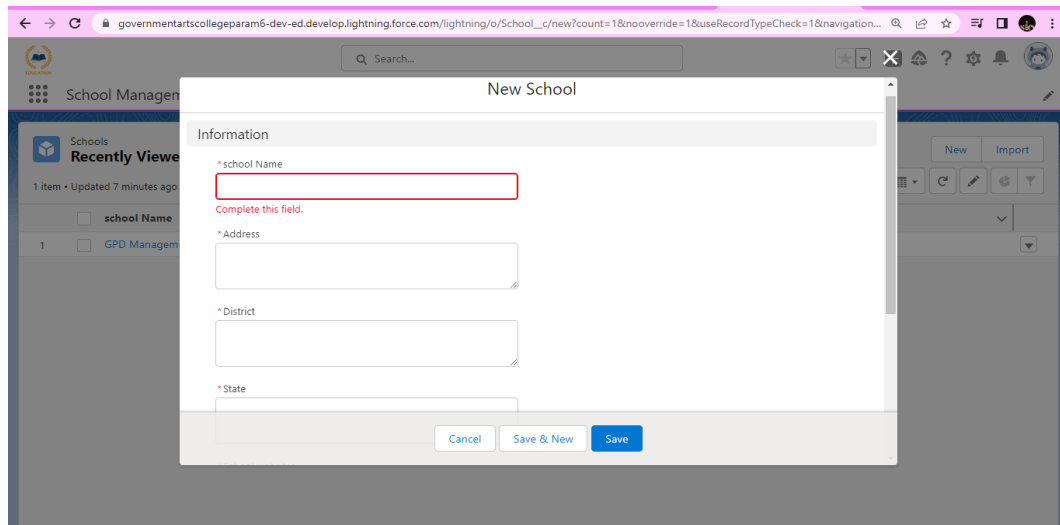
Fields And Relationship

An object relationship in Salesforce is a two-way association between two objects.

Relationships are created by creating custom relationship fields on an object.

This is done so that when users view records, they can also see and access related data.

Creation Of Fields For The School Objects

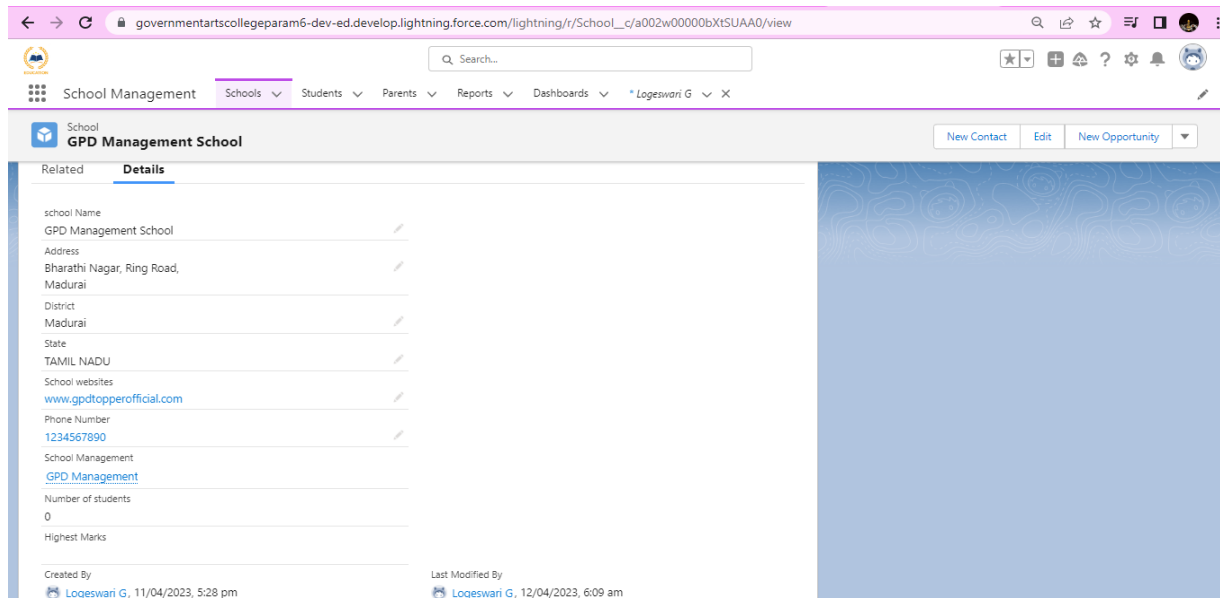


The screenshot shows a 'New School' form in a Salesforce Lightning interface. The form is titled 'New School' and is part of the 'School Management' app. It contains several input fields for school information:

- school Name**: A required field (indicated by an asterisk) with a red border and a red error message 'Complete this field.'
- Address**: A required field (indicated by an asterisk).
- District**: A required field (indicated by an asterisk).
- State**: A required field (indicated by an asterisk).

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

For an example,



The screenshot shows a record view for 'GPD Management School' in the 'School Management' app. The record is displayed in a table-like format with the following fields:

Field	Value
school Name	GPD Management School
Address	Bharathi Nagar, Ring Road, Madurai
District	Madurai
State	TAMIL NADU
School websites	www.gpdtopperofficial.com
Phone Number	1234567890
School Management	GPD Management
Number of students	0
Highest Marks	

At the bottom of the record, there is a 'Created By' field showing 'Logeswari G' and a 'Last Modified By' field showing 'Logeswari G'.

Creation Of Fields For The Student Objects

The screenshot shows a web browser window with the URL `governmentartscollegeparam6-dev-ed.develop.lightning.force.com/lightning/o/Student_/new?count=5&nooverride=1&useRecordTypeCheck=1&navigation...`. The interface is a Salesforce Lightning page titled "School Management" with a sidebar menu showing "Students" and "Schools". The main content area displays a "New Student" modal form. The form has a title bar "New Student" and a close button. Below the title bar is a tab labeled "Information". The form fields are as follows:

- * Student Name**: A text input field with a red border and a red error message "Complete this field." below it.
- Phone Number**: A text input field.
- * School**: A search input field with a magnifying glass icon and a placeholder "Search Schools...".
- Marks**: A text input field.
- Class**: A text input field.
- Results**: A dropdown menu with "--None--" selected.

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

Creation Of Fields For The Parent Objects

The screenshot shows a web browser window with the URL `governmentartscollegeparam6-dev-ed.develop.lightning.force.com/lightning/o/Parent_/new?count=6&nooverride=1&useRecordTypeCheck=1&navigation...`. The interface is a Salesforce Lightning page titled "School Management" with a sidebar menu showing "Schools", "Students", "Parents", "Reports", and "Dashboards". The main content area displays a "New Parent" modal form. The form has a title bar "New Parent" and a close button. Below the title bar is a tab labeled "Information". The form fields are as follows:

- * Parent Name**: A text input field with a red border and a red error message "Complete this field." below it.
- Parent Address**: A text input field.
- Parent Number**: A text input field.

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

On the right side of the form, there is an "Owner" section showing a user icon and the name "Logeswari G".

Creation On Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

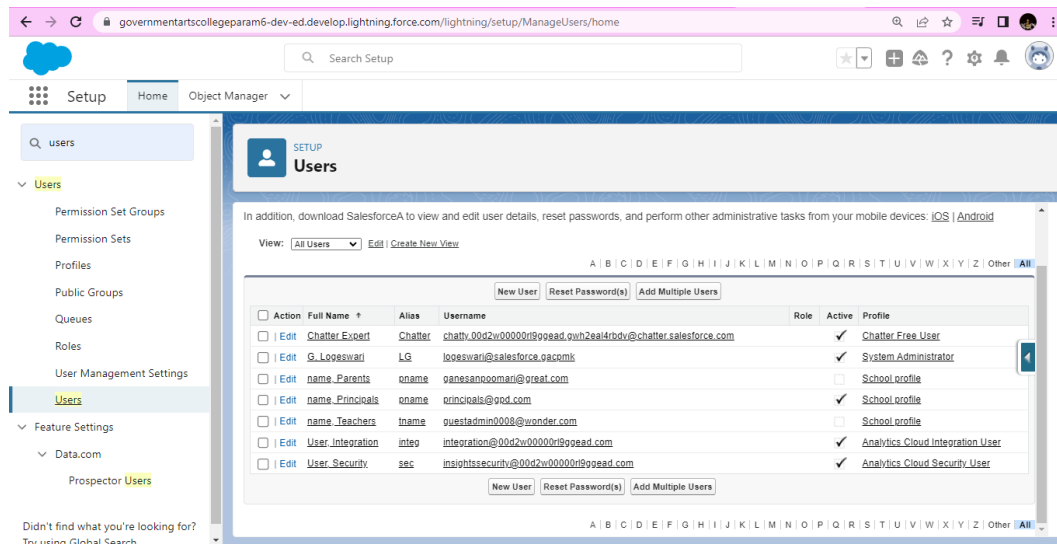
The screenshot shows the Salesforce Setup interface for a profile named 'School profile'. The left sidebar contains a search bar with 'profile' and a list of navigation items: Users, Profiles, and a search result for 'profile'. The main content area is titled 'School profile' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this, there are links for 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. The 'Profile Detail' section shows the profile name 'School profile', user license 'Salesforce', and a checkbox for 'Custom Profile' which is checked. The 'Page Layouts' section lists various layouts for different objects, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Object Milestone, Operating Hours, Opportunity, Opportunity Product, Order, and Order Product. Each layout has a 'View Assignment' link.

In Custom Object Permissions and Give view all access permissions and assign to the parent profile

The screenshot shows the 'Custom Object Permissions' section of the 'School profile' configuration. It includes a table for 'Custom Object Permissions' with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The table lists permissions for 'customer details', 'Parents', 'sales details', 'Schools', 'School Managements', and 'Students'. The 'Schools' row has checkboxes for 'Basic Access' and 'Data Administration'. The 'School Managements' row has checkboxes for 'Basic Access' and 'Data Administration'. The 'Students' row has checkboxes for 'Basic Access' and 'Data Administration'. Below the table, there is a 'Session Settings' section with a 'Session Times Out After' setting of '2 hours of inactivity' and a 'Session Security Level' setting of 'Required at Login'.

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.



create 3 users as Teachers and principals through the salesforce license.

Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Creation of teacher permission:

Give the name of the Permission set name as teacher permission and then under the object settings give the view create and edit permissions to all custom objects and assign to the teacher user

governmentartscollegeparam6-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00009fIKp

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

SETUP Permission Sets

Permission Set teacher permission [Video Tutorial](#) | [Help for this Page](#)

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	teacher_permission
License	Salesforce	Namespace Prefix
Session Activation Required	<input type="checkbox"/>	Created By
		Logeswari G. 12/04/2023, 8:21 am
Last Modified By	Logeswari G. 12/04/2023, 11:30 am	

Apps

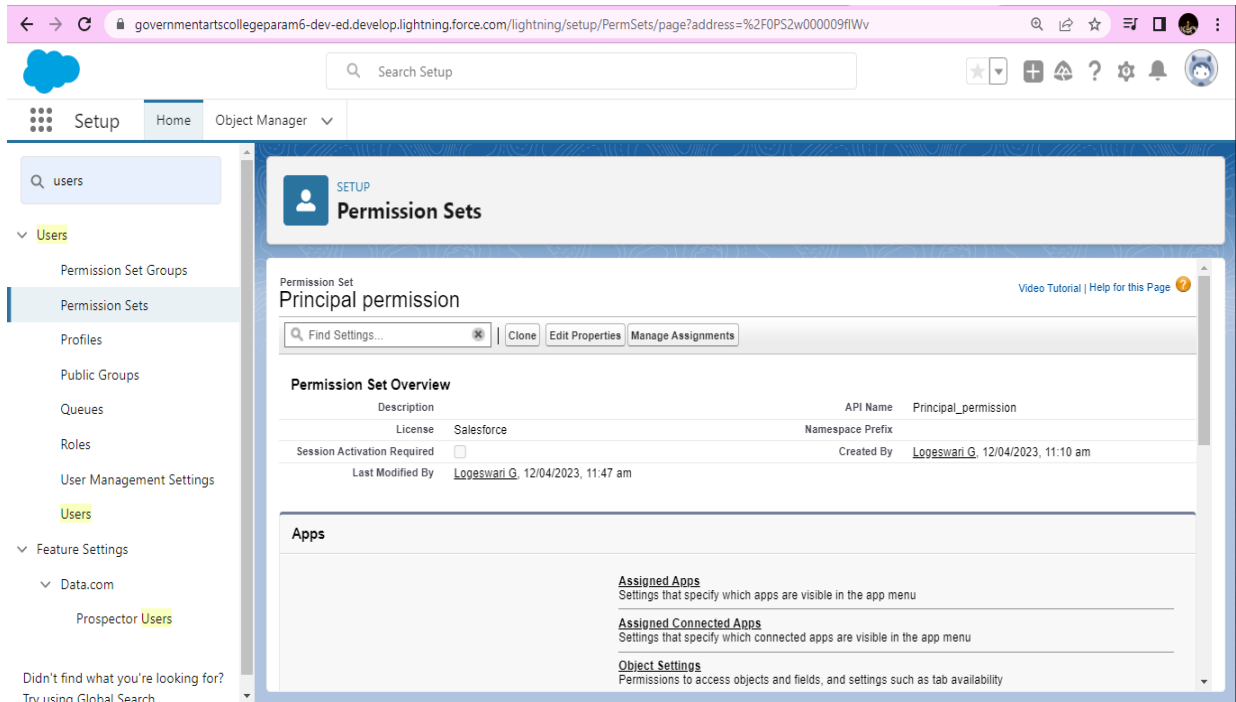
Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

Creation of principal permission:

Give the name of the Permission set name as Principal permission and then under the object settings give all permissions for the custom objects and assign them to the Principal user.



Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

- Click on the Reports Tab and Click on the New Report
- Create a Report on New School with students and parents Report
- In the Columns Select all reports.
- Click on Save and Run.

governmentartscollegeparam6-dev-ed.develop.lightning.force.com/lightning/r/Report/0002w00000E5ysoEAD/view?queryScope=userFolders

School Management Schools Students Parents Reports Dashboards Logeswari G

Report: Accounts
School with parents and students

Total Records: 14

Parent Account	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
- (14)	-	Logeswari G	678	-	-	-	12/04/2023
	-	Logeswari G	543	-	-	-	12/04/2023
	-	Logeswari G	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	16/03/2023
	-	Logeswari G	Edge Communications	TX	Customer - Direct	Hot	16/03/2023
	-	Logeswari G	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	16/03/2023
	-	Logeswari G	United Oil & Gas, UK	UK	Customer - Direct	-	16/03/2023
	-	Logeswari G	GenePoint	CA	Customer - Channel	Cold	16/03/2023
	-	Logeswari G	sForce	CA	-	-	16/03/2023
	-	Logeswari G	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/03/2023
	-	Logeswari G	University of Arizona	AZ	Customer - Direct	Warm	16/03/2023

Row Counts Detail Rows Subtotals Grand Total

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/lgpld>

Team Member 1 -

<https://trailblazer.me/id/mmahalakshmi15>

Team Member 2 - <https://trailblazer.me/id/kalem22>

Team Member 3 – <https://trailblazer.me/id/krish1462003>



4 ADVANTAGES & DISADVANTAGE

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.

3. Improving The Organization Management Process.

The use of automation tools helps in the control and management of employees. With the help of CRM for university technologies, you can get data on the effectiveness of each of your teachers and students.

4. Increased Customer Loyalty

And the following is are the always the other advantages of CRM

-  **Better customer service**
-  **Increased sales**
-  **Improved customer retention**
-  **Detailed analytics**
-  **Managed communications with prospective leads**
-  **Higher productivity and efficiency**
-  **Improved customer segmentation**
-  **Automated sales reports**

As per insights from Salesforce.org customers and the Total Economic Impact Study by Forrester Consulting, the Cloud boasts of;

- 11% increase in enrolment
- 38% faster response to student needs
- 40% increase in student engagement
- 60% reduction in Information Technology expenses
- 80% improvement in staff productivity
- 195% ROI with a 7 month payback period
- \$2.4M total legacy cost savings
- Increase in alumni and donor involvement and funds

Disadvantage

Although the benefits are many, there are disadvantages on the other hand.....

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

If staff come to rely too heavily on **CRM software**, it reduces their flexibility in dealing with customer queries. They often become helpless in the face of questions from clients where the information isn't on the system and which requires lateral thinking to solve the problem. This has obvious implications for the customer experience and clients may become frustrated, taking their business to a competitor.

Security concerns associated with centralised data.

There are risks associated with keeping a lot of data in one place. With stringent regulations surrounding data (GDPR, for example), businesses face severe penalties in the event of security breaches. When it comes to CRM software, it is vital that security processes are put in place to protect clients' personal information. This can be a significant expense for a business, but the costs associated with not having such safeguards in place are far higher.

The excess initial time and productivity cost of implementation

There will be a steep learning curve for staff with any new system. It will take some time for employees to find their feet with the CRM system and mistakes will be made. It's for the management team to ensure that there's adequate buy-in and support in the process of transitioning. This can be expensive as it distracts manpower from their core tasks. The benefits when the

CRM system *is* in place, however, will far outweigh the initial time and productivity costs.

It requires a process-driven sales organisation.

To maximize the return on investment (ROI) in a CRM system, it is necessary to have a process-driven sales regime. A CRM can be used simply as a data store that can be mined for insights, assuming that that data is updated consistently. However, the real value comes from using it to manage the sales pipeline, flagging issues early and holding people to account. This reduces lost deals, increases upsell rates and provides much-improved revenue forecasting. Where no formal sales process exists, introducing one can be a massive change for some companies—one which may require extensive investment in people, retraining, a whole philosophical shift in the business' sales approach and quite a lot of short-term expense and pain.

5 APPLICATIONS

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.

For example, to see all leads that have been generated from an organic Google Search you can use the 'source type' filter to achieve this. Filtering your leads allows you to more easily send targeted and personalised email communication to different audience segments.

You can focus on quality leads

If you've created a [strong enrolment strategy](#) by nurturing prospective leads with targeted events, email communications, a responsive website, and more, it's likely that you'll see an increase in enrolments coming through your portal. Once you have these leads, it's important to distinguish between leads that are still in the 'shopping' phase and serious leads that are driven to enrol at your school.

But how do you differentiate these leads? That's where lead scoring comes in. [Lead scoring](#) allows you to rate the quality of the relationship and interactions between a lead and your school to determine which students may be the best fit for your school and which families will be best served by your unique selling points. It's likely that your school has an outline of the perfect application and leading scoring allows you to prioritise and find the applications that have attractive attributes in the sea of submissions. Attributes that could be assigned to your lead scoring could be proximity to campus if a student's parent is alumni, if the students' sibling attends the school or if they have an interest in particular areas such as sport or music.

Build better relationships

The 'customer' in school customer relationship management is generally prospective parents who are considering enrolling their child in your school. As the parent makes key decisions for their child, they're the focus of school CRM.

The goal of using a CRM system is to develop meaningful, [personal relationships](#) with prospective families, resulting in the ultimate conversion: an enrolment. The steps or stages through which the prospective parent passes (the customer journey) focus on encouraging the parent to enrol. These stages include lead nurturing activities, such as open days and student interviews.

CRMs offer an incredible amount of opportunity for your school because enrolment decisions rely heavily on the strength of your relationships with parents. Using a CRM to manage parent relationships allows schools to:

- track every communication with a prospective family
- understand which stage of the admissions journey a family is in
- set reminders or tasks to create follow-ups
- send families communications that are targeted to their requirements or the child's interests.

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

Reduce clunky processes and admin

Some of the benefits of a school CRM are internal, offering efficiencies for your school's registrar or admissions team. First, your school will benefit from having all key prospective parent data in a single system. This ensures information is not duplicated and is easy to keep up-to-date. Second, having task-setting and bulk communications functionality in your CRM will allow you to continue nurturing prospective parents while saving time. You can also nudge your team to [complete tasks](#) by setting automatic reminders, follow up on a lead or schedule in a call.

When parents know that we're able to fast-track acceptance letters, they're often very keen to start their student as soon as possible. Thanks in large part to Digistorm Funnel, we're able to send parents a letter of offer and allow them to actually sign and pay online within hours!

- *Brendan Wood, Marketing & Community Relations Manager at Green Point Christian College*

Lastly, you can save time and effort with administration tasks with the latest feature of [Digistorm Funnel](#), Automations. Automations is a tool that allows marketing and admissions teams to streamline their daily processes by automating repetitive and tedious tasks. For marketing teams, you can use automations to set up email campaigns for upcoming school events, an incentive campaign to push prospective parents to finish applications, or even a drip campaign for unengaged contacts. Admin and admissions teams can likewise use automations to send a welcome campaign email to new students or use it to streamline onboarding processes. Using workflows and contact triggers you can create multiple automations that cater and nurture your relationships.

Keep track of every new enrolment application

The key impact of the school CRM is that not a single prospective enrolment slips through the cracks. While there may be reasons why prospective parents do not enrol, schools can rest assured when using a CRM that they have every opportunity to build their relationship. Schools using a CRM effectively will see an increase in completed school enrolments and a general improvement in the way that they are managed. Connecting school CRMs with [online enrolment systems](#) can improve the overall visibility of prospective parent data.

You can host your enrolment portal and forms on your school website and once a parent has filled out their application the data will all be stored within your CRM. You can then use the CRM system's basic analytics to access user data and see exactly where your enrolments are coming from. A CRM can also easily be integrated with a Student Information System (SIS) so that your data can be quickly and easily uploaded directly into your existing school system.

Seamlessly manage school events

Does your school host [events](#) for prospective, current, and past students and families? A CRM can help make the event organisation and execution process easier, with features that keep track of your event registration, attendance, and new leads. With Digistorm Funnel, you can create detailed registration forms for your school open day tours, manage your registrations, and send email reminders directly in the CRM.

On the day of the event, you can use the live search results in the events functionality, which means at an event you can search for an attendees' name and details to quickly find and check them in. After your event, you can use the CRM to easily view the number of registered attendees versus the number of people that actually attended.

Digistorm Funnel is our leading CRM, specifically designed for schools who have described it as a 'game-changer' to their admissions processes.

While features vary by department or industry, 6 advantages of CRM platforms that enables customer-centric experiences are:

- Single view of the customer for the cross functional insight insight and reporting.
- Dashboards that visually showcase data in action.
- Customer-centric automation.
- Proactive service.
- Optimized processes.
- Simplified collaboration.

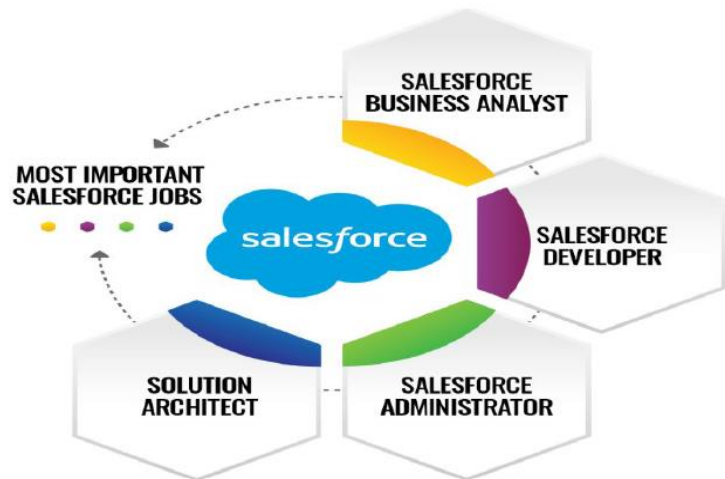


Salesforce Career

Salesforce skills leads to competitive salaries, on average, jobs with salesforce skills pay around \$80000 per year.

Different skills in salesforce career:

- Salesforce Administration
- Salesforce Developer
- Business Analyst
- Salesforce Architect
- Salesforce Consultant
- Salesforce Designer
- Marketing, Sales and Service careers.



1. A Holistic View Of Stakeholders

Every interaction with all stakeholders such as prospective, current, and ex-students, donors & affiliates, is consolidated into a single view. The cloud collates all relevant information from across sources, using a mobile phone, social & cloud technologies. It provides a 360-degree view of students and engages them on the device of their choice. Detailed reports and dashboards are included as well.

2. Effective, Customized/ Personalized Communications

The Education Cloud empowers institutions by delivering outstanding digital engagement with relevant, engaging, and personalized messaging to stakeholders. It also centralizes and streamlines operations for teams across campus.

3. Marketing & Enrolment Automation

The marketing automation feature of the Salesforce Education Cloud maps critical points like student journeys, campaign management, budget tracking, social marketing, and personalized messaging to be sent. While the enrolment process from the pre-lead stage to the final enrolment is taken care of by the Sales automation feature of the solution.

4. Grant & Loan Application Management

Grant concepts, funding, budget tracking, and project updates to sponsors are automated and so is loan application management for internal and 3rd party partners for loan approvals. With this, the extended follow-ups and back and forth communication regarding the student loan processing is cut short giving everyone a transparent view into the status.

5. Recruitment Made Easy

Education Cloud for Recruitment and Admissions' enables institutions to deliver a relevant and proactive outreach to prospective students. With the entire data consolidated in one single place, you can now recruit the right students, improve yield, increase recruiter productivity and boost performance.

6. Supports Students

The unique array of Salesforce Education Cloud solutions enables colleges of any dimension to boost their student engagement, deliver unified advising, streamline services, and unlock access to careers.

7. Multi-Department Collaboration

Different departments across campus, need to work together to make things run smoothly. The Education Cloud provides a smooth, seamless experience for students connecting all the different departments, for an engaged and collaborative experience free from silos or frustrations.

8. Nurtured Relationships

The Education Cloud helps you impress and grab your recipients' attention, with your attention to detail, engaging them at a deeper level, nurturing your relationship with them. Departments can harness the consolidated solution to drive major grants & online fundraising, enjoy enhanced reporting with AI, and nurture relations further.

THANK YOU!