

Project Report Template

INTRODUCTION: -

1.1 Overview

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.

1.2 Purpose: -

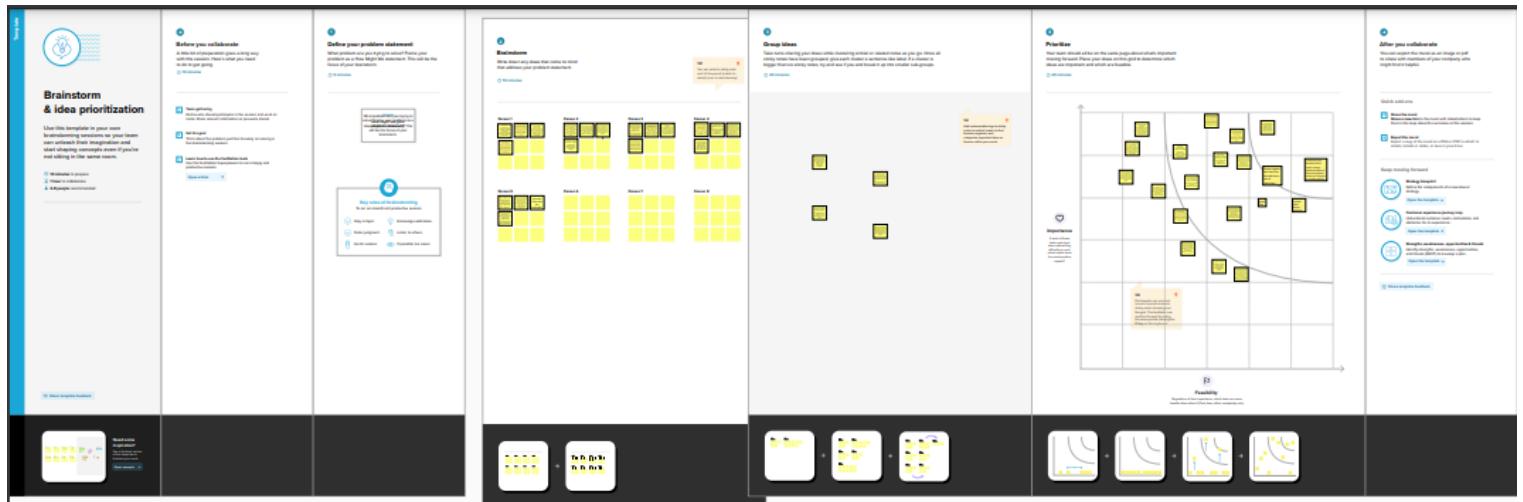
A school CRM (Customer Relationship Management), software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention. This type of software is aimed at simplifying and streamlining the enrollment and retention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

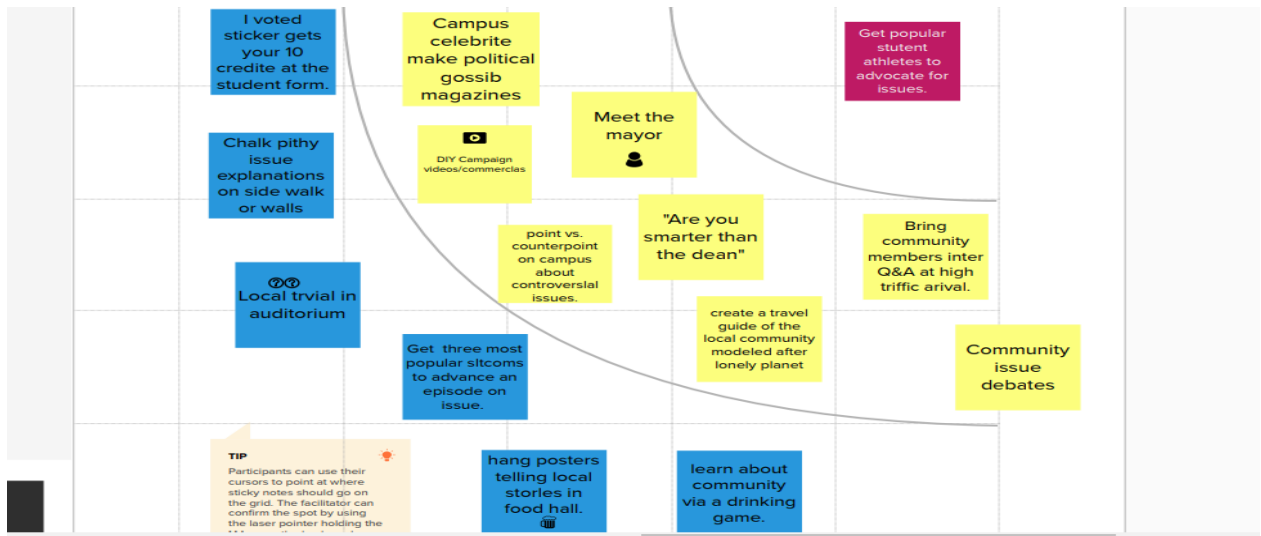
2.Problem Definition and Design Thinking: -

2.1. Empathy Map



2.2 Ideation and Brainstorming map Screenshot:





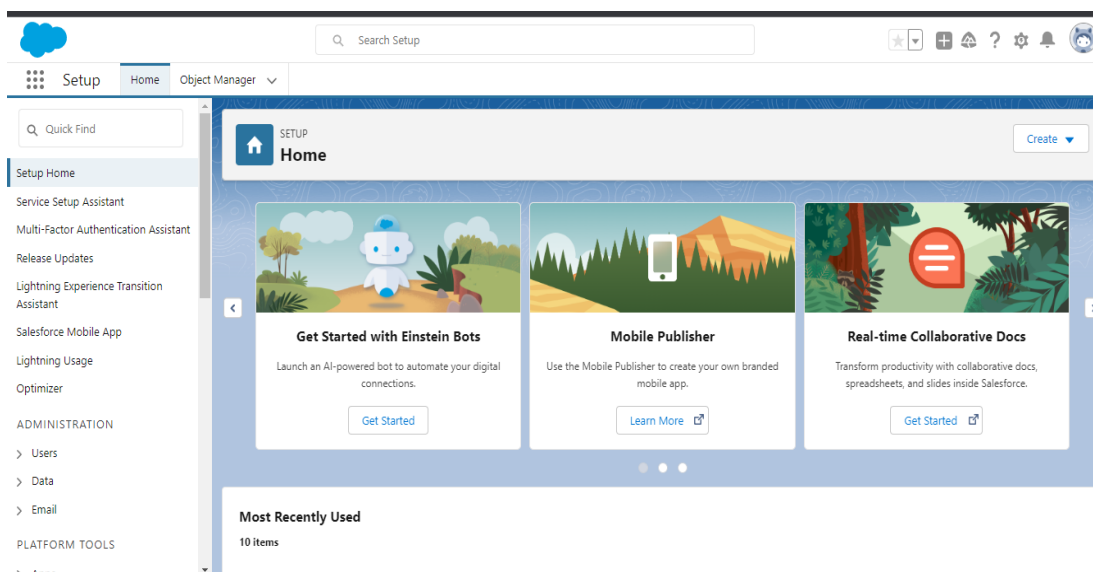
3.RESULT: -

3.1 Data Model:

Object name	Fields in the Object
Object-1	Field Label: phone number Data Type:Phone
Object -2	Field Label:Schools Data Type:Picklist
Object-3	Field Label:Parent address Data Type: Text

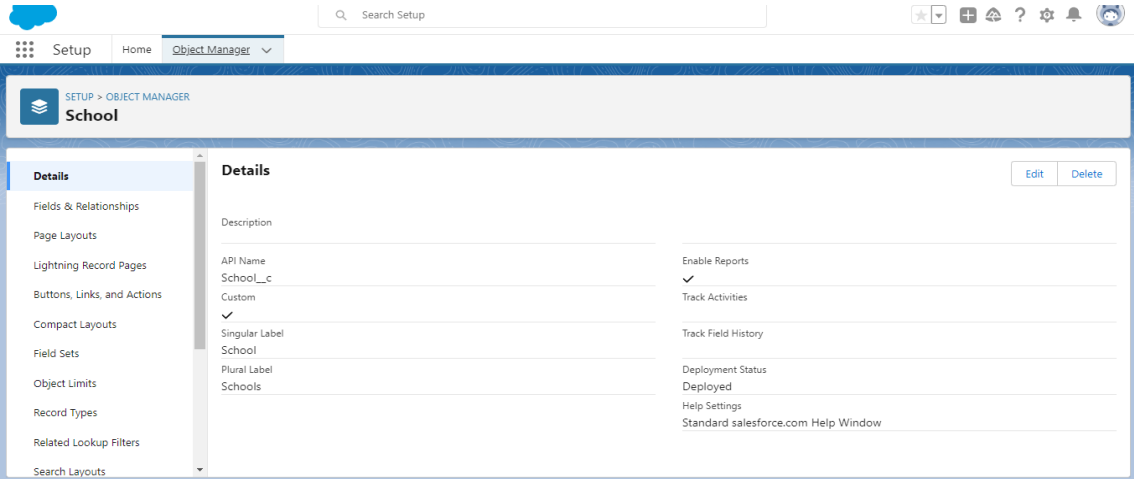
3.2 Activity and Screenshot: -

Create salesforce Org-creating Developer Account

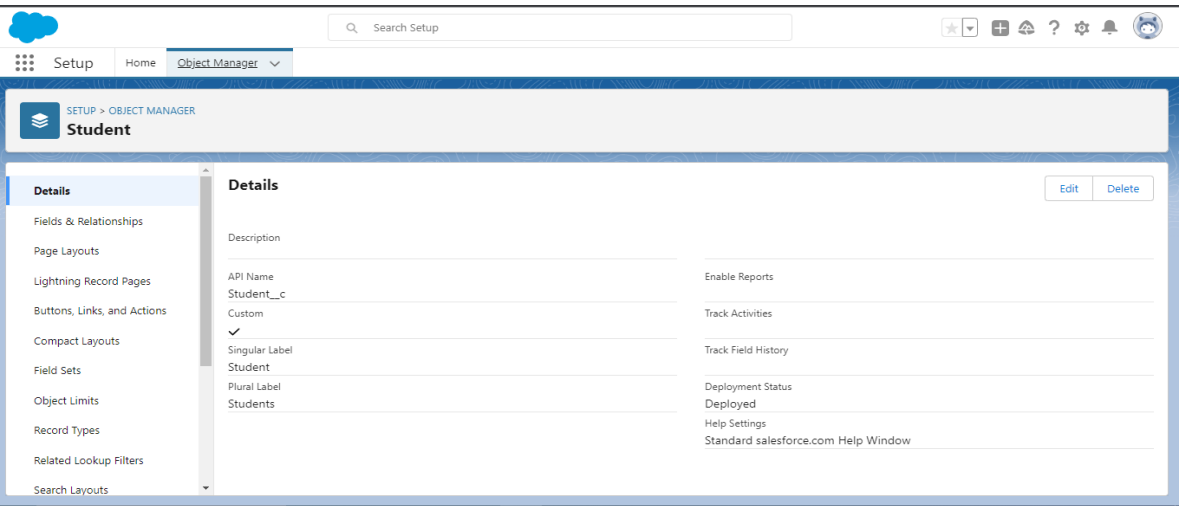


Object:

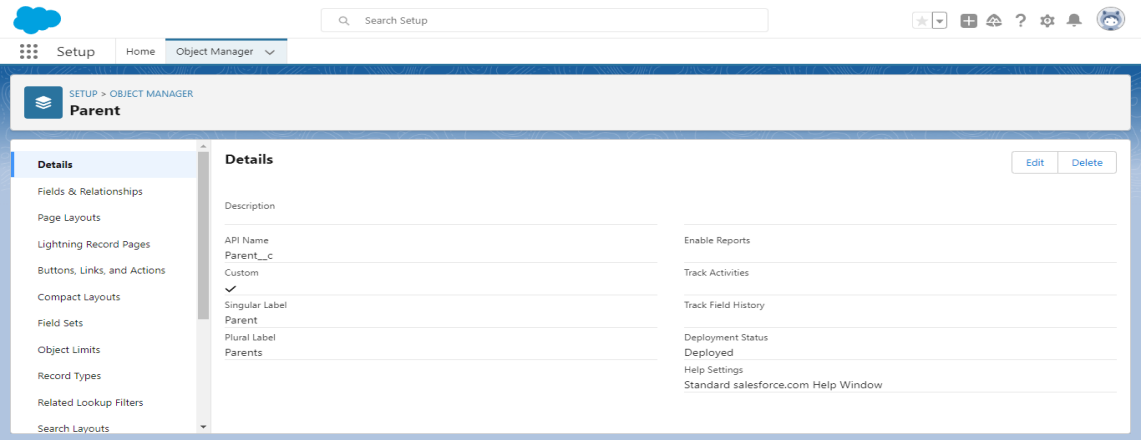
Creation of school object



Creation of Student Object

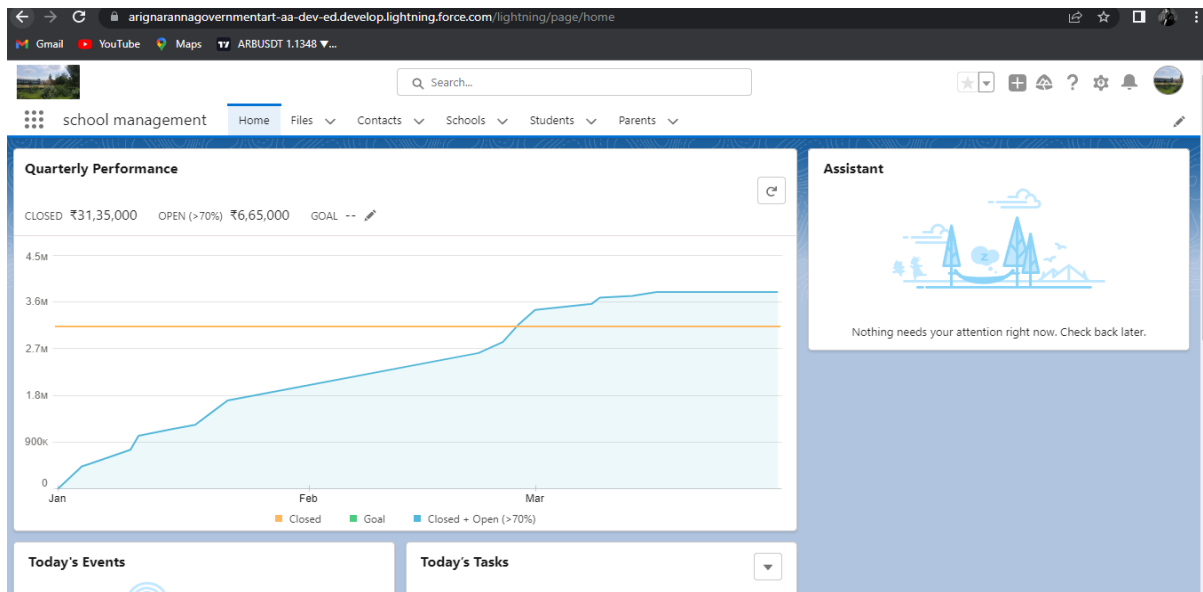


Creation of Parent Object



Lighting App

Create The School Management App



Field and Relationship

Creation Field for The Schools Objects

Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number_c	Phone		
School Name	Name	Text(80)		✓

Creation Of Fields for The Student Objects

curious-panda-1zyqqm-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0118b000001f0k/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Student

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Phone number	Phone_number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Creation of Fields for The Parent Object

curious-panda-1zyqqm-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0118b000001f0k/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Parent

Details

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

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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Record Types
Related Lookup Filters
Search Layouts

Profile

Creation On Profile

Monika Sankar
A CRM application for schools/colleges at Salesforce associates
Tamil Nadu, India

Tell us about yourself! Add a short bio.

[.me trailblazer.me/id/smonika54321](https://trailblazer.me/id/smonika54321)

Trailhead

EXPLORER

18 Badges
5,225 Points
0 Trails

Earn 3,775 more points to reach *Adventurer* rank.

[Go to Trailhead](#)

0 Certifications

Certifications
Learn how to add additional certifications, including Salesforce, Slack, and MuleSoft to your profile.

[Add Certifications](#)

Community Tags

Add your community tags here

Users

Setup **Users**

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) [Edit](#) [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	B. Javakrishnan	krishnan	javakrishnankeerthana@gmail.com		✓	Force.com - App Subscription User
Edit	Chatter Expert	Chatter	chatty.00d2v00000rpldveav00rexcmrkyo@chatter.salesforce.com		✓	Chatter Free User
Edit	J. KEERTHANA	KJ	javakeerthana955@gmail.com		✓	System Administrator
Edit	J. Ranjith	RK	keerthana722003@gmail.com		✓	Force.com - App Subscription User
Edit	User_Integration	integ	integration@00d2v00000rpldveav.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity@00d2v00000rpldveav.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Permission Sets

Permission 1

arignarannagovernmentart-aa-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00000AAYww%3FsfcdFrameOrigin%3Dhttps%25...

Search Setup

Setup Home Object Manager

Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management

SETUP
Permission Sets

Permission Set
Teacher permission set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Teacher_permission_set
License	Namespace Prefix	
Session Activation Required	Created By	KEERTHANA J. 12/04/2023, 7:23 am
Last Modified By		KEERTHANA J. 12/04/2023, 7:23 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

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Permission 2

arignarannagovernmentart-aa-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w00000AAYx8%3FsfcdFrameOrigin%3Dhttps%25...

Search Setup

Setup Home Object Manager

Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management

SETUP
Permission Sets

Permission Set
Principal permission set

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Principal_permission_set
License	Namespace Prefix	
Session Activation Required	Created By	KEERTHANA J. 12/04/2023, 7:26 am
Last Modified By		KEERTHANA J. 12/04/2023, 7:26 am

Apps

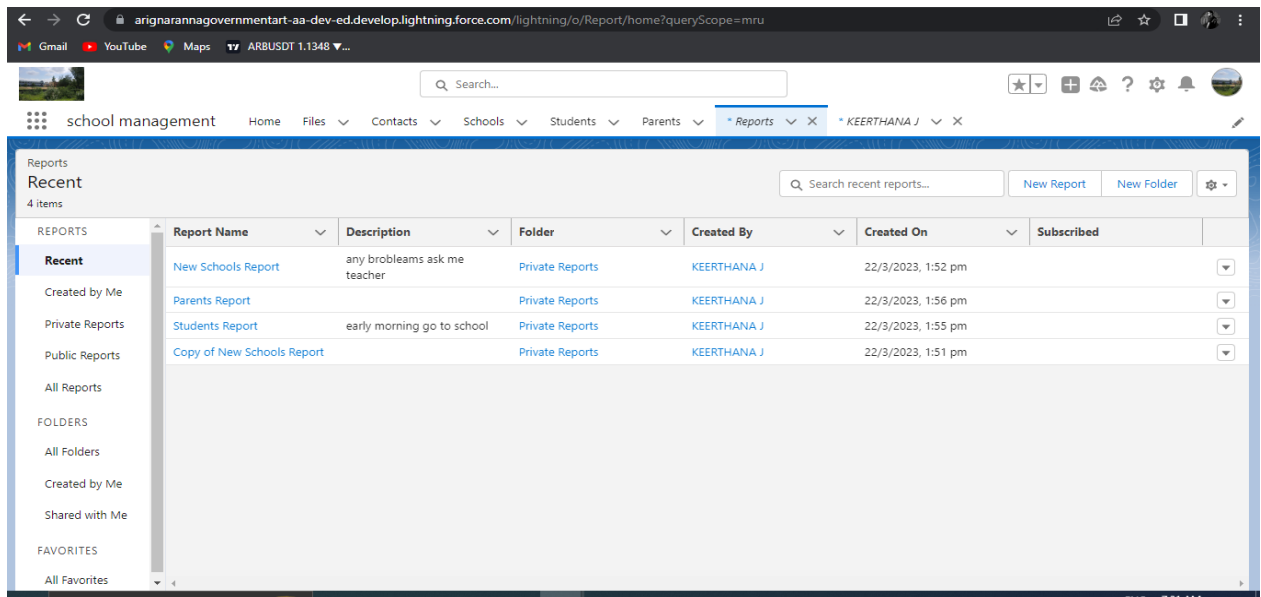
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Permissions to access objects and fields, and settings such as tab availability

App Permissions
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Reports



4.Trailhead Profile public URL

Team Lead- <https://trailblazer.me/id/smonika54321>

Team member 1-<https://trailblazer.me/id/aartu16>

Team member 2-<https://trailblazer.me/id/kowkb1>

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

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

5.ADVANTAGES & DISADVANTAGES:

As you switch to using a CRM software solution for schools, many benefits come along. Not only does it enhance your efficiency on the performance end but also enables you to foster your relationships with existing and potential students/ parents. Here are some of the common benefits:

1. **Increased Efficiency:** School CRM software automates many of the manual processes involved in student and parent communication, data management, and **reporting**. This can save schools time and resources, allowing them to focus on other important tasks. By having all relevant information in one place, staff can access student and parent data quickly and easily, reducing the need for manual data entry and improving accuracy.
2. **Better Student Engagement:** It enables schools to track interactions with students and their parents, and provides a platform for **personalized communication**, this can help schools build stronger relationships with

students, increase engagement, and provide a better overall experience. Schools can also use the software to send targeted communications and track student progress, helping to identify any areas of concern and address them promptly.

3. **Improved Data Insights:** With all data stored in one place, schools can gain valuable insights into student behaviour, preferences, and trends. This information can be used to make informed decisions about admission processes, student engagement, and resource allocation. Schools can also use the data to monitor student progress and identify areas for improvement.
4. **Enhanced Reputation Management:** School CRM software helps schools in managing their reputation by tracking student satisfaction and addressing concerns in a timely manner. By having all relevant information in one place, schools can respond to student and parent inquiries more efficiently and effectively. This can help schools maintain a positive image and build stronger relationships within the community.
5. **Increased Admissions:** School CRM software can automate many of the tasks involved in student enrollment, allowing schools to reach more prospective students and increase admissions. By using the software to track student interactions and send targeted communications, schools can improve their outreach efforts and increase their chances of attracting new students.
6. **Better Alumni Management:** A CRM can help schools keep in touch with alumni and tap into their networks for fundraising and recruitment. Schools can use the software to track alumni interactions, send targeted communications, and organise events. This can help schools maintain strong relationships with their alumni and leverage their networks to support their mission.

APPLICATION:

1. Automated Marketing: The software can automate marketing tasks such as email campaigns, SMS messaging, and social media outreach, allowing schools to reach more prospective students.

2. Lead Management: A CRM can help schools track and manage leads, providing a centralised database of prospective students. This allows schools to prioritize leads and follow up with them in a timely manner.

Personalized Communication: By tracking student interactions and preferences, schools can send personalized communications that are more likely to resonate with prospective students.

4. Data Insights: The software provides valuable insights into student behaviour and preferences, allowing schools to make informed decisions about their recruitment efforts.

5. Improved Outreach Efforts: With all data in one place, schools can analyse trends and make data-driven decisions about their outreach efforts. This can help schools reach the right students with the right message, increasing the chances of attracting new students.

CONCLUSION:

Overall, School CRM software can help schools streamline the enrollment process, reach more prospective students, and increase admissions. It helps schools and preschools in managing student data and interactions, automate tasks related to recruitment and enrollment, and improve the efficiency of their recruitment and retention efforts. It can also help to increase the effectiveness of enrolment campaigns. SCHOOL MANEGEMENT CRM APPLICATION enables you to do all this and much more on a unified platform. Schedule a demo today and learn more about a purpose-built growth solution for schools.

FUTURE SCOPE:

Customer Relationship Management is the best means to reach your customers and serve them in the best way. It automates all those tasks which enterprises used to perform manually. Every organization is set up with some frustrated ambitions and targets. The better the performance of your business, the better the relationship with your customers will be. CRM software Development can turn your business into a powerhouse of sales. Thus, CRM software is no longer essential, in fact mandatory for small and medium businesses. Now, you can easily access the CRM software virtually from anywhere and anytime. All you need an internet connection to further the scope of doing your business. So, don't be late and perform the necessities for implementing the CRM software in your business.

