

1 INTRODUCTION

1.1 Overview

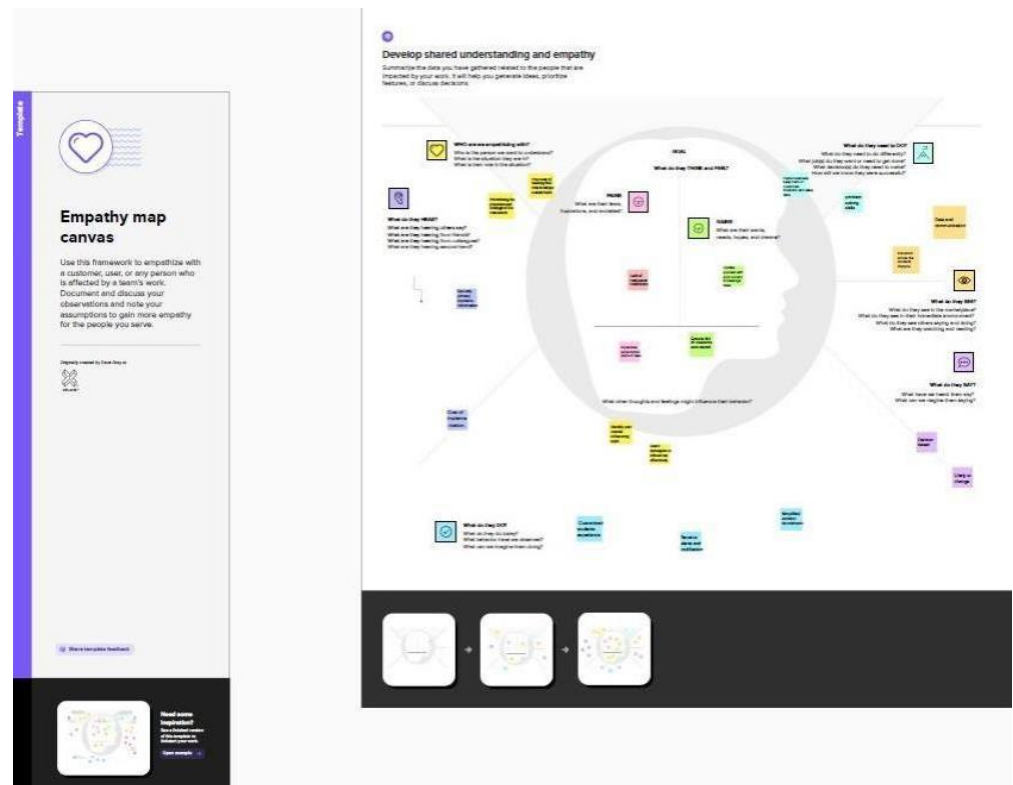
CRM (Customer Relationship Management) applications for schools/colleges are software systems designed to help educational institutions and manage relationships with their students, parents, alumni, and other stakeholders. These applications allow schools to collect and analyze data about these groups to improve engagement and communication.

1.2 Purpose

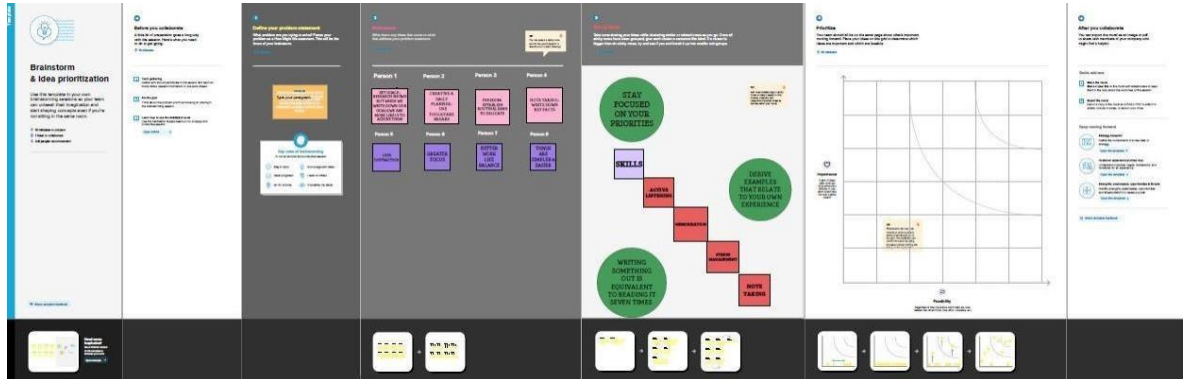
Customer Relationship Management (CRM) applications for schools/colleges serve the purpose of managing relationships and interactions with students, parents, alumni, and other stakeholders. These applications provide a comprehensive system for schools/colleges to manage and track interactions with their constituents and ensure that they are meeting their needs.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

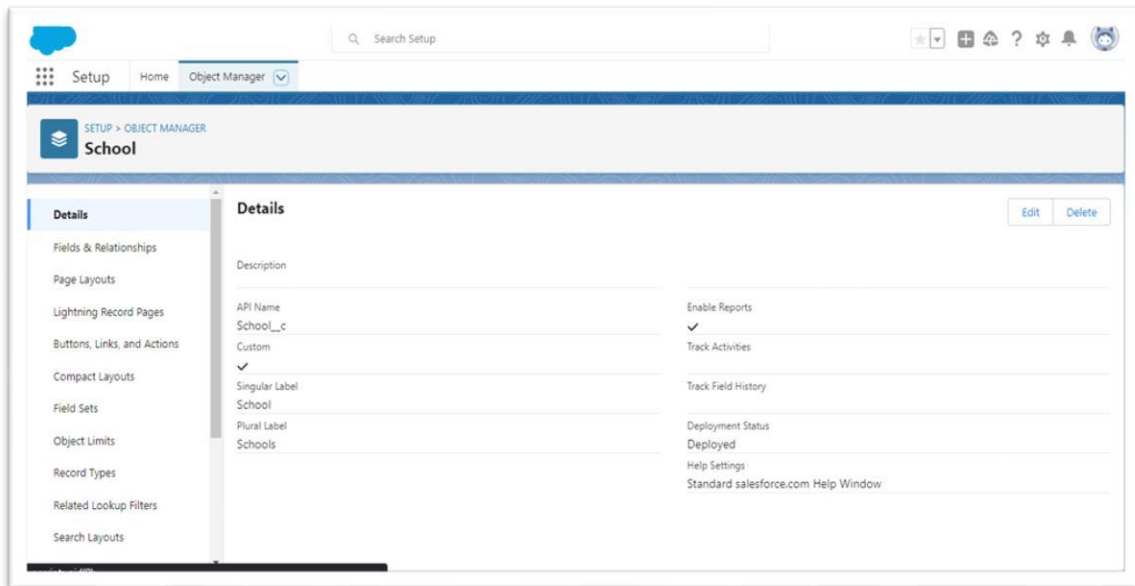
3.1 Data Model:

Object name	Fields in the Object	
School	Field label	Data type
	Address	Text Area
	District	Text Area
	State	Text Area
	School Website	Text Area
	Phone Number	Phone
	Number of Students	Roll –up summary
	Highest Marks	Roll –up summary
Student	Field label	Data type
	Phone Number	Phone
	School	Master –Detail Relationship
	Results	Pick List
	Class	Number
	Marks	Number

Parent		
	Field label	Data type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

ACTIVITY 1-OBJECT CREATION SCHOOL:



STUDENT:

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Student__c

Custom

✓

Singular Label

Student

Plural Label

Students

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

javascriptvoid(0);

PARENT:

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Parent

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Parent__c

Custom

✓

Singular Label

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Plural Label

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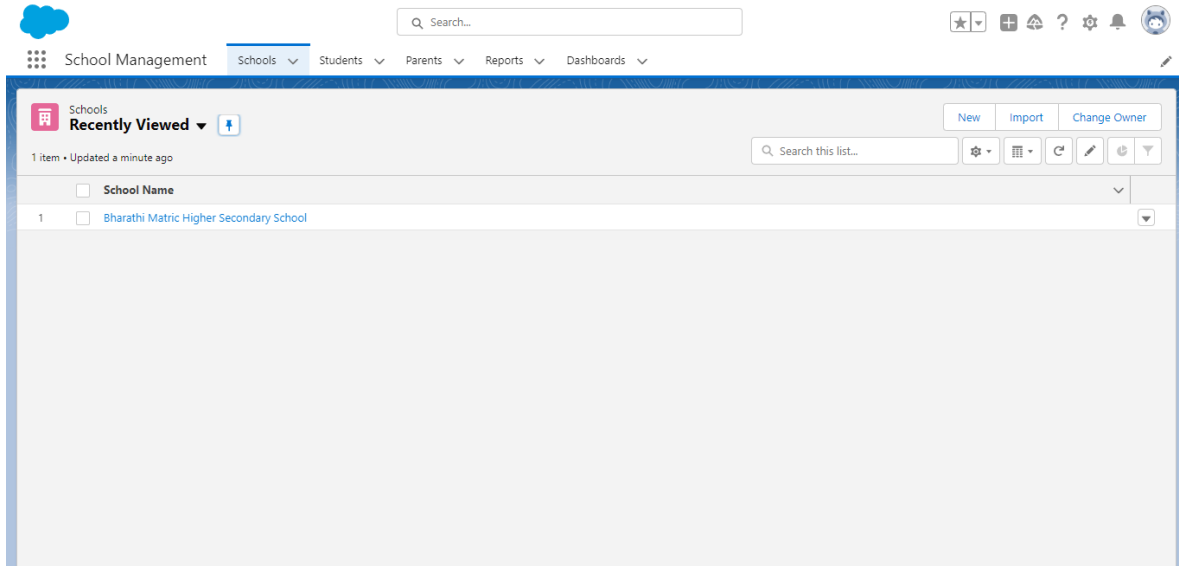
Edit

Delete

javascriptvoid(0);

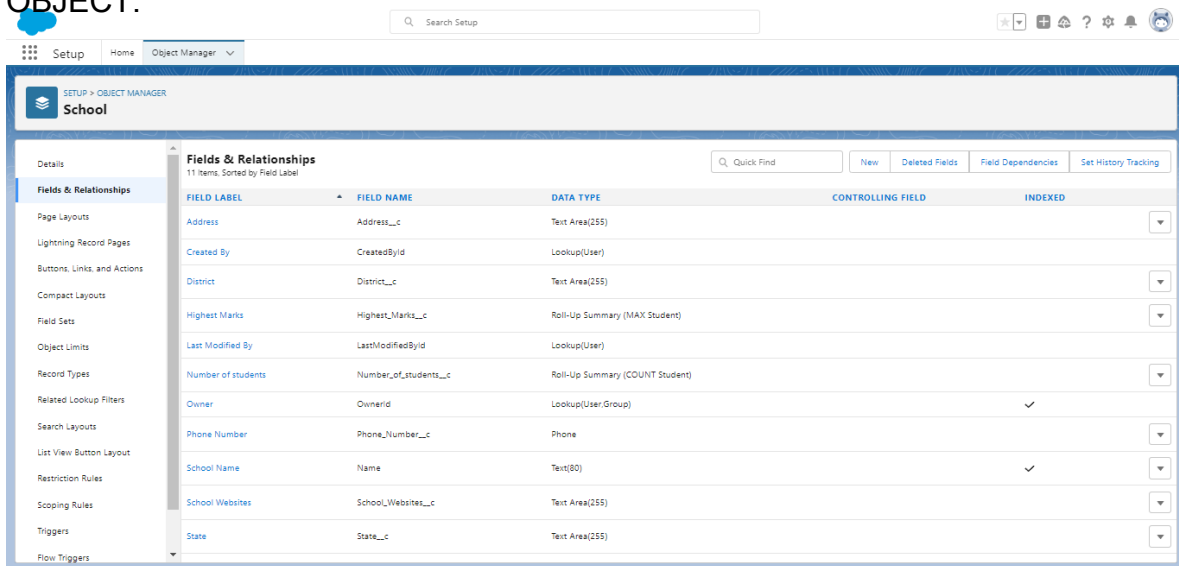
ACTIVITY 2:

LIGHTING APP:

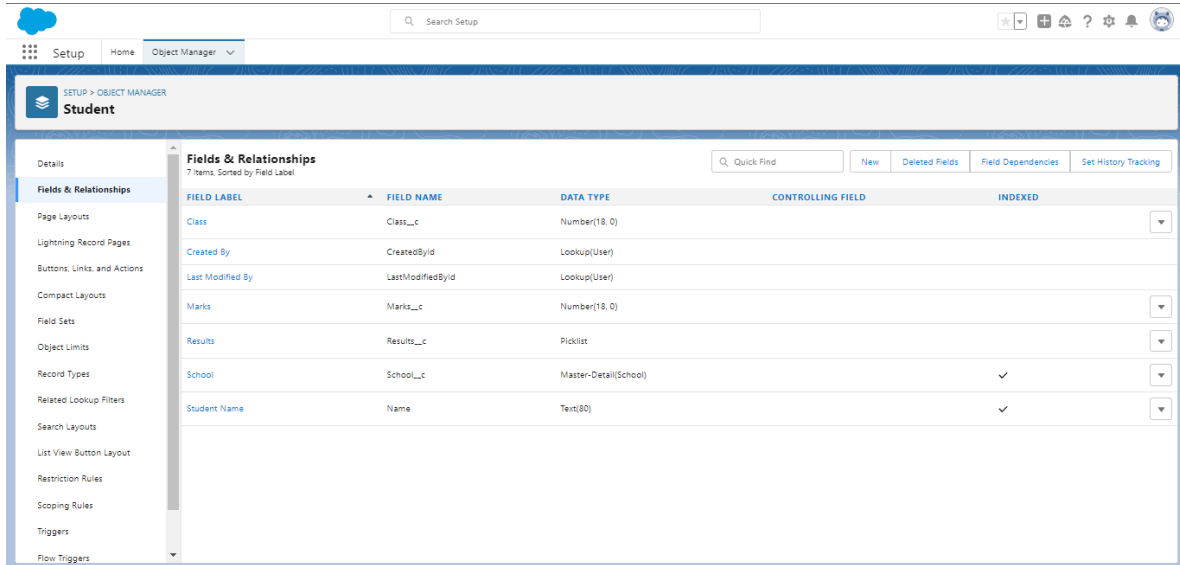


ACTIVITY 3:

FIELDS AND RELATIONSHIP FOR SCHOOL OBJECT:



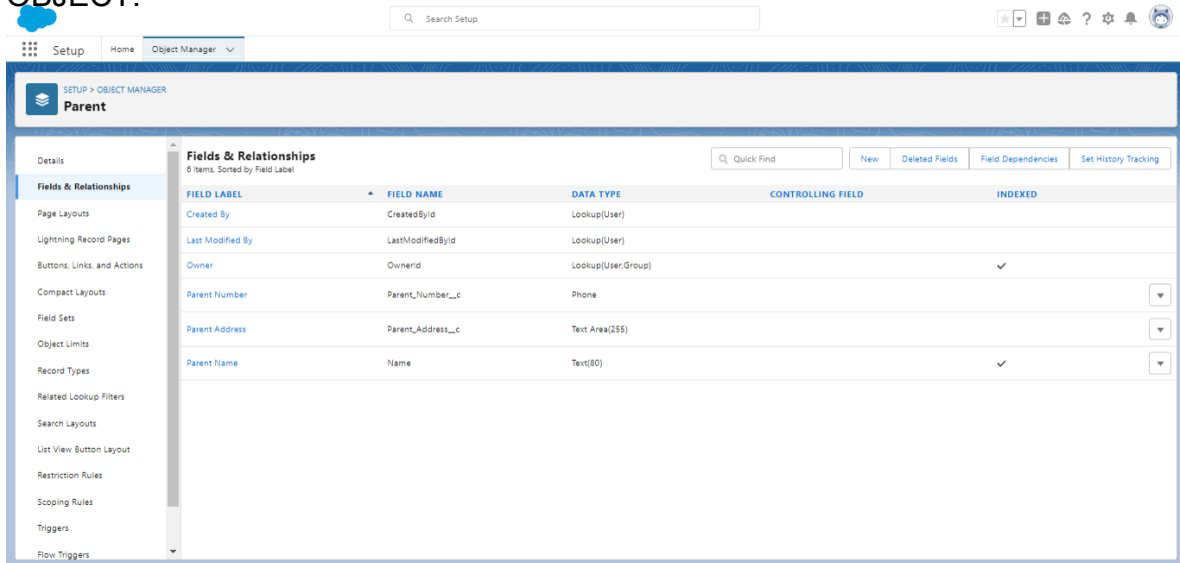
FIELDS AND RELATIONSHIPS FOR STUDENT OBJECT:



The screenshot shows the 'Student' object configuration page. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main area displays a table of fields for the Student object.

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)		
Marks	Marks__c	Number(18, 0)		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

FIELDS AND RELATIONSHIP FOR PARENT OBJECT:



The screenshot shows the 'Parent' object configuration page. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main area displays a table of fields for the Parent object.

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

USER:

REPORTS:

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns **Reports** Dashboards Chatter Groups Calendar People Cases Forecasts More

Search... [icon] [icon] [icon] [icon]

Recent Reports

2 items

	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Parents Report		Private Reports	Ajay S	22/3/2023, 11:52 am	[dropdown]
Created by Me	Schools with Students Report		Private Reports	Ajay S	22/3/2023, 12:23 am	[dropdown]

- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

4 Trailhead Profile Public URL

MAHADEVAN B (TEAM LEAD)

<https://trailblazer.me/id/mahab50>

RAJENDRAN S

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

ANANDHAKUMAR M

<https://trailblazer.me/id/2arunkumar>

CRM Application for Schools/Colleges

ARUNKUMAR R

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

4 ADVANTAGES

- Improved Communication
Personalization
- Streamlined Processes
- Data Analytics
- Improved Student Retention

The areas where this solution can be applied

4 DISADVANTAGES

- Cost
- Complexity
- Data privacy
- Resistance to change
- Overemphasis on metrics
- Risk of data silos

5 APPLICATION

- Student Recruitment
- Admissions Management
- Student Engagement
- Fundraising
- Alumni Relations
- Faculty/Staff Management

6 CONCLUSION

CRM applications for schools and colleges are designed to help institutions manage their relationships with students, parents, and other stakeholders. These applications typically include features for managing student information, tracking enrollment and admissions, managing financial aid and scholarships, and communicating with students and parents. They may also include tools for tracking student performance, managing schedules and calendars, and providing analytics and reporting on student and institutional data. Some of the key benefits of CRM applications for schools and colleges include increased efficiency, improved communication, and better student outcomes.

7 FUTURE SCOPE

Customer Relationship Management (CRM) applications for schools and colleges have a promising future. With the increasing demand for personalized education, CRM applications can help educational institutions to manage relationships with their students, faculty, and other stakeholders effectively. These applications can assist in tracking student progress, managing communication with parents and alumni, and automating administrative tasks such as scheduling and record-keeping. Moreover, with the integration of artificial intelligence and machine learning, CRM applications can provide valuable insights to improve student engagement and learning outcomes. As educational institutions continue to prioritize student success, CRM applications will play an essential role in enhancing the overall educational experience.