



DR.MGR GOVERNMENT ARTS AND SCIENCE COLLEGE FOR WOMEN

DEPARTMENT OF MATHEMATICS

NAAN MUDHALVAN PROJECT

III YEAR BSC MATHEMATICS

A CRM APPLICATION FOR SCHOOLS / COLLEGES	
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TEAM MEMBERS	1.PREETHI L 2.PRAVEENA V 3.PRIYADHARSHINI V

A CRM APPLICATION FOR SCHOOLS / COLLEGES

1 INTRODUCTION

1.1 OVERVIEW

A CRM is a system that helps schools and colleges to 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. A CRM system can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. By personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over time.

1.2 PURPOSE

IMPROVED ENROLMENTS

A CRM system can help counsellors representatives to more effectively manage and track leads ,resulting in improved overall efforts and increased enrolments numbers.

PERSONALISED COMMUNICATION

A CRM system allows educational institutions to personalise communication with prospects or students , resulting in more effective communication and better relationships.

LEAD MANAGEMENT

Educational organisation to more effectively manage leads , including lead scoring, segmentation and personalised follow-up.

IMPROVED STUDENT ENGAGEMENT

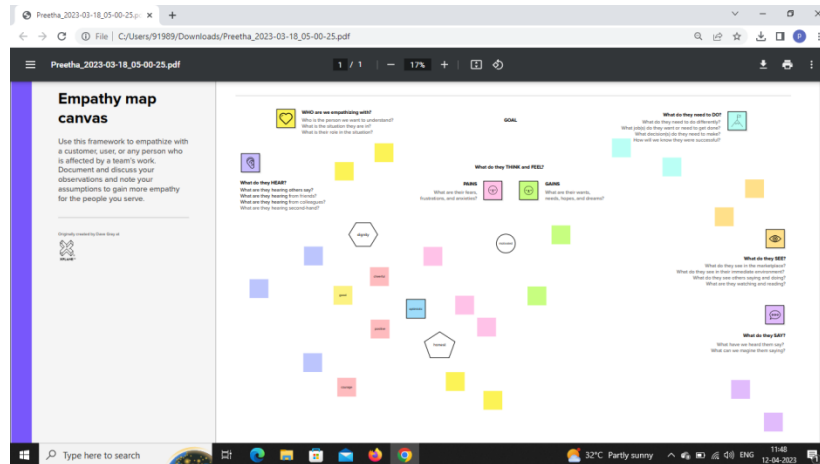
CRM help in improving student engagement by tracking student interactions and providing personalised communication.

BETTER COMMUNICATION

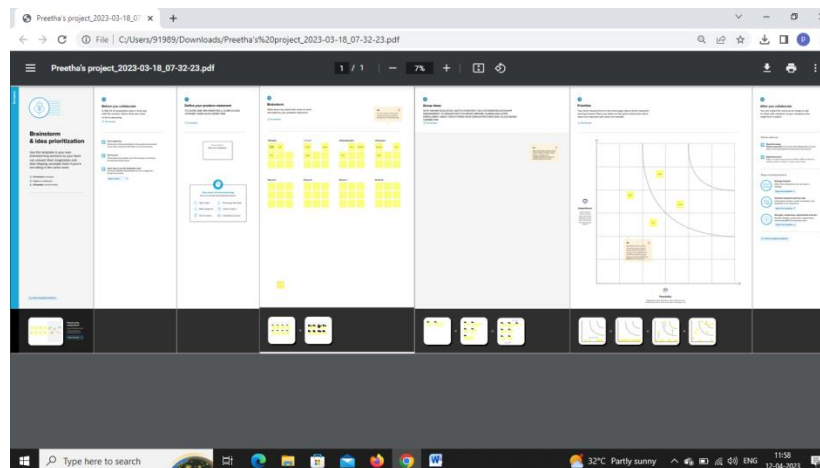
One of the most beneficial reasons to use CRM in education industry is that it improves communication between different departments within an educational institution, helping to increase efficiency and collaboration.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



3 RESULT

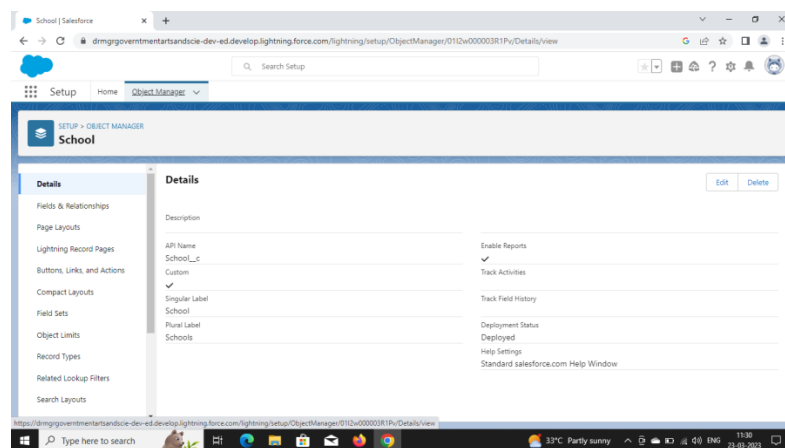
3.1 DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT		
Object 1	Field Label	Data Type	
	School	Text Area	
Object 2	Field Label	Data Type	
	Student	Master Detail	
Object 3	Field Label	Data Type	
	Parent	Text Area	

3.2 ACTIVITY & SCREENSHOT

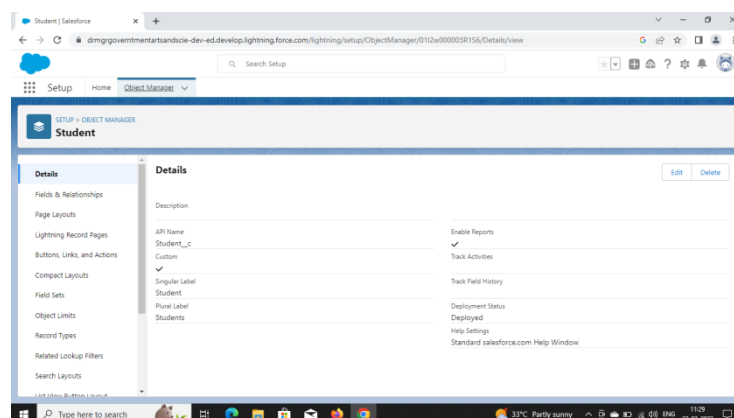
MILESTONE – 2

ACTIVITY 1



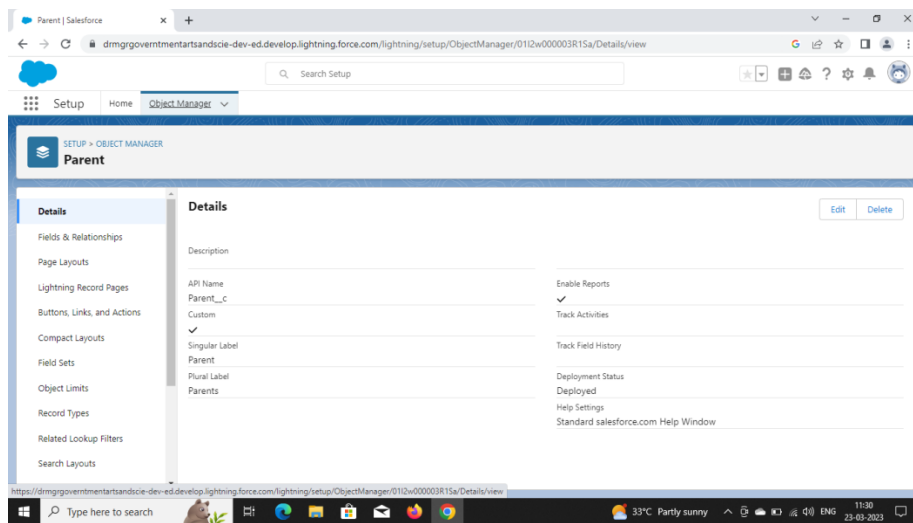
Creation of object for school management

ACTIVITY 2



Creation of objects for student

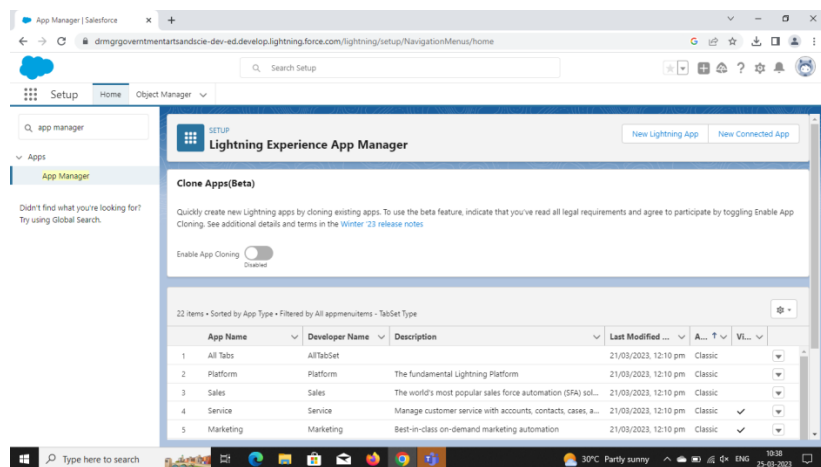
ACTIVITY 3



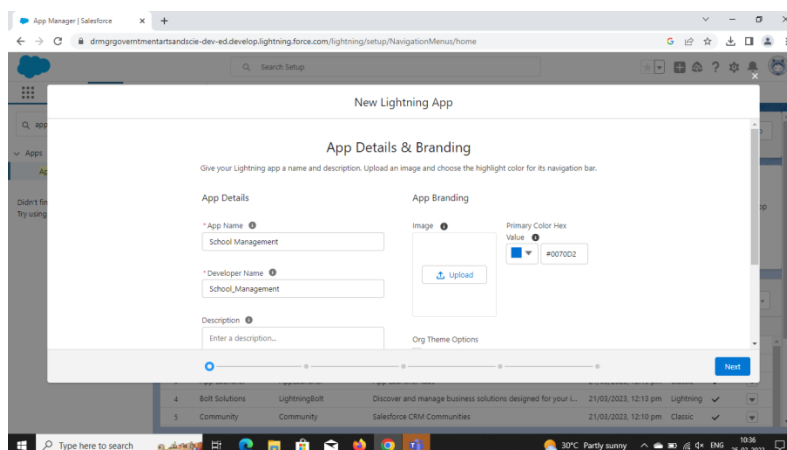
Creation of object for parents

MILESTONE-3

LIGHTNING APP



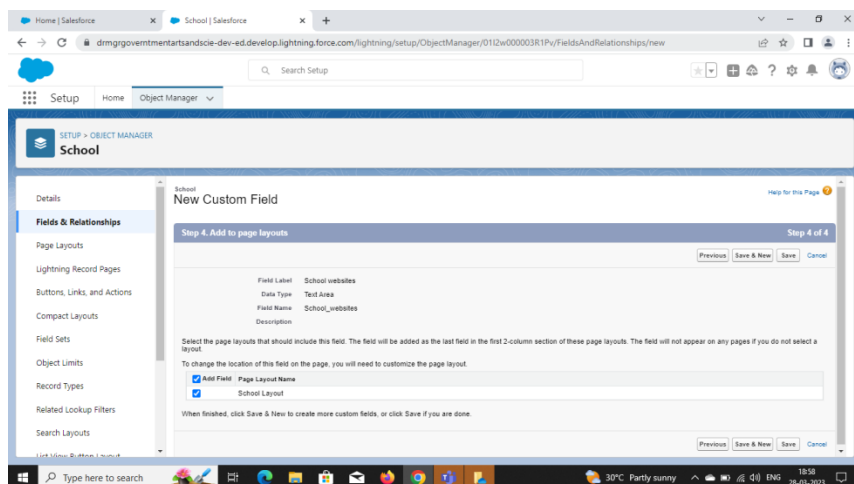
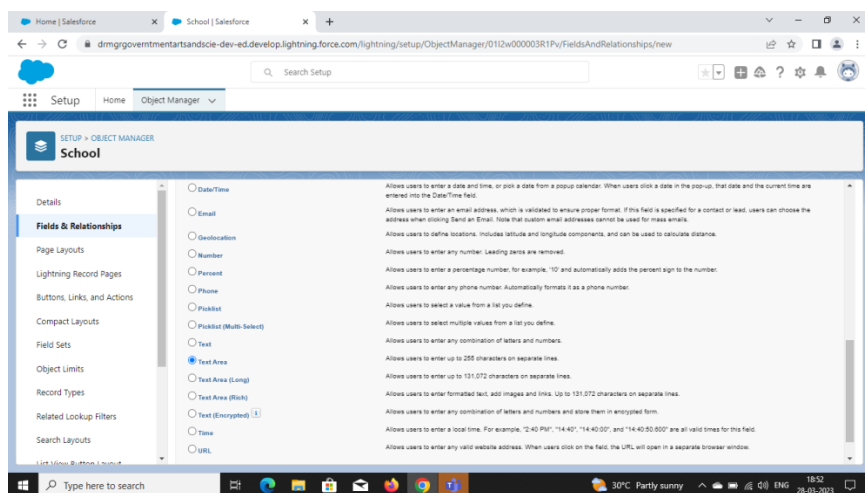
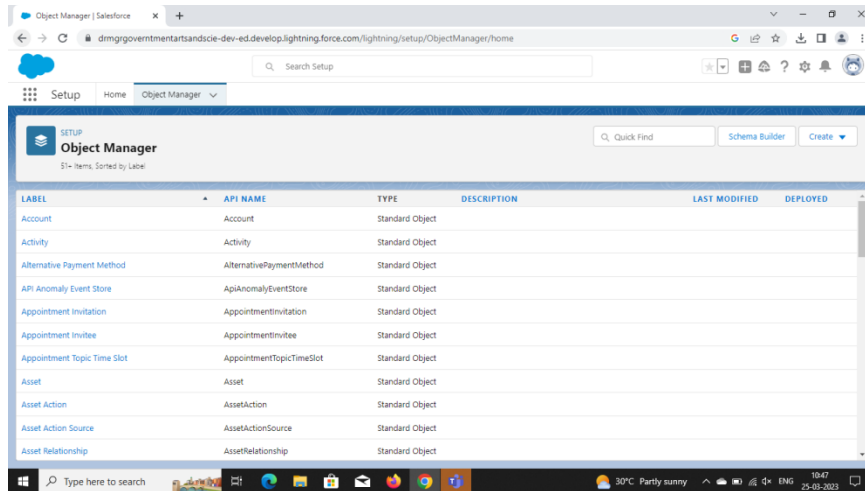
Creating the school management app



MILLESTONE -4

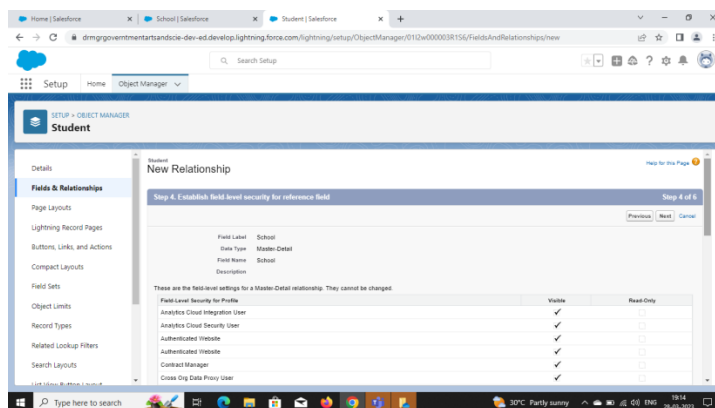
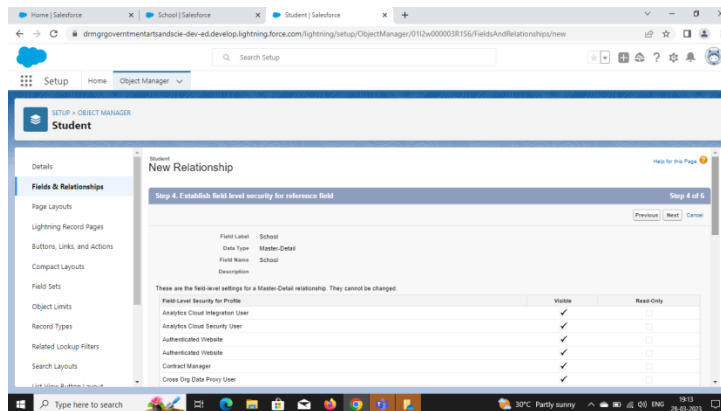
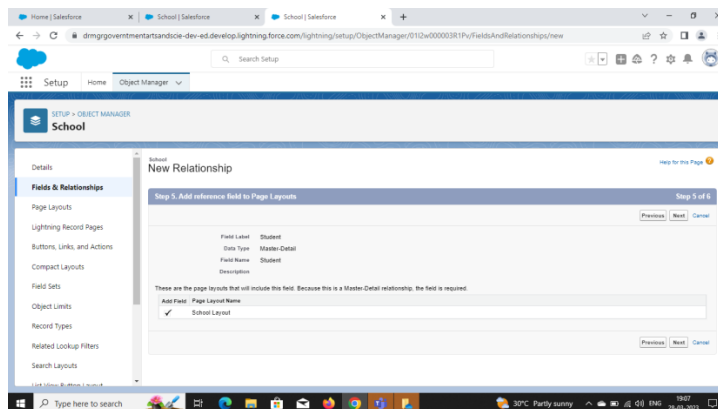
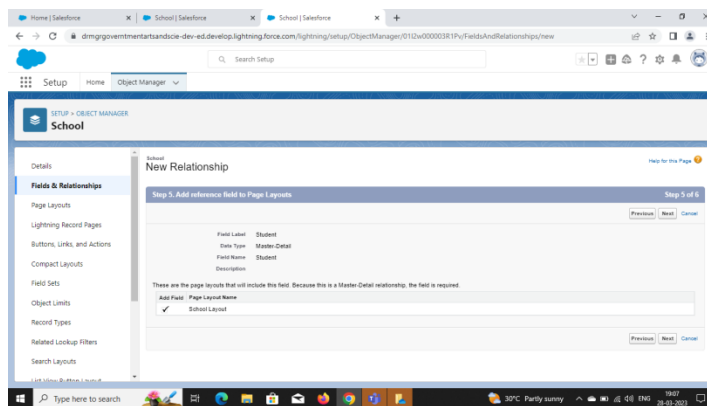
FIELDS AND RELATIONSHIP

ACTIVITY-1



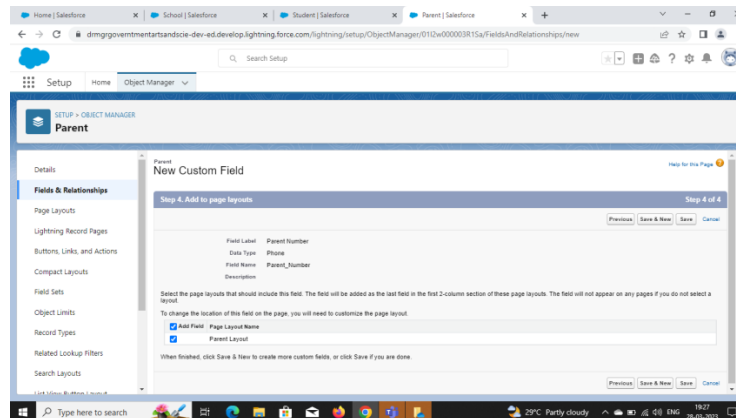
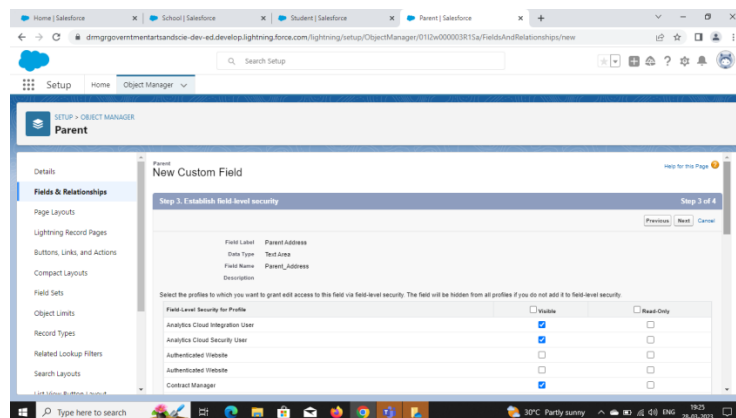
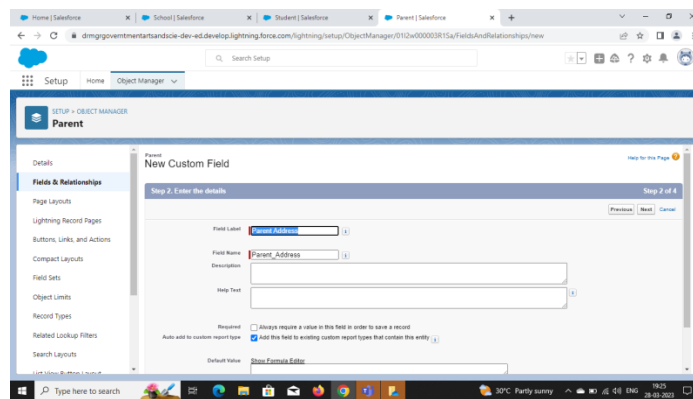
Creation of fields for the school objects

ACTIVITY-2



Creation of fields for the student object

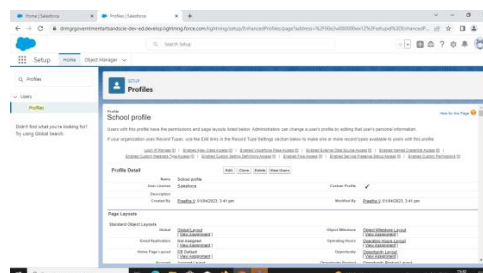
ACTIVITY-3

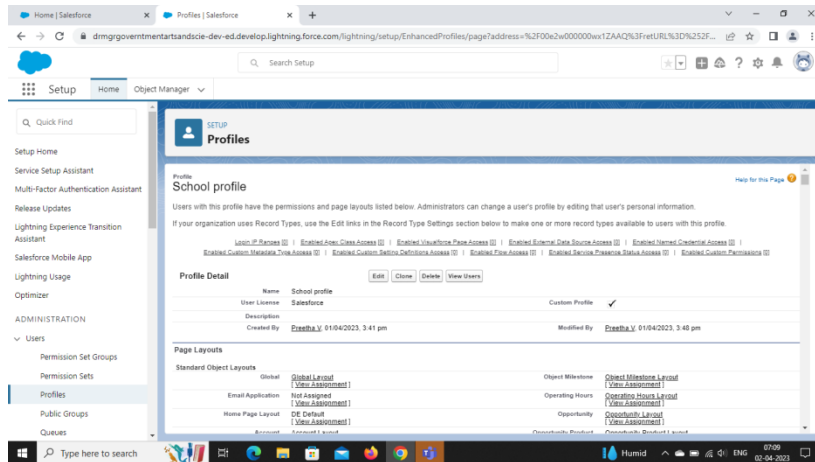
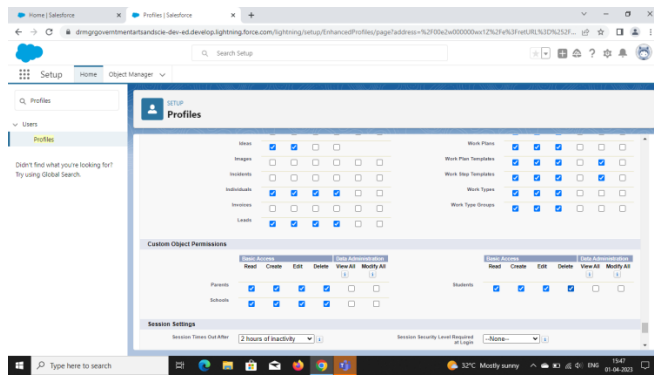


Creation of fields for the parent object

MILLESTONE-5

PROFILE

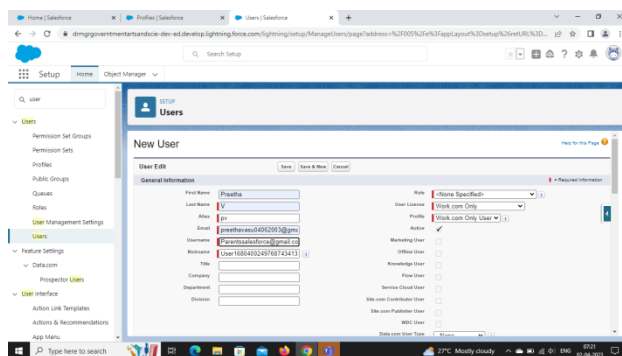
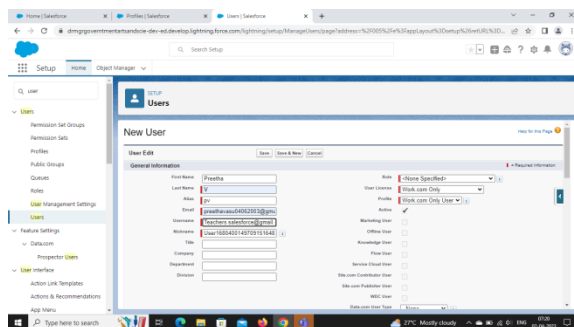


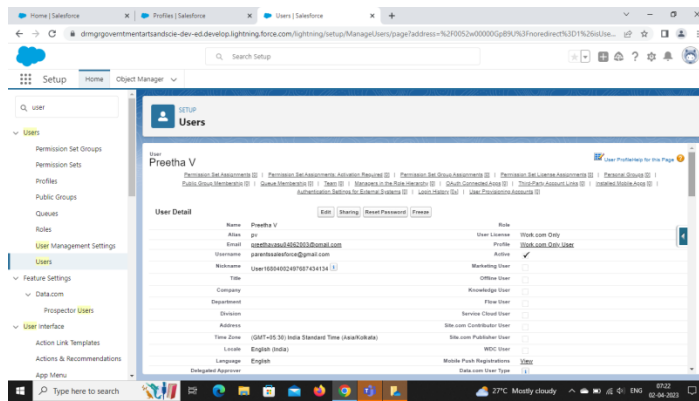


Creating a profile

MILLESTONE -6

USER



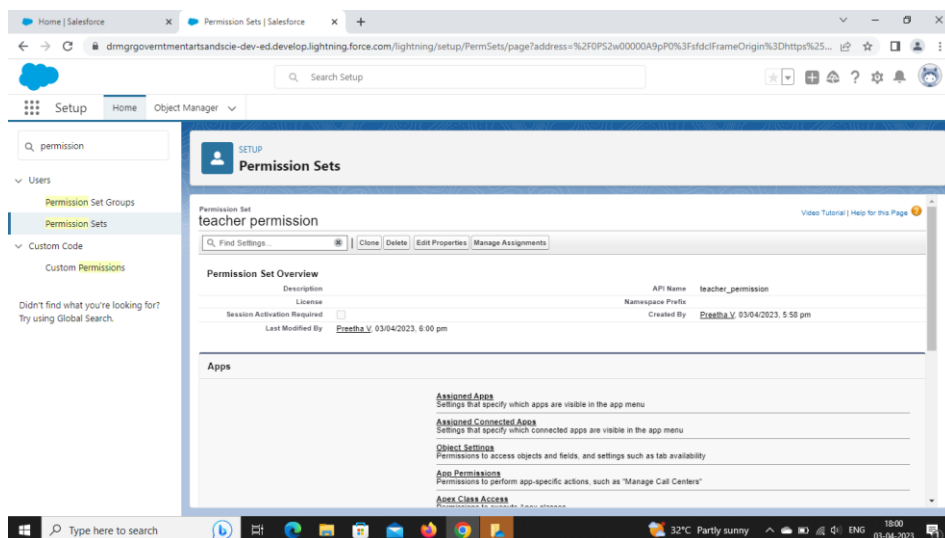
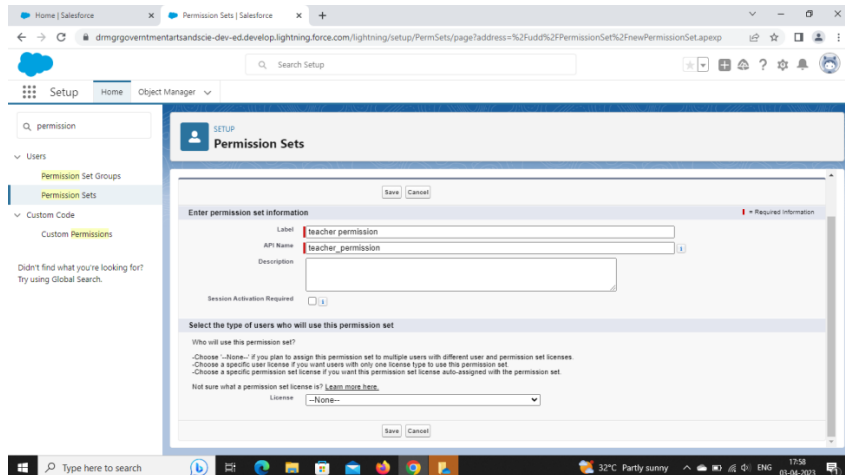


Creating a users for teachers and parents

MILESTONE-7

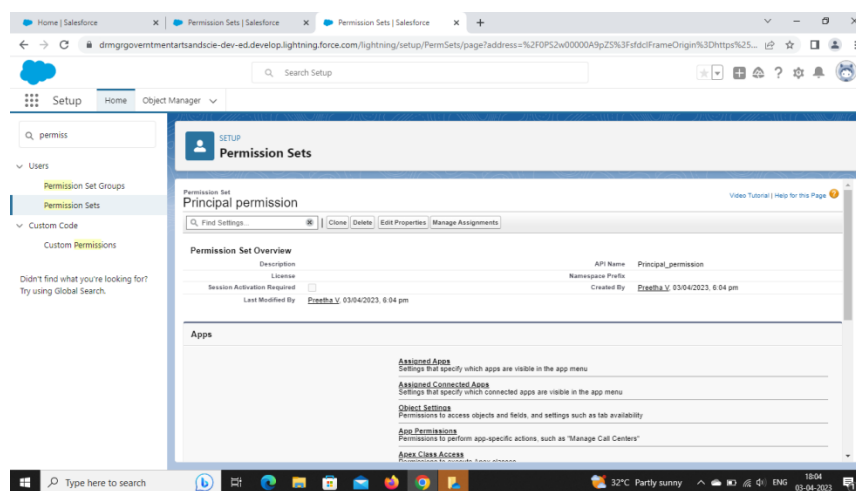
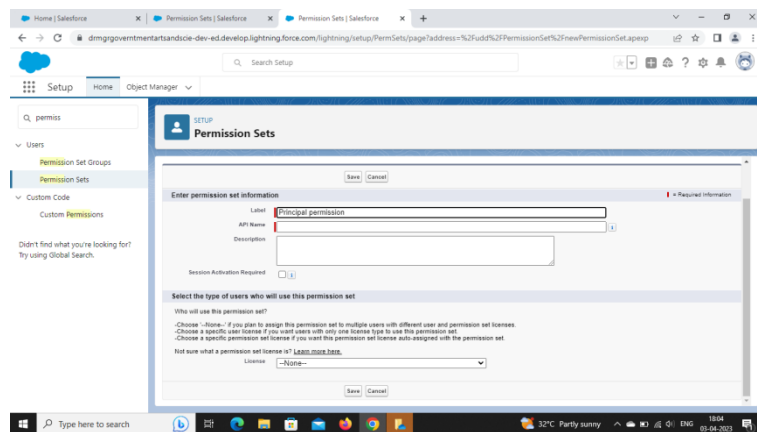
PERMISSION SETS

ACTIVITY 1



Creation of permission set for teacher

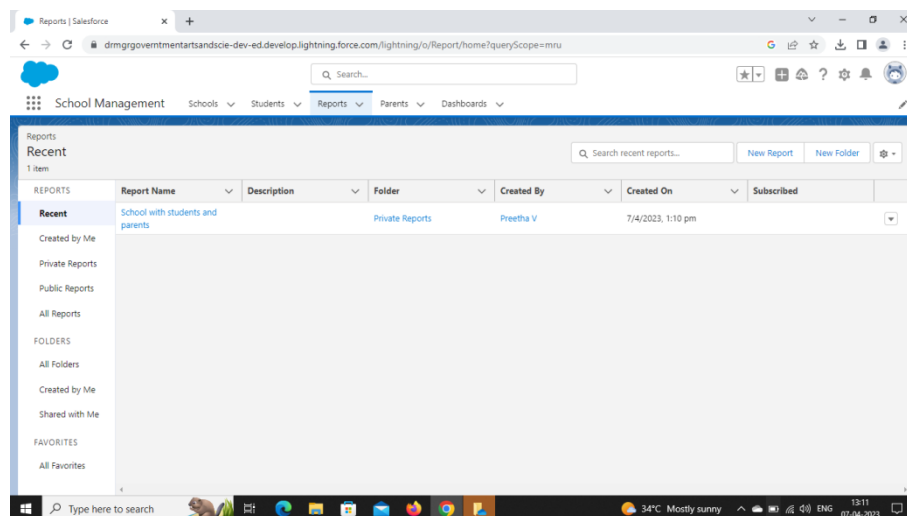
ACTIVITY-2

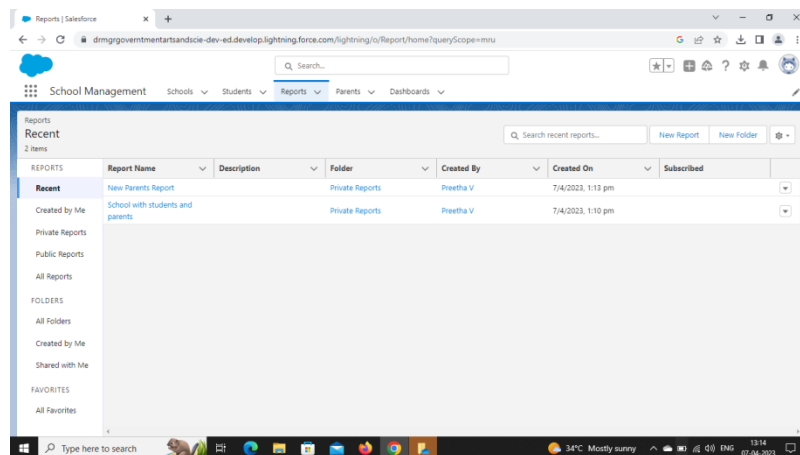
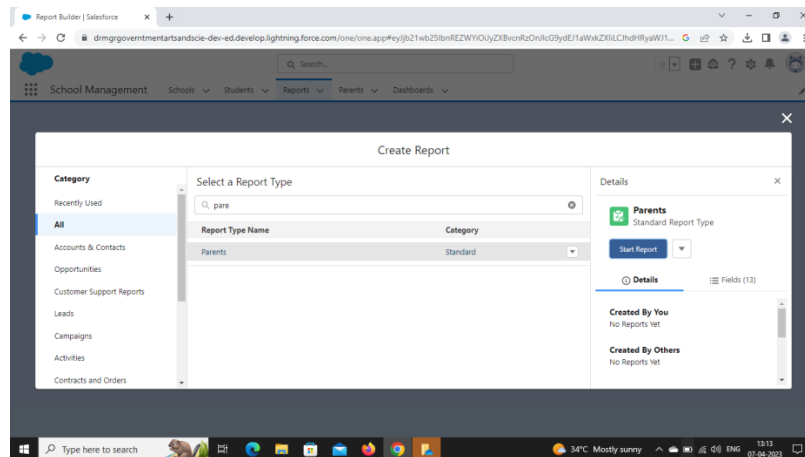


Creation of permission set for Principal

MILESTONE-8

REPORTS





Creating a report

4 TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER - <https://trailblazer.me/id/pvasudevan17>

TEAM MEMBER 1 - <https://trailblazer.me/id/plakshminarayanan5>

TEAM MEMBER 2 - <https://trailblazer.me/id/praveena31>

TEAM MEMBER 3 - <https://trailblazer.me/id/pveerakumar>

5 ADVANTAGES & DISADVANTAGES

ADVANTAGES

Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management , automated communication, data driven decision making ,student engagement, revenue, better communication , easy tracking of student performance and attendance, alumni engagement and many more.

Some of the advantages are:

- Track student life cycles within the institutions.
- Improve the students admissions lifecycle.
- Keep alumni information safe and accessible.
- Stay connected with teams.
- Monitor fee payments and remainders.
- Track and gain insight on organization wide data and processes.
- Reduce operational costs.

DISADVANTAGES

One of the CRM drawback is the lack of time and resources to plan a quality strategy and ensure a smooth transition to new software .The implementation of a CRM system requires considerable time. The cost of implementation and support of the system can scare away potential buyers.

- Lack of communication wide use .
- Lack of communication.
- Lack of technology integration.
- One of the greatest challenges to CRM implementation is cost.

6 APPLICATIONS

- Form integration to capture all lead details in the system.
- Publisher integration to have access to all publisher leads in the CRM.
- Marketing automation to fast track lead nurturing.
- Score dashboard across leads with sentiments.
- Notifications to prioritise recommended actions.
- A single view dashboard to have an overview of your overall marketing efforts.
- Counselor performance dashboard to measure team performance.
- Publisher panel to analyse the attribution of leads between different publishers.
- Filter dynamically on prospects likely to convert.

7 CONCLUSION

Customer Relationship Management (CRM) is the combination of practices , strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth. CRM form the backbone of any business. Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long term customer loyalty. CRM is a technology for managing all your company's relationships and interactions with customers and potential customers. A CRM system helps companies stay connected to customers, streamline processes and improve profitability. CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases.

8 FUTURE SCOPE

A CRM system provide a 360 degree view of the customer and support operatives with information they need at their fingertips so they can resolve issues and handle queries efficiently. The future of CRM will include users who demand more functionality. They will be looking for providers that cover typical CRM essentials as well as more sophisticated automation. CRM higher education enables institutions to manage relationships with all of their customers including students, alumni, faculty, staff and corporate partners and connect insights from those interactions in a unified view. With an integrated platform for the entire education journey, institutions of all sizes can use CRM to create engaged learner relationships for life.