

Project Report Template

CRM-APPLICATION FOR SCHOOL/COLLEGES

1 INTRODUCTION

1.1 Overview

Customer relationship management (CRM) is the combination of practices, strategies

And technologies that companies use to manage and analyze customer interactions and data

Data throughout the customer lifecycle. The goal is to improve customer service relationships

And assist in customer retention and drive sales growth.

1.2 PURPOSE

Customer relationship management (CRM) is a technology for managing all your

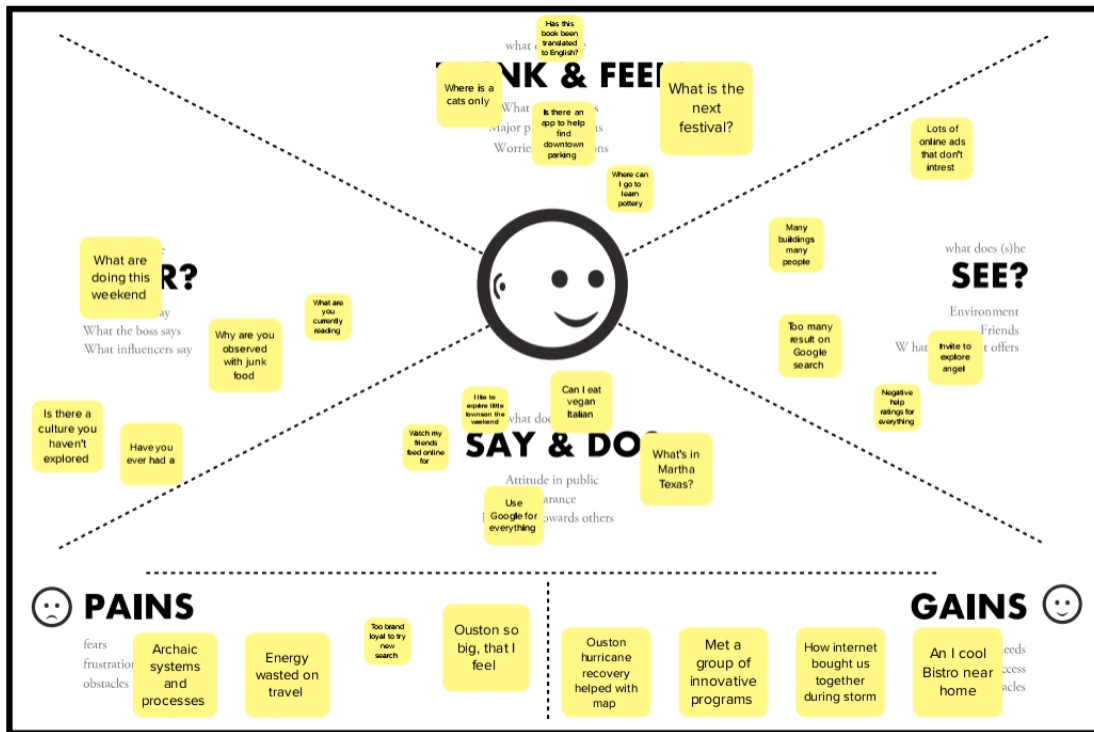
Company's relationships and interactions with customers and potential customers.

The goal is simple improve business relationships. A CRM system helps companies stay

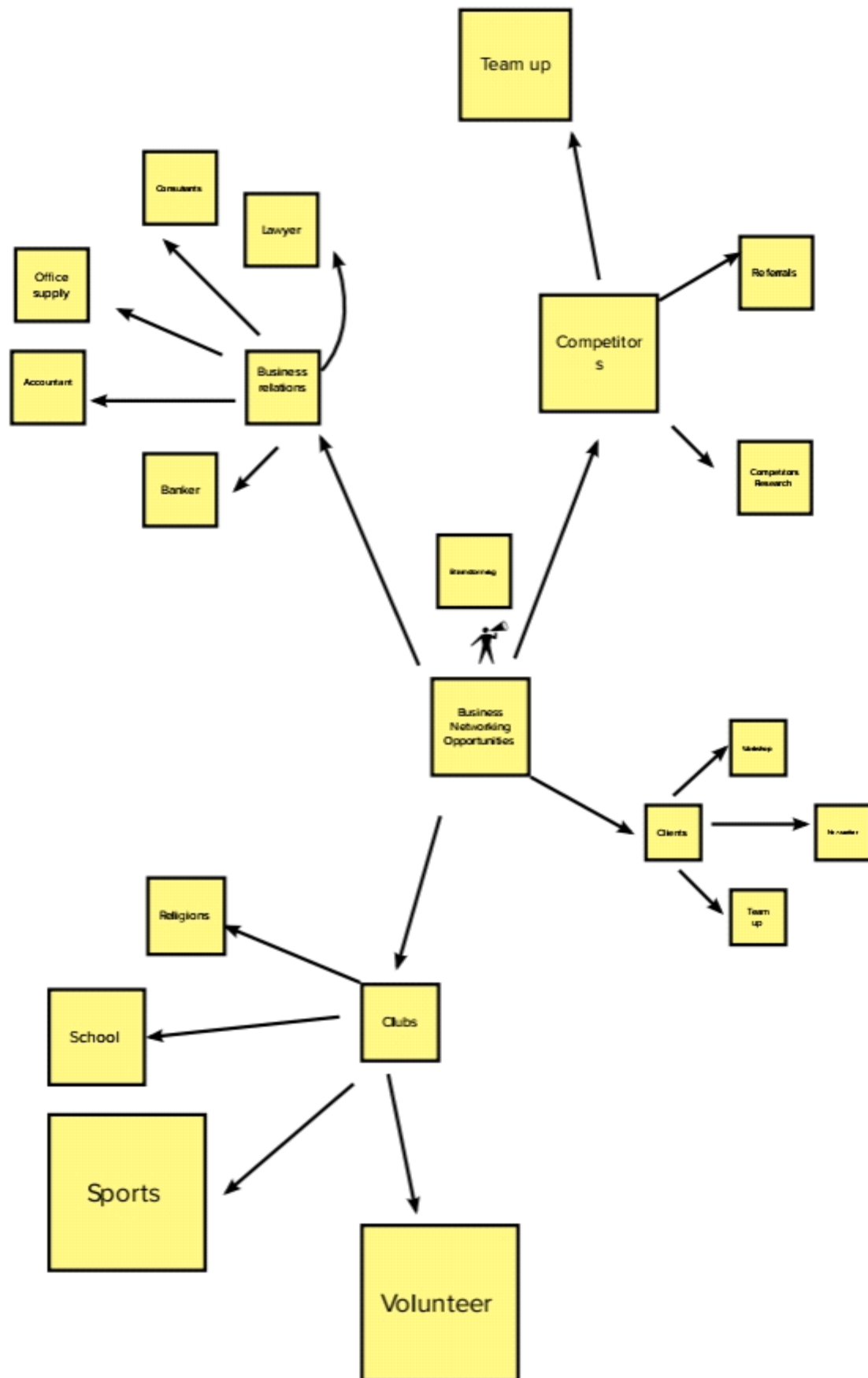
Connected to customers, streamline, processes, and improve profitability.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2. Brainstorming Map



deation & Brainstorming Map

3RESULT

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	Text Area	
	Phone Number	Phone	
	Number of Students	Roll-up summery	
	Highest Marks	Roll-up summery	

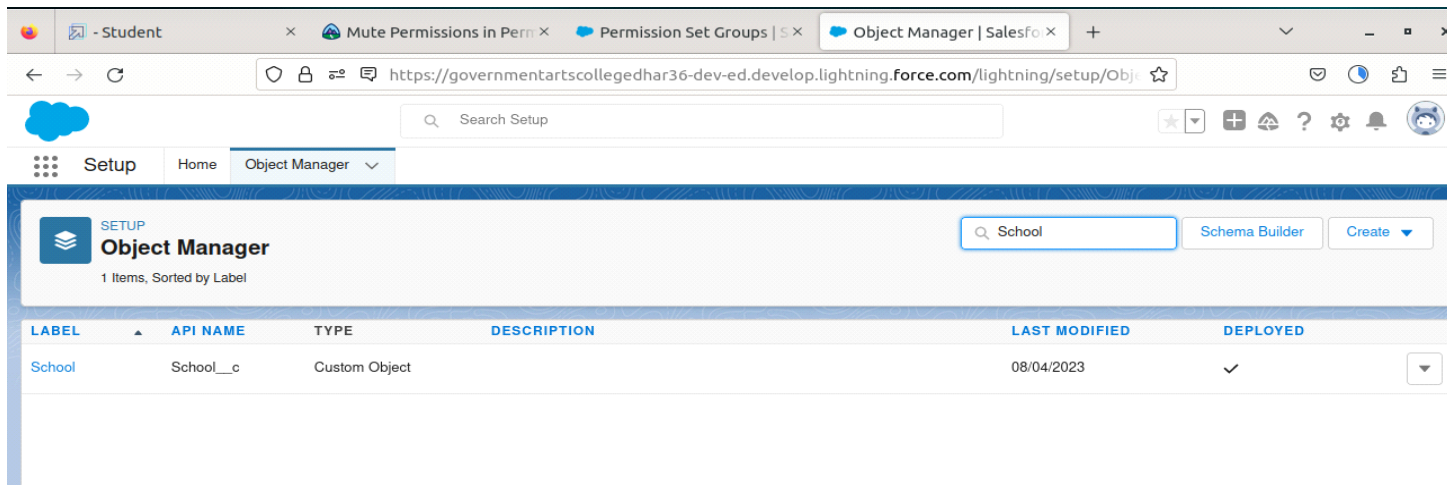
Object name	Fields in the Object	
Student	Field Label	Data Type
	Phone number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

(Milestone-2:OBJECT)

Activity-1 : Creation of School Object

Creation of Object for School Management



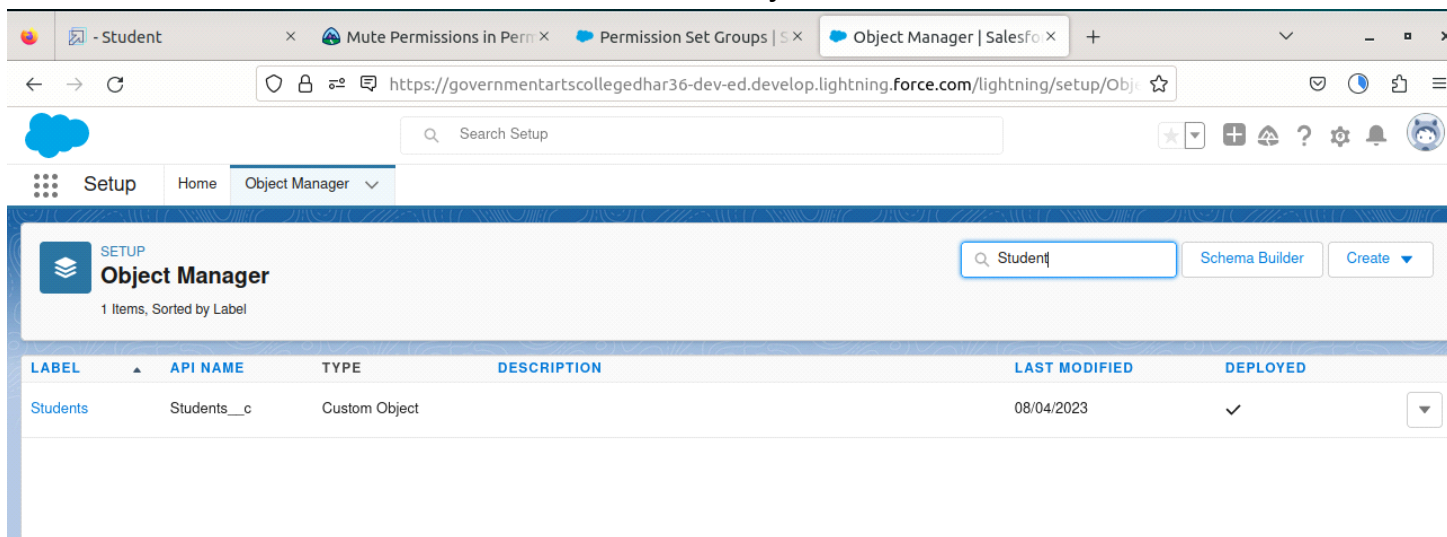
The screenshot shows the Salesforce Object Manager interface. The browser tabs include '- Student', 'Mute Permissions in Perm...', 'Permission Set Groups | S...', and 'Object Manager | Salesfo...'. The address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj>. The page header has a search bar with 'Search Setup' and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area shows the 'Object Manager' section with a search bar containing 'School' and buttons for 'Schema Builder' and 'Create'. Below this, a table lists the objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School__c	Custom Object		08/04/2023	✓

(Milestone-2:OBJECT)

Activity-2 : Create Student Object

Creation of Student Object



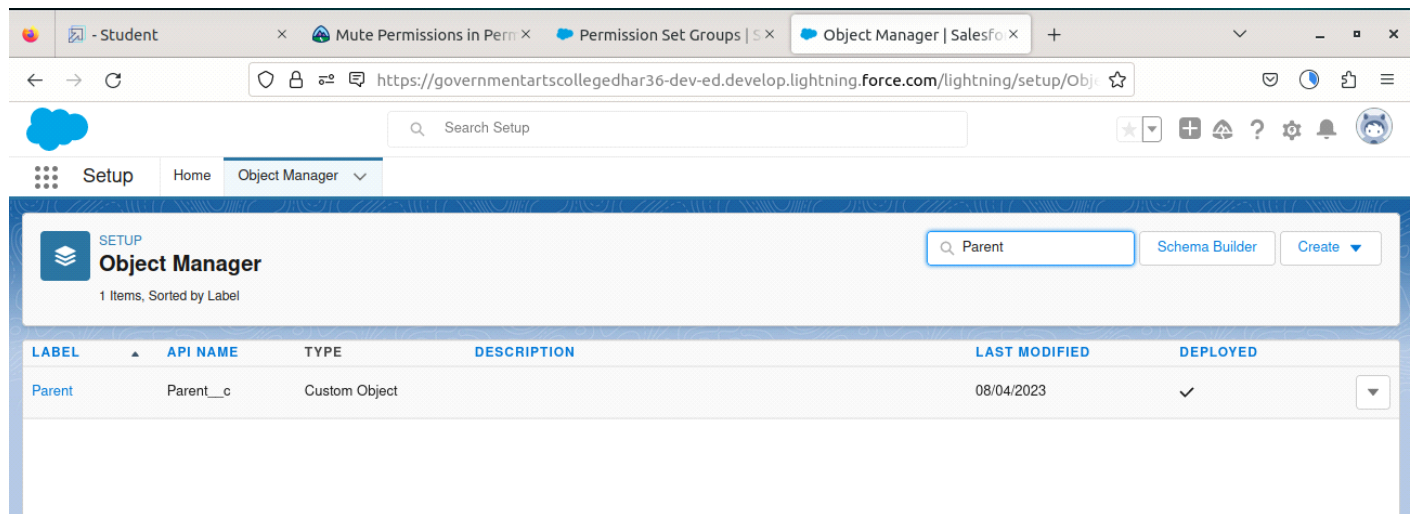
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LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Students	Students__c	Custom Object		08/04/2023	✓

(Milestone-2: OBJECT)

Activity-2 : Create Parent Object

Creation of Parent Object



The screenshot displays the Salesforce Object Manager interface in a web browser. The browser's address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj>. The page header includes the Salesforce logo, a search bar with the text "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows "1 Items, Sorted by Label". A search bar contains the text "Parent". Below this, a table lists the objects:


LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		08/04/2023	✓

(Milestone-3: LIGHTNING APP)


Activity-1 : Create the School Management App

Creation School Management App

▼ All Apps



School Management



▼ All Items

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-1 : Creation of fields for the School Objects

Creation of fields for the School Object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

School

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

List View Button Layout

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Students)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School Websites	School_Websites__c	Text Area(255)		
State	State__c	Text Area(255)		

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-2 : Creation of fields for the Student Objects

Creation of fields for the Student Object

The screenshot shows the Salesforce Setup interface for the 'Students' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields sorted by Field Label. The fields are: Class, Created By, Last Modified By, Marks, Phone Number, Results, School, and Students Name. Each field entry includes its label, name, data type, and whether it is indexed. The 'Students Name' field is the primary key, indicated by a checkmark in the 'INDEXED' column.

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)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Students Name	Name	Text(80)		✓

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-3 : Creation of fields for the Parent Objects

Creation of fields for the Parents Object

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 6 items, sorted by Field Label. The table below lists the fields:

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	Number(18, 0)		

At the bottom of the page, the URL is visible: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XmBm/FieldsAndRelationships/CreatedBy/view>

(Milestone-5: PROFILE)

Activity-1 : Creation on Profile

Creation on Profiles

Student

Mute Permissions in Perm

Permission Set Groups | S

Profiles | Salesforce

https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Enh

Search Setup

SetupHomeObject Manager

profile

UsersProfiles

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

SETUP

Profiles

Profiles

Help for this Page

All ProfilesEdit | Delete | Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	School Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 70 Selected

Page 1 of 1

(Milestone-6: USERS)

Activity-1 : Creating a Users

Creating a Users

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a view selector (set to 'All Users'), and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. There are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' at the top and bottom of the table.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	C. SIVARANJANI	sc	sivaranjani12161@gmail.com		✓	School Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rk2gqeal.khyf2wwdkywy@chatter.salesforce.com		✓	Chatter Free User
Edit	g. narmatha	gn	narmathaphysics2003@gmail.com		✓	Standard Platform User
Edit	n. pradeep kumar	pn	pk210702@gmail.com		✓	Standard Platform User
Edit	S. RAMARAJ	RS	ramaraj0712@gmail.com		✓	System Administrator
Edit	User_Integration	integ	integration@00d2w00000rk2gqeal.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2w00000rk2gqeal.com		✓	Analytics Cloud Security User

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1:

To Set Permissions

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with "Users" and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, and Data.com. The main content area is titled "Permission Sets" and includes a "SETUP" icon. Below the title, there is a description of the page and a link to download the SalesforceA mobile app. A table titled "All Permission Sets" is displayed, showing a list of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The first row shows a permission set labeled "teacher_permission" with a "Del | Clone" action.

Action	Permission Set Label	Description	License
Del Clone	teacher_permission		

(Milestone-7: PERMISSION SETS)

Activity-2 : Permission sets 2:

To Set Permissions

This screenshot is similar to the first one, showing the Salesforce Setup interface for Permission Sets. The left sidebar is the same. The main content area is titled "Permission Sets". The table "All Permission Sets" now shows a different permission set: "Principal_permission" with a "Del | Clone" action.

Action	Permission Set Label	Description	License
Del Clone	Principal_permission		

(Milestone-8: REPORTS)

Activity-1 : Reports

Reports

Reports

Recent

4 items

Q Search recent reports...

New Report New Folder

REPORTS	R...	Description	Folder	Created By	C	Subscribed
Recent						
Created by Me	SUDEN TS	Private Reports	RAMARAJ S	9/4/2023, 9:25 pm	✓	
Private Reports	New Schools Report	RAM	RAMARAJ S	8/4/2023, 5:53 pm	✓	
Public Reports						
All Reports						
FOLDERS	PAREN TS	Private Reports	RAMARAJ S	9/4/2023, 9:23 pm	✓	
All Folders						
Created by Me	New Accounts Report	Private Reports	RAMARAJ S	17/3/2023, 9:40 pm	✓	
Shared with Me						
FAVORITES						
All Favorites						

Transferring data from governmentartscollegedhar36-dev-ed.develop.lightning.force.com...

4Trailhead Profile Public URL

Team Lead - <http://trailblazer.me/id/venika7531>

Team Member 1 - <https://trailblazer.me/id/saktc5>

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

Team Member 3 - <https://trailblazer.me/id/a141>

5 ADVANTAGES & DISADVANTAGE

Advantages

Facilitates discovery of new customers

CRM systems are useful in identifying potential customers. They keep track of the profiles of the existing clientele and can use them to determine the people to target for maximum clientage returns.

New customers are an indication of future growth. However, a growing business utilizing CRM software should encounter a higher number of existing customers versus new prospects each week. Growth is only essential if the existing customers are maintained appropriately even with recruitment of new prospects.

Increases customer revenues

CRM data ensures effective co-ordination of marketing campaigns. It is possible to filter the data and ensure the promotions do not target those who have already purchased particular products. Businesses can also use the data to introduce loyalty programs that facilitate a higher customer retention ratio. No business enjoys selling a similar product to a customer who has just bought it recently. A CRM system coordinates customer data and ensures such conflicts do not arise.

Helps the sales team in closing deals faster

A CRM system helps in closing faster deals by facilitating quicker and more efficient responses to customer leads and information. Customers get more convinced to turn their inquiries into purchases once they are responded to promptly. Organizations that have successfully implemented a CRM system have observed a drastic decrease in turnaround time.

Enhances effective cross and up selling of products

Cross – selling involves offering complimentary products to customers based on their previous purchases. On the other hand, up – selling involves offering premium products to customers in the same category. With a CRM system, both cross and up – selling can be made possible within a few minutes of cross – checking available data.

Apart from facilitating quicker offers to customers, the two forms of selling helps staff in gaining a better understanding of their customer's needs. With time, they can always anticipate related purchases from their customer.

Simplifies the sales and marketing processes

A CRM system facilitates development of better and effective communication channels. Technological integrations like websites and interactive voice response systems can make work easier for the sales representatives as well as the organization. Consequently, businesses with a CRM have a chance to provide their customers with various ways of communication. Such strategies ensure appropriate delivery of communication and quick response to inquiries and feedback from customers.

Makes call centers more efficient

Targeting clients with CRM software is much easier since employees have access to order histories and customer details. The software helps the organization's workforce to know how to deal with each customer depending upon their recorded archives. Information from the software can be instantly accessed from any point within the organization.

CRM also increases the time the sales personnel spend with their existing customers each day. This benefit can be measured by determining the number of service calls made each day by the sales personnel. Alternatively, it could also be measured through the face – to – face contact made by the sales personnel with their existing customers.

Enhances customer loyalty

CRM software is useful in measuring customer loyalty in a less costly manner. In most cases, loyal customers become professional recommendations of the business and the services offered. Consequently, the business can promote their services to new prospects based on testimonials from loyal customers. Testimonials are often convincing more than presenting theoretical frameworks to your future prospects. With CRM, it could be difficult pulling out your loyal customers and making them feel appreciated for their esteemed support.

Disadvantages

1. A costly project

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

2. Loss of collected information or records

CRM (customer relationship management) tools can be responsible for losing the customer's information as some CRM software keeps track of customers' information using remote internet connections. Due to this, sometimes organization needs to have control over the customer's information (detailed), especially when a system failure event happens. An unstable CRM can result in the loss of money in revenue for the company in the future.

3. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

4. It eliminates the human element.

CRM is a fully automated tool that has prevented human intervention. It automatically collects all the data and processes it. CRM efficiently manages the relationship between the company and customers as it directly interacts between people and its staff. Customers can shift anywhere due to the loss of human touch, reducing sales and revenue.

5. Can be accessed by the third party

As we know, CRM collects customers' sensitive information and stores it, which other parties can misuse. For example, web hosting companies take and sell collected data to a third party that misuses the data and causes loss to people.

6. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

6 APPLICATIONS

Applications of a CRM – Examples and Strategies

- * Application 1: Tracking Customers
- * Application 2: Collecting Data for Marketing
- * Application 3: Improving Interactions and Communications
- * Application 4: Streamlining Internal Sales Processes
- * Application 5: Planning Your Operations.

7 CONCLUSION

Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BMW has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has greatly diversified its customer roots to various market bases. Mercedes has majored in a customer-dealership business relationship. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in the automotive

8 FUTURE SCOPE

The future has arrived — at least it has in the world of customer relationship management or CRM software, one of the fastest growing categories of enterprise software. We are entering the era of intelligent, integrated CRM, and the future of CRM is even brighter. From small businesses to global enterprises, sales and marketing teams are adopting CRM to deliver better customer experiences, acquire and retain customers, and gain new customer-centric insights that are changing their companies for the better.

Future of CRM

What To Expect

Customer Intelligence
Is King

1

5

CRM as a
Single Source of Truth

AI, BI and Beyond

2

6

More, Deeper
Automations

APIs and Integrations

3

7

Personalization Is Key

Keeping Customers Happy
Keeps Them Coming Back

4