CRM & PPLIC & TION FOR SCHOOLS/COLLEGES

1. Introduction

1.1: OYERYIEW

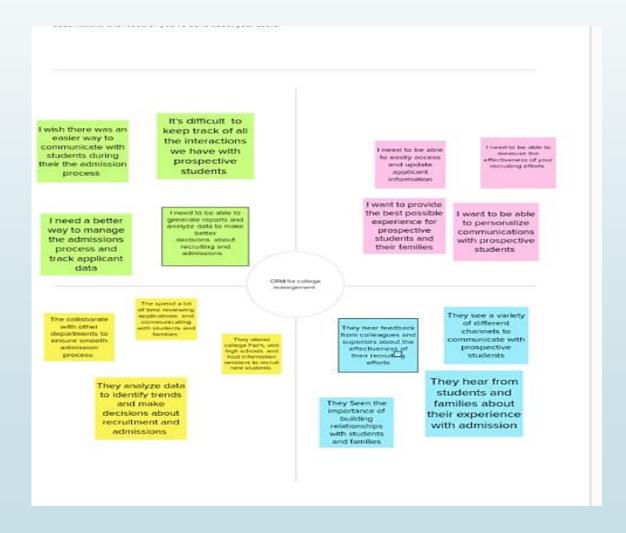
CRM (Customer Relationship Management) applications for schools/colleges are software systems designed to help educational institutions and manage relationships with their students, parents, alumni, and other stakeholders. These applications allow schools to collect and analyze data about these groups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

1.2: PURPOSE

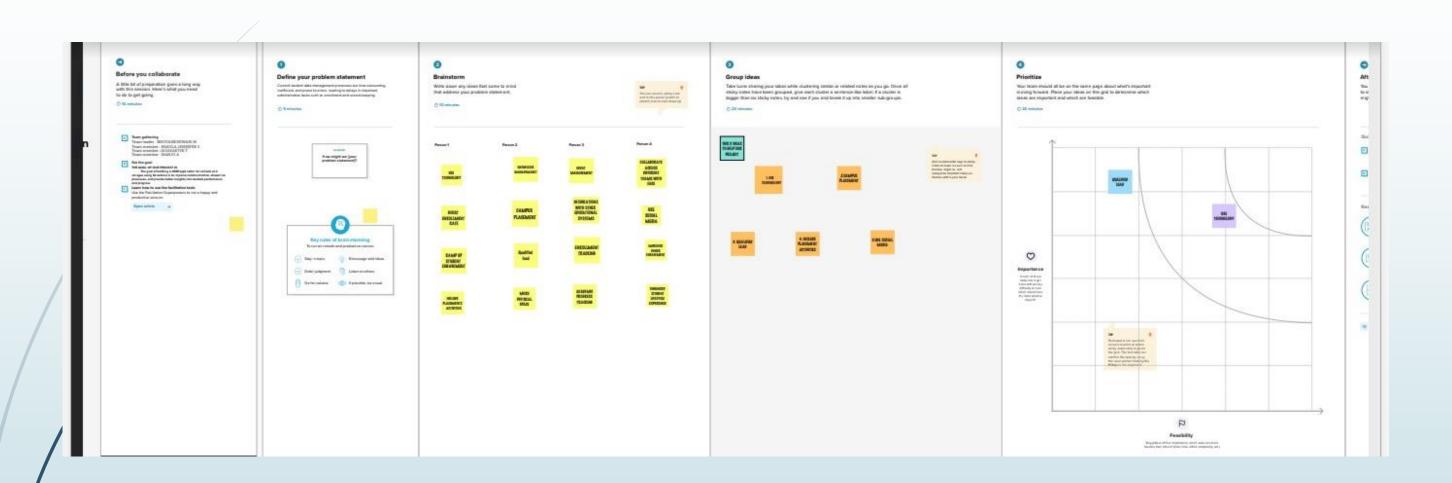
Customer Relationship Management (CRM) applications for schools/colleges serve the purpose of managing relationships and interactions with students, parents, alumni, and other stakeholders. These applications provide a comprehensive system for schools/colleges to manage and track interactions with their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

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2: BRAINSTORMING



3. RESULT

3.1: DATA MODEL

Object name	Fields of Object			
	Field Label	Data Type		
College	Address	Text Area		
	District	Text Area		
	State	Text Area		
	Phone Number	Phone		
	Number of Students	Roll-Up Summary		
	Highest Marks	Roll-Up Summary		

3.1: DATA MODEL

Object name	Fields of Object			
	Field Label	Data Type		
Student	Phone Number	Phone		
	College	Master-Detail Relationship		
	Results	Pick List		
	Class	Number		
	Marks	Number		

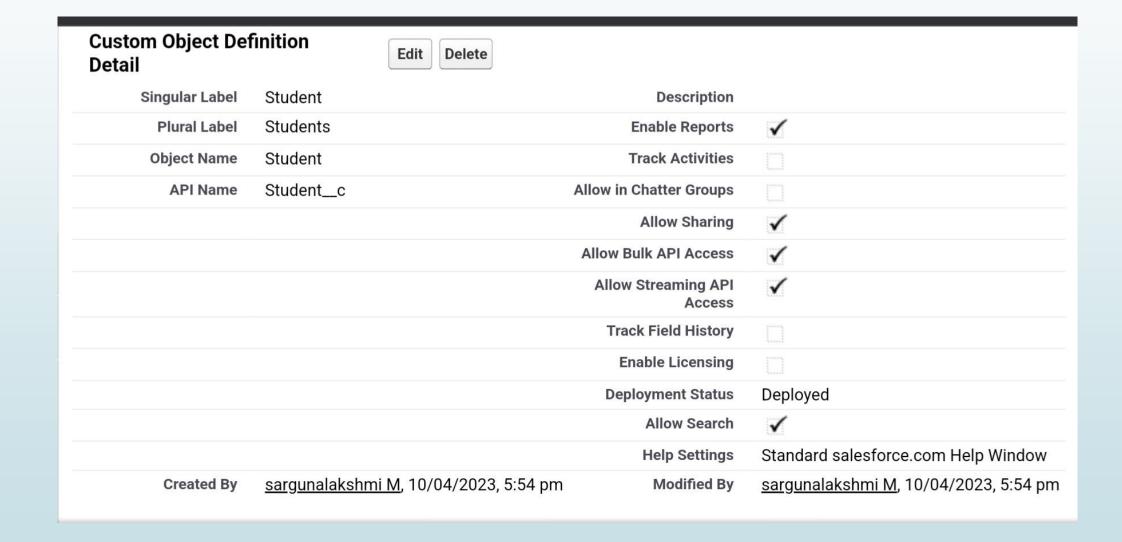
3.1: DATA MODEL

Object name	Fields of Object			
	Field Label	Data Type		
Parents	Parent Address	Text Area		
	Parent Phone Number	Phone		

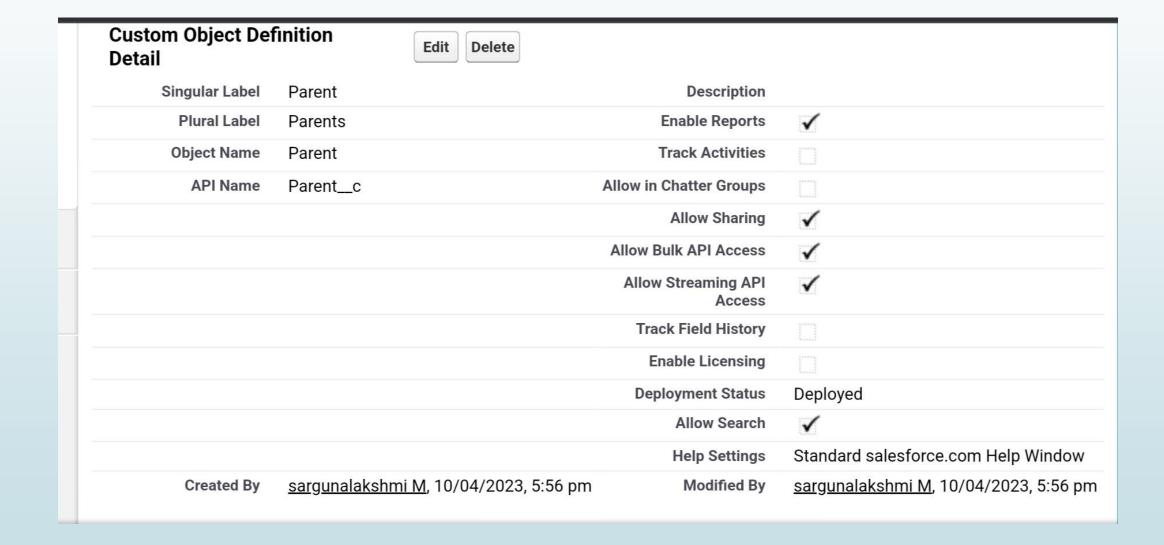
3.2: Activity & Screenshot ACTIVITY 1-OBJECT CREATION College:

Custom Object Def Detail	finition	Edit Delete		
Singular Label	College		Description	
Plural Label	Colleges		Enable Reports	✓
Object Name	College		Track Activities	
API Name	Collegec		Allow in Chatter Groups	
			Allow Sharing	✓
			Allow Bulk API Access	✓
			Allow Streaming API Access	✓
			Track Field History	
			Enable Licensing	
			Deployment Status	Deployed
			Allow Search	✓
			Help Settings	Standard salesforce.com Help Window
Created By	<u>sargunalakshmi</u>	<u>M</u> , 10/04/2023, 5:49 pm	Modified By	sargunalakshmi M, 10/04/2023, 6:47 pm

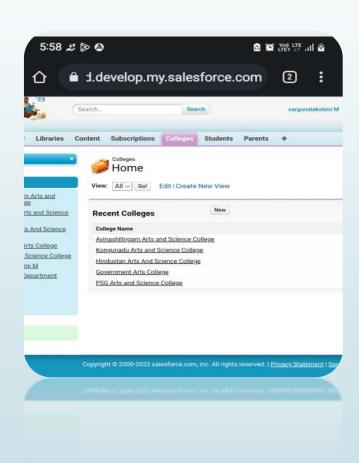
STUDENT:



PARENT:



ACTIVITY 2: LIGHTING APP:



ACTIVITY 3: FIELDS AND RELATIONSHIP FOR COLLEGE OBJECT:

ustom F	Custom Fie	Fields & Relationships Help 🤇			
Action	Field Label	API Name	Data Type	Indexed Controlling Field	Modified By
Edit Del	Address	Address_c	Text Area(255)		<u>sargunalakshmi M</u> , 10/04/2023, 6:15 pm
Edit Del	<u>College</u>	College_c	Text Area(255)		<u>sargunalakshmi M</u> , 10/04/2023, 6:17 pm
Edit Del	District	District_c	Text Area(255)		<u>sargunalakshmi M</u> , 10/04/2023, 6:16 pm
Edit Del	<u>Highest Marks</u>	Highest_Marksc	Roll-Up Summary (MAX Student)		<u>sargunalakshmi M</u> , 10/04/2023, 6:54 pm
Edit Del	Number Of Students	Number_Of_Studentsc	Roll-Up Summary (COUNT Student)		<u>sargunalakshmi M</u> , 10/04/2023, 6:53 pm
Edit Del	Phone Number	Phone_Numberc	Phone		<u>sargunalakshmi M</u> , 10/04/2023, 6:21 pm
Edit Del	<u>State</u>	State_c	Text Area(255)		<u>sargunalakshmi M</u> , 10/04/2023, 6:16 pm
	<u>Deleted Fields (2)</u>				

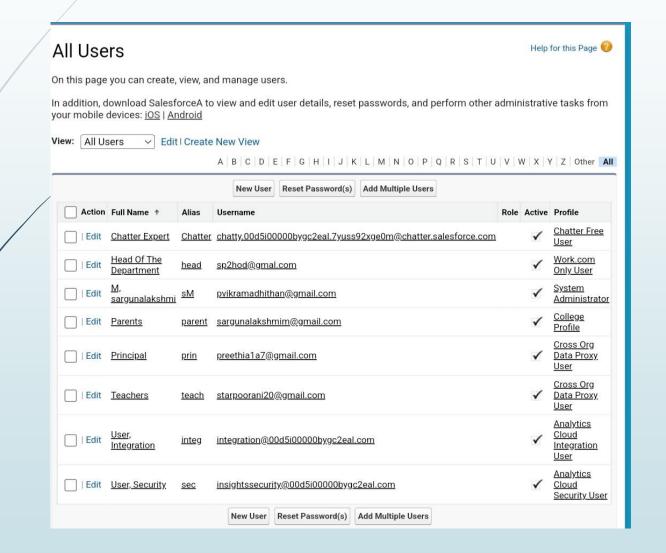
FIELDS AND RELATIONSHIPS FOR STUDENT OBJECT:

ustom Fields & R	Relationships	New Field	Dependencies		Custom	Fields & Relationships Help
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit Del	<u>Class</u>	Classc	Number(18, 0)			sargunalakshmi M, 10/04/2023, 6:52 pm
Edit Del	<u>College</u>	Collegec	Master- Detail(College)	✓		sargunalakshmi M, 10/04/2023, 6:49 pm
Edit Del	<u>Marks</u>	Marksc	Number(18, 0)			sargunalakshmi M, 10/04/2023, 6:52 pm
Edit Del	<u>Phone</u> <u>Number</u>	Phone_Numberc	c Phone			sargunalakshmi M, 10/04/2023, 6:48 pm
Edit Del Replace	<u>Results</u>	Results_c	Picklist			sargunalakshmi M, 10/04/2023, 6:51 pm

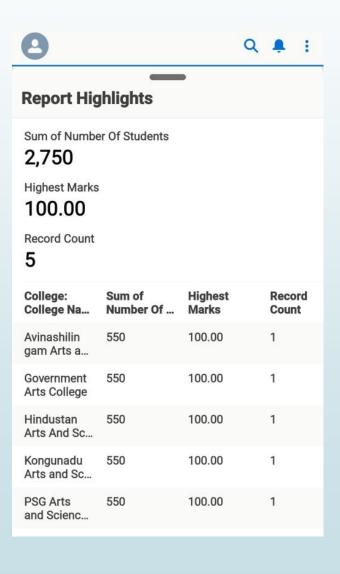
FIELDS AND RELATIONSHIP FOR PARENT OBJECT

Custom Fields & Relationsh			nips New Field Dependencies		Custom Fields & Relationships Help ?		
	Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
	Edit Del	Parent Address	Parent_Addressc	Text Area(255)			sargunalakshmi M, 10/04/2023, 6:56 pm
	Edit Del	<u>Parent Phone</u> <u>Number</u>	Parent_Phone_Numberc	Phone			<u>sargunalakshmi M</u> , 14/04/2023, 3:45 pm

ACTIVITY 4: USER:



ACTIVITY 5: REPORTS:



4. Trailhead Profile Public URL

■Sargunalakshmi (Team Lead)

https://trailblazer.me/id/sargm

PPoorani

https://trailblazer.me/id/spooranis

PPreethi

https://trailblazer.me/id/preethia

4. ADVANTAGES and DISADVANTAGES

4.1: Advantages

- Improved efficiency: A CRM application for schools and colleges can help streamline the admissions process, automate workflows, and provide real-time data and insights, resulting in improved efficiency and reduced workload for admissions officers.
- Personalization: With a centralized database of applicant information and integrated communication channels, admissions officers can provide a personalized experience for prospective students, enhancing their engagement and satisfaction.
- Data-driven decision-making: Robust data analytics and reporting tools can provide insights into recruitment efforts and enable admissions officers to make data-driven decisions to optimize their strategies.
- ► Collaboration: Collaborative tools and a centralized platform can facilitate communication and collaboration among admissions officers and other departments, resulting in improved coordination and teamwork.
- Mobile accessibility: A mobile application can provide applicants and admissions officers with anytime, anywhere access to the CRM platform, improving accessibility and convenience.

4.2: Disadvantages

- High cost: Implementing a CRM application can be expensive, especially for smaller schools or colleges, and ongoing maintenance costs can add up over time.
- Resistance to change: Admissions officers and other staff members may be resistant to change, especially if they are accustomed to using traditional methods for recruitment and admissions.
- **■** Data security: A centralized database of applicant information must be secure and protected from cyber threats and breaches.

5. APPLICATIONS

- Admissions and recruitment: A CRM application can be used to manage the entire admissions process, from initial inquiry to enrollment, including applicant tracking, communication management, and data analysis.
- Student retention: A CRM application can be used to track student interactions and behavior, identify at-risk students, and implement targeted retention strategies.
- ► Fundraising and development: A CRM application can be used to manage fundraising efforts and donor relationships, including tracking donations, sending personalized communications, and analyzing data to inform fundraising strategies.
- Alumni relations: A CRM application can be used to manage alumni relations, including tracking alumni engagement, sending targeted communications, and organizing events.

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 recordkeeping. 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.