REPORT FOR A CRM APPLICATION FOR SCHOOLS AND COLLEGES

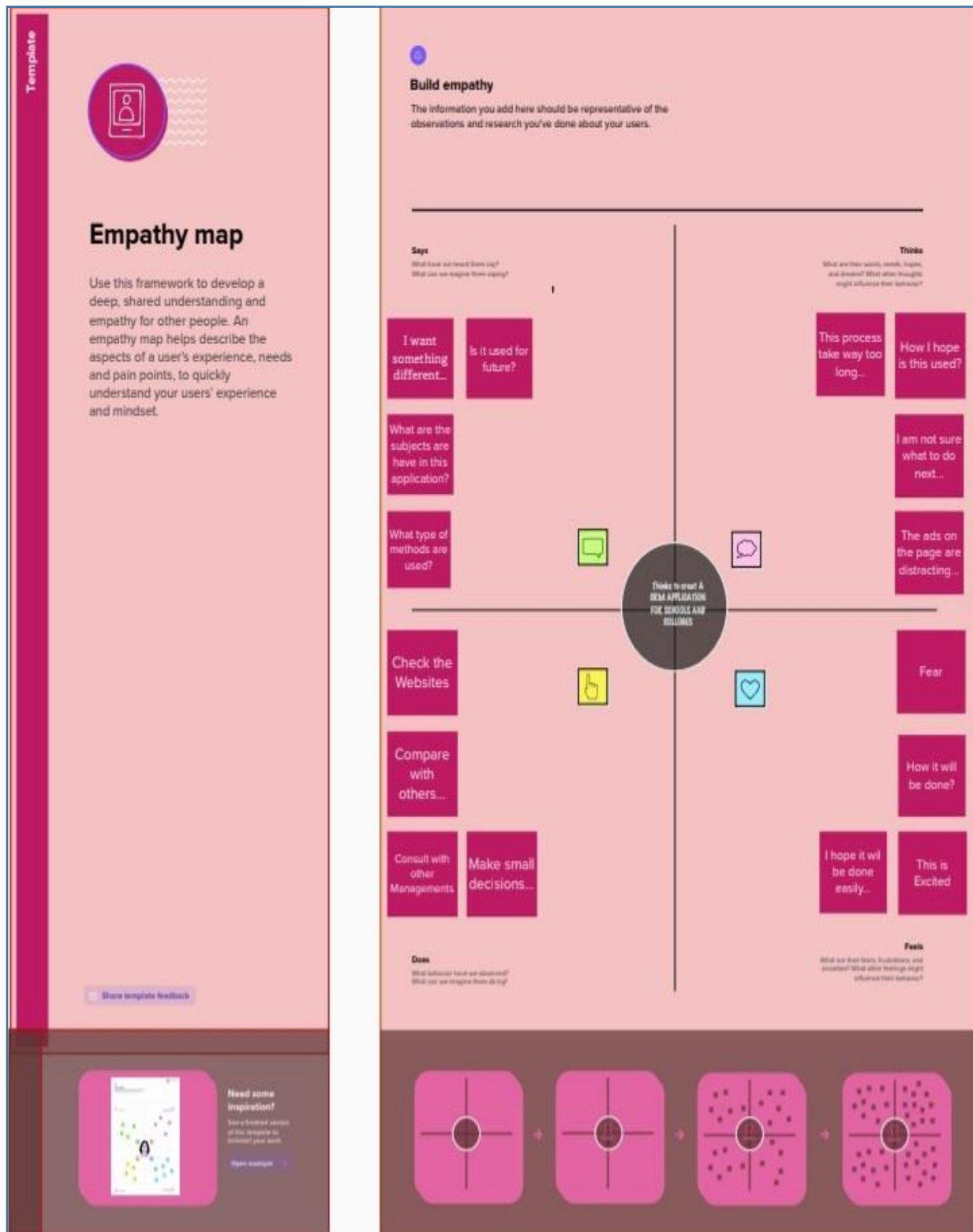## 1   INTRODUCTION

1.1 Overview

Schools use CRM systems to manage admission processes (follow-ups, open houses, grants, etc.), marketing communications, and automate admission workflows.

1.2 Purpose

Simply Increase your Conversion Rate by 200% using the Best CRM for Educational Institutes. Automation Nurturing of Applicants to Admissions helps you to increase the closure by 200% Free Setup & Training. Education Specific CRM. Zero Missed Follow-ups.

2   Problem Definition & Design Thinking

2.1 Empathy Map

2.2 Ideation & Brainstorming

3   RESULT

3.1 Data Model:

Object Name	Fields in the Object	
School object	Field label	Data type
	Address	Area
	Phone Number	Phone
Student Object	Field label	Data type
	Phone Number	Phone
	School	Master-Detail Relationship
Parent Object	Field label	Field label
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

Milestone-1:
Activity : Creating Developer Account
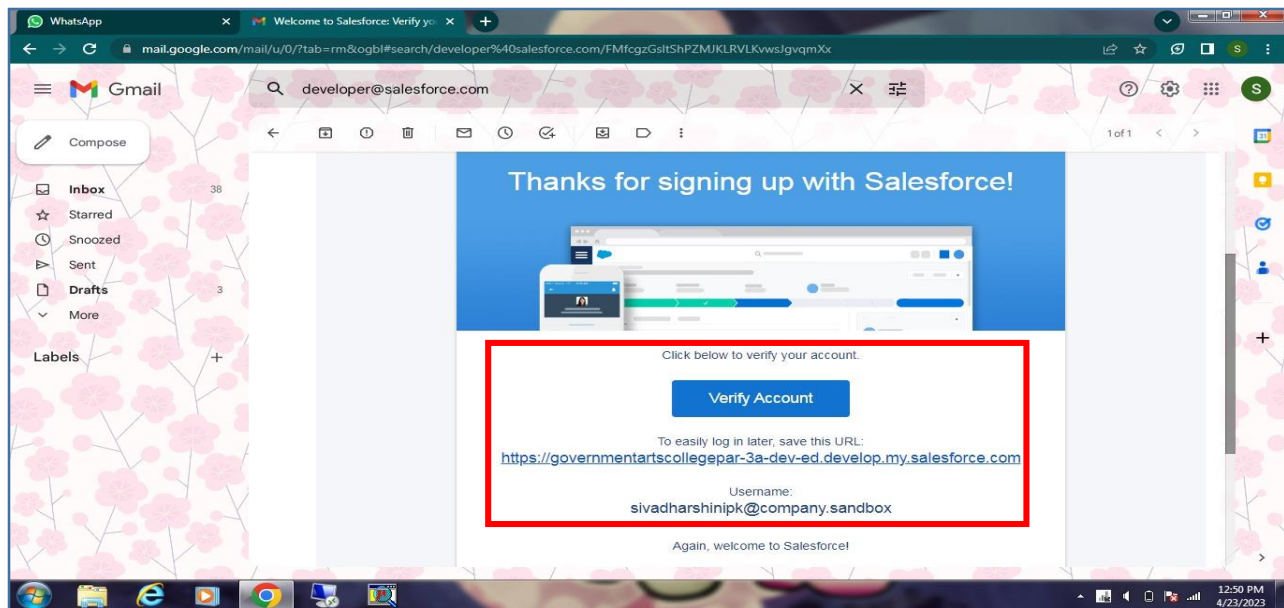
Login To Your Salesforce Account
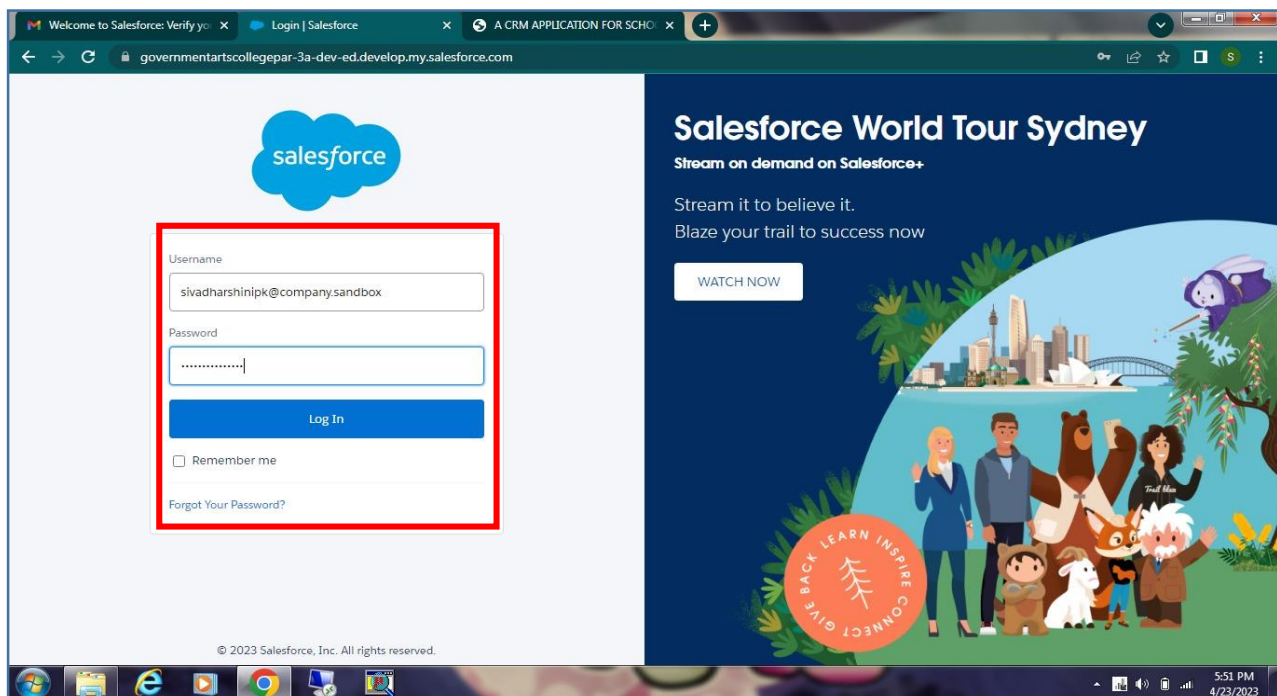
Milestone-2:Object

Activity-1: Creation of School Object

Create Tabs for School Object

Activity 2: Create student object

Create Tabs for Student Object

Activity 3: Create parent object

Create Tabs for Parent Object

Milestone-3: Lightning App

Create the School Management app
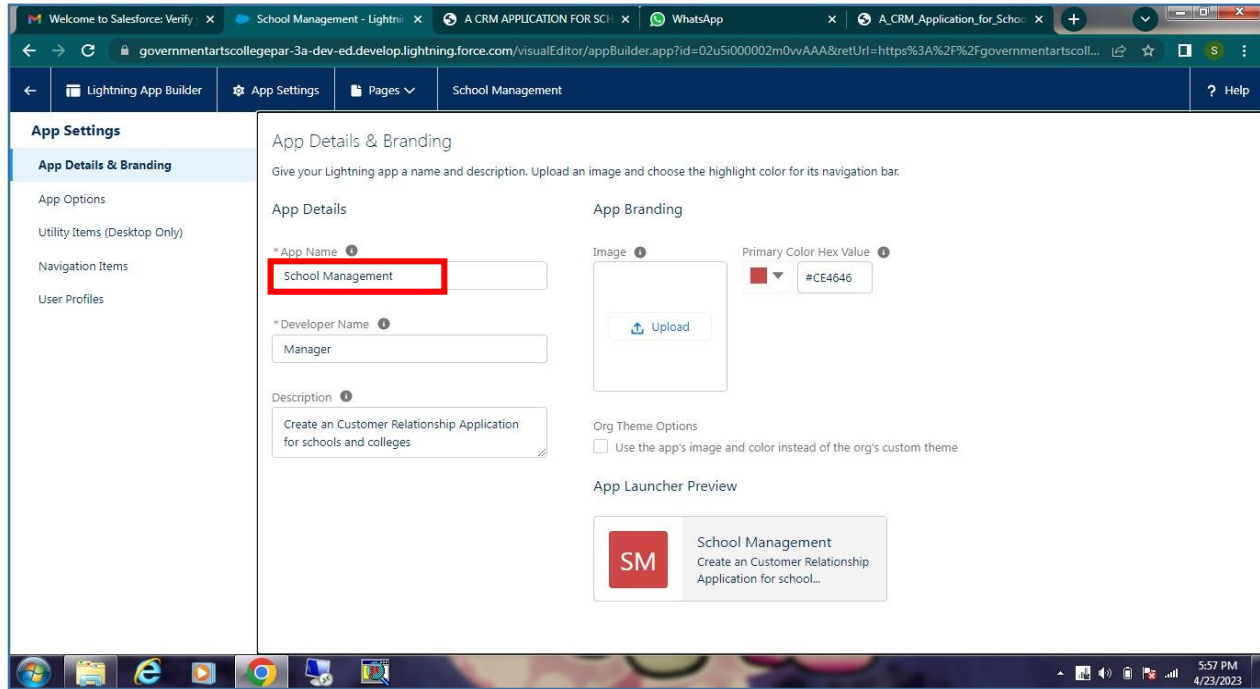
Milestone -4: Fields and Relationship
Activity 1: Creation of fields for the School objects:

Activity 2: Creation of fields for the Student objects:

Activity 3: Creation of fields for the Parent objects:

Milestone-5: Profile

Creation on profile:
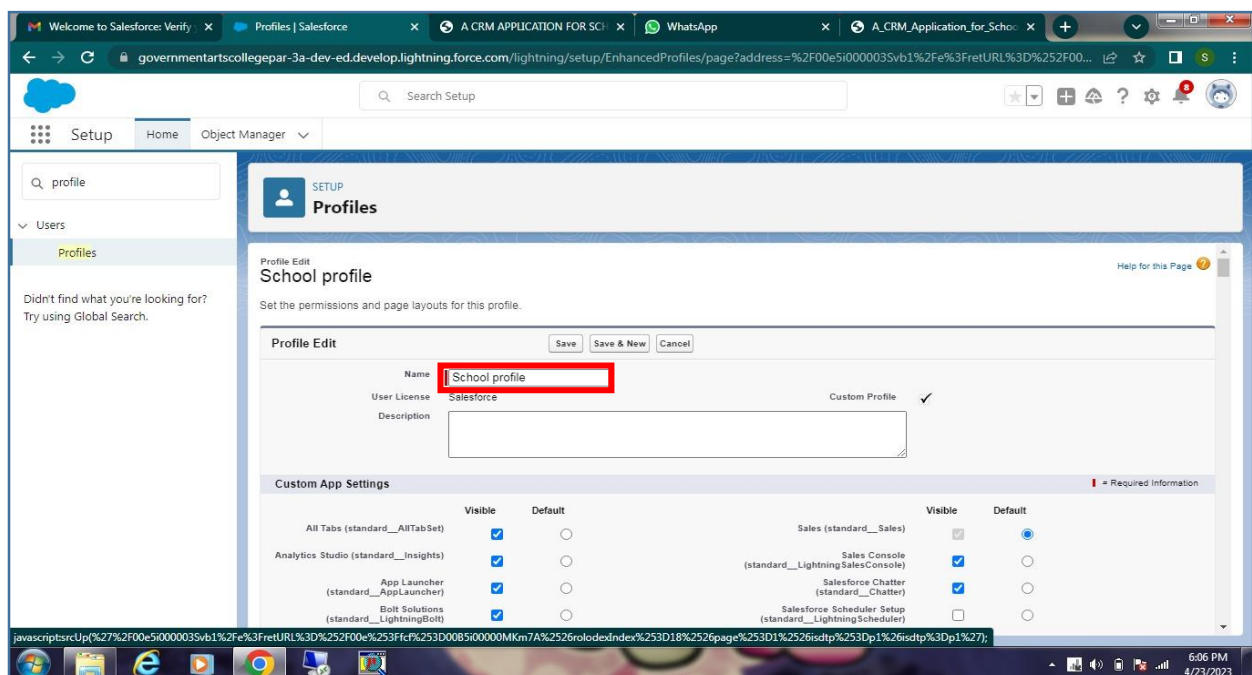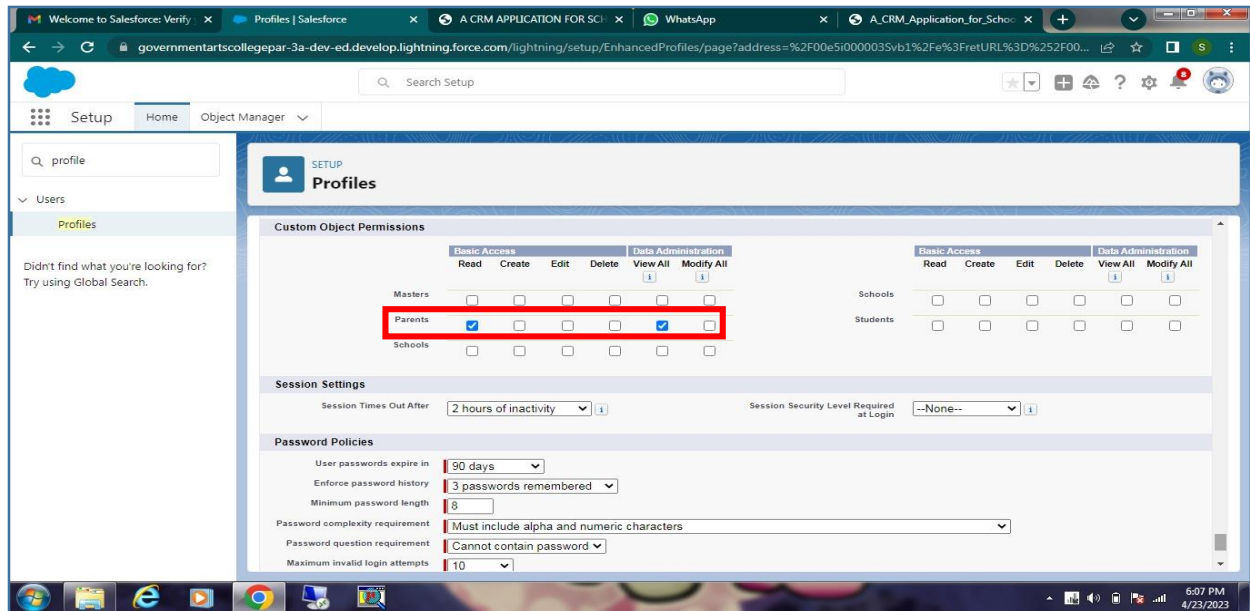
Milestone-6: Users

Creating a Users:
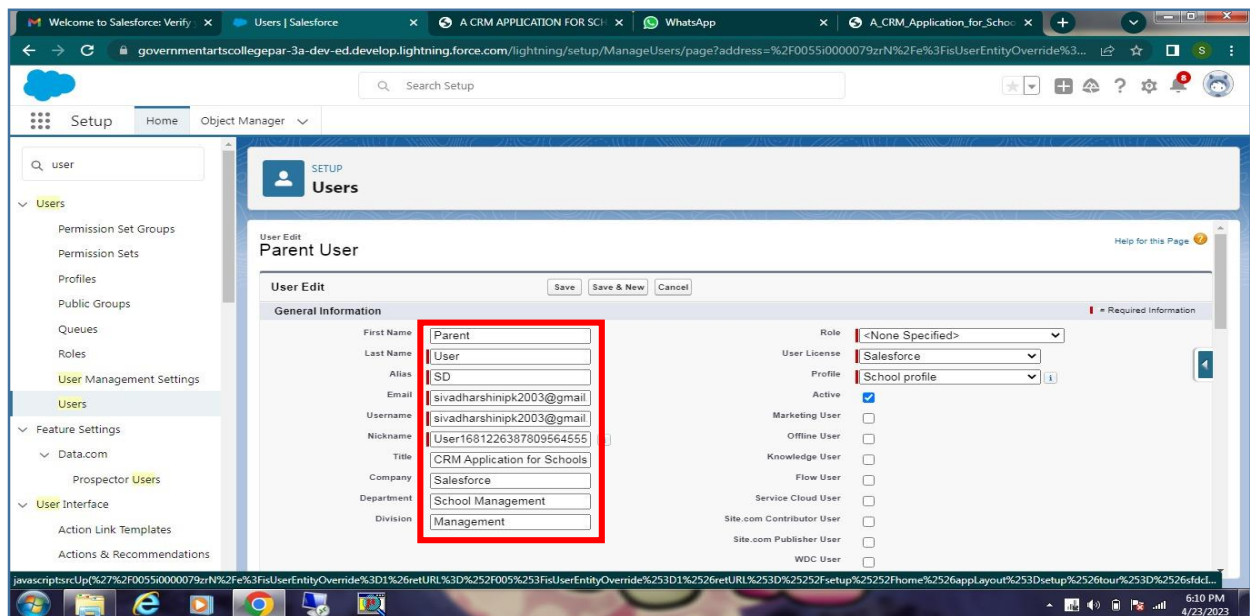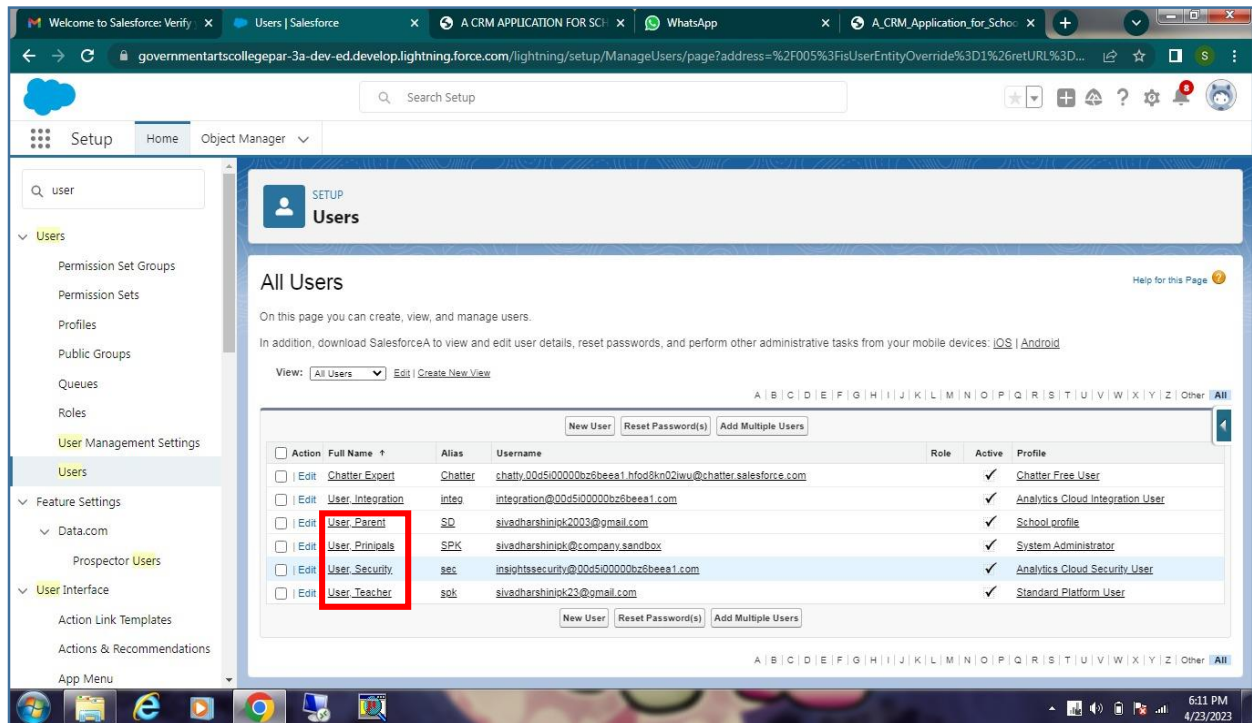
Milestone-7:Permission sets

Activity 1: Permission sets 1:
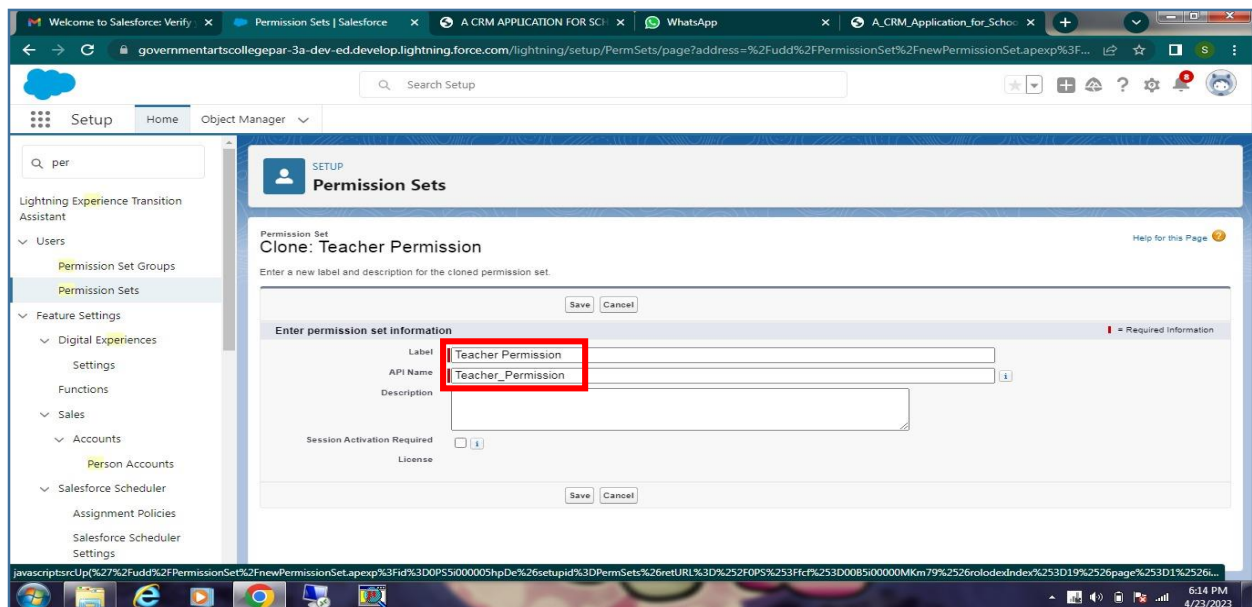
Activity 2: Permission sets 2:
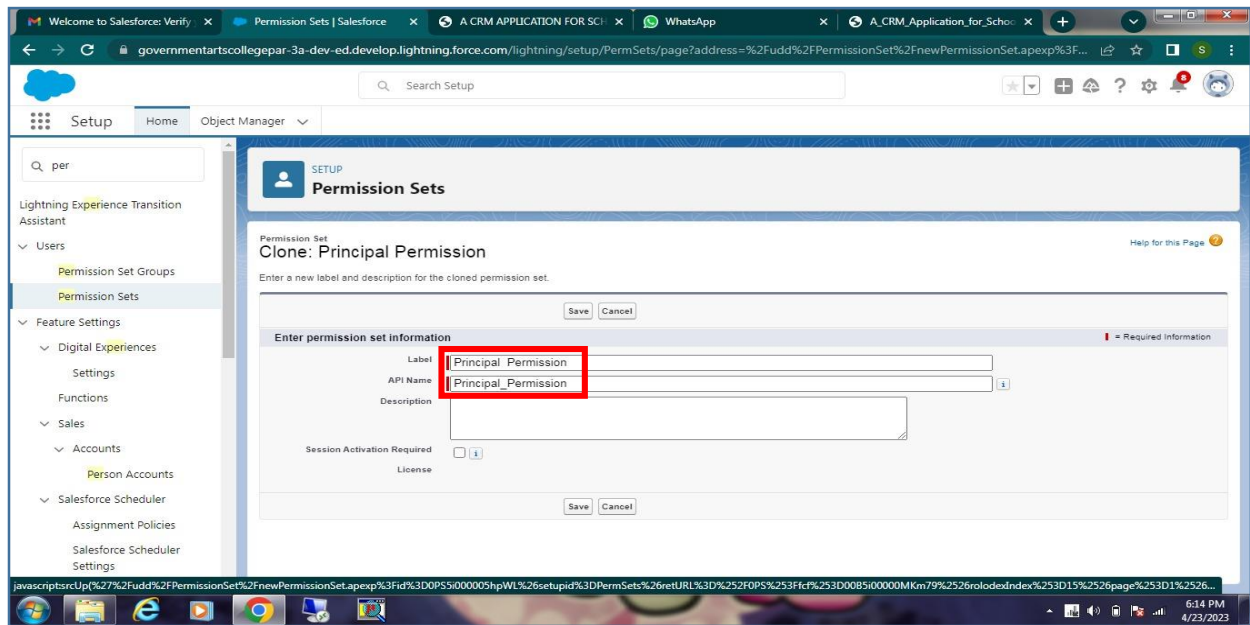
Milestone-8:Reports

Reports :
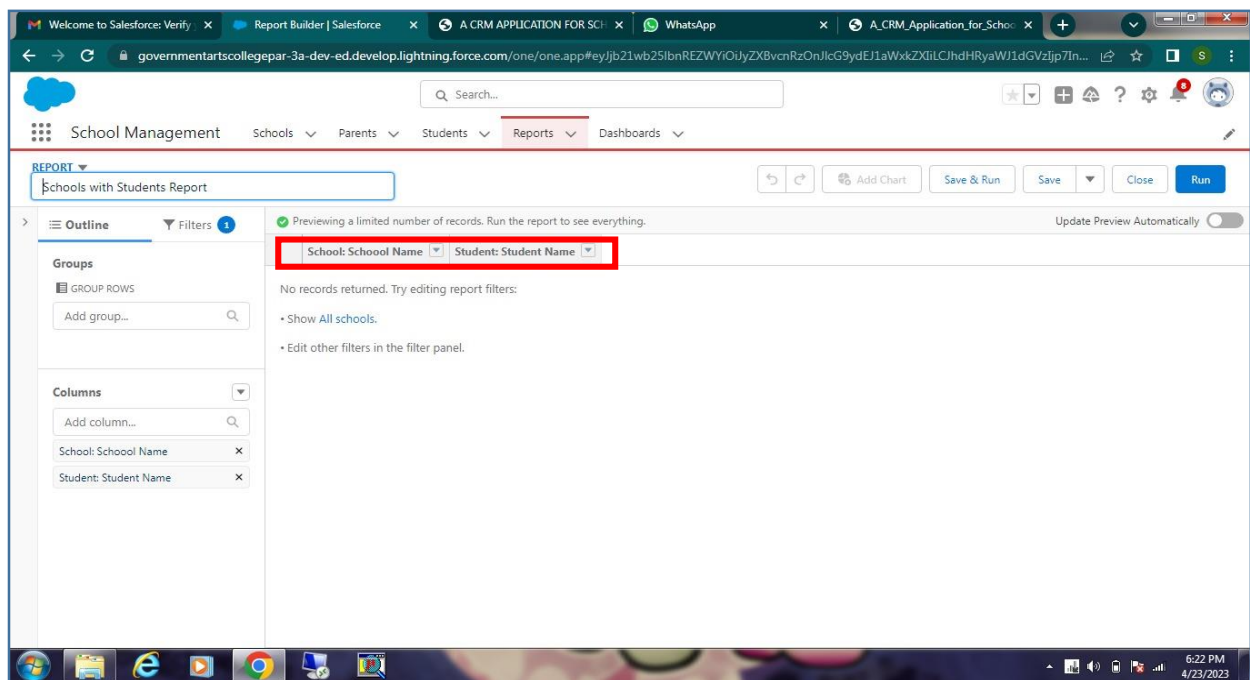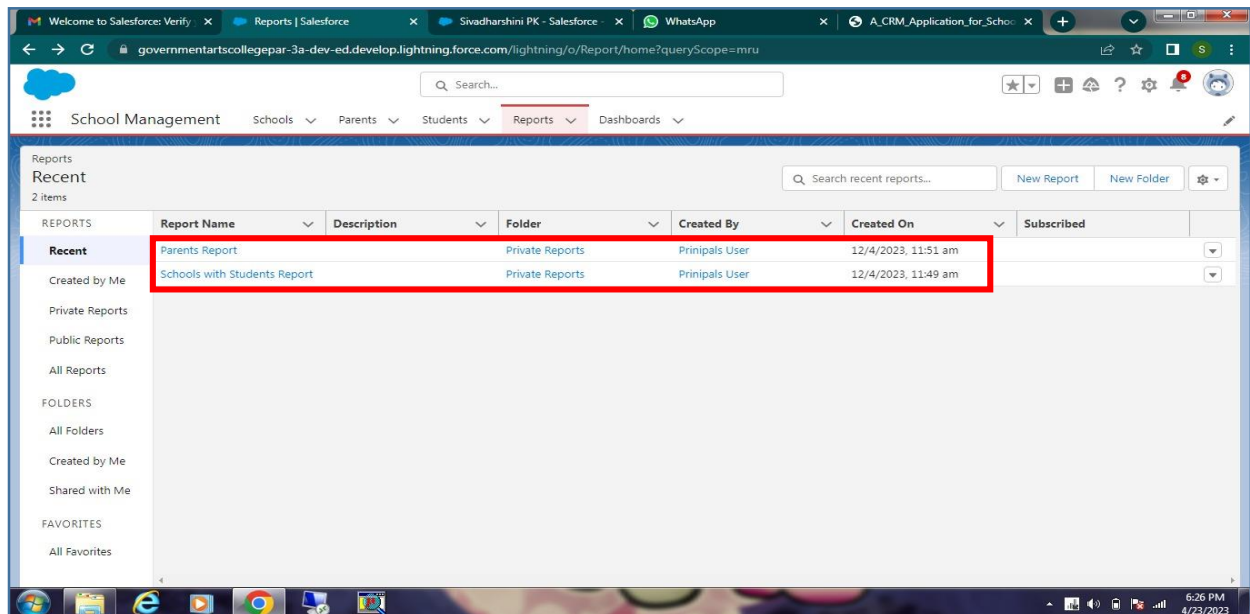
4   Trailhead Profile Public URL

Team Lead- https://trailblazer.me/id/sivpk

5   ADVANTAGES & DISADVANTAGE

- Reduction in the cost of expenses.
- Improving the quality of service / product.
- Improving the organization management process.
- Increased customer loyalty.
- Track and increase the number of potential clients.
- History of work with each student.
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.
- Poor communication.
- Lack of leadership.

6   Applications

- Tracking Customers.
- Collecting Data for Marketing.
- Improving Interactions and Communications.
- Streamlining Internal Sales Processes.

7   CONCLUSION

In recent years, there have been several changes in the ways of operating in Higher Education Institutes. There is a strong wave of digitization that has been creating an impact in the management styles, teaching methods, and educating the students. The institutes need automation in their processes; skill-based learning methods and better communication to maintain high standards of education.

8   FUTURE SCOPE

Customers now communicate through multiple channels, and businesses need to ensure that they have a consistent communication strategy across all these channels. Future CRM systems will allow businesses to interact with customers via email, phone, social media, and other channels.