

## CRM-APPLICATION FOR SCHOOL/COLLEGES

### 1 INTRODUCTION

#### 1.1 Overview

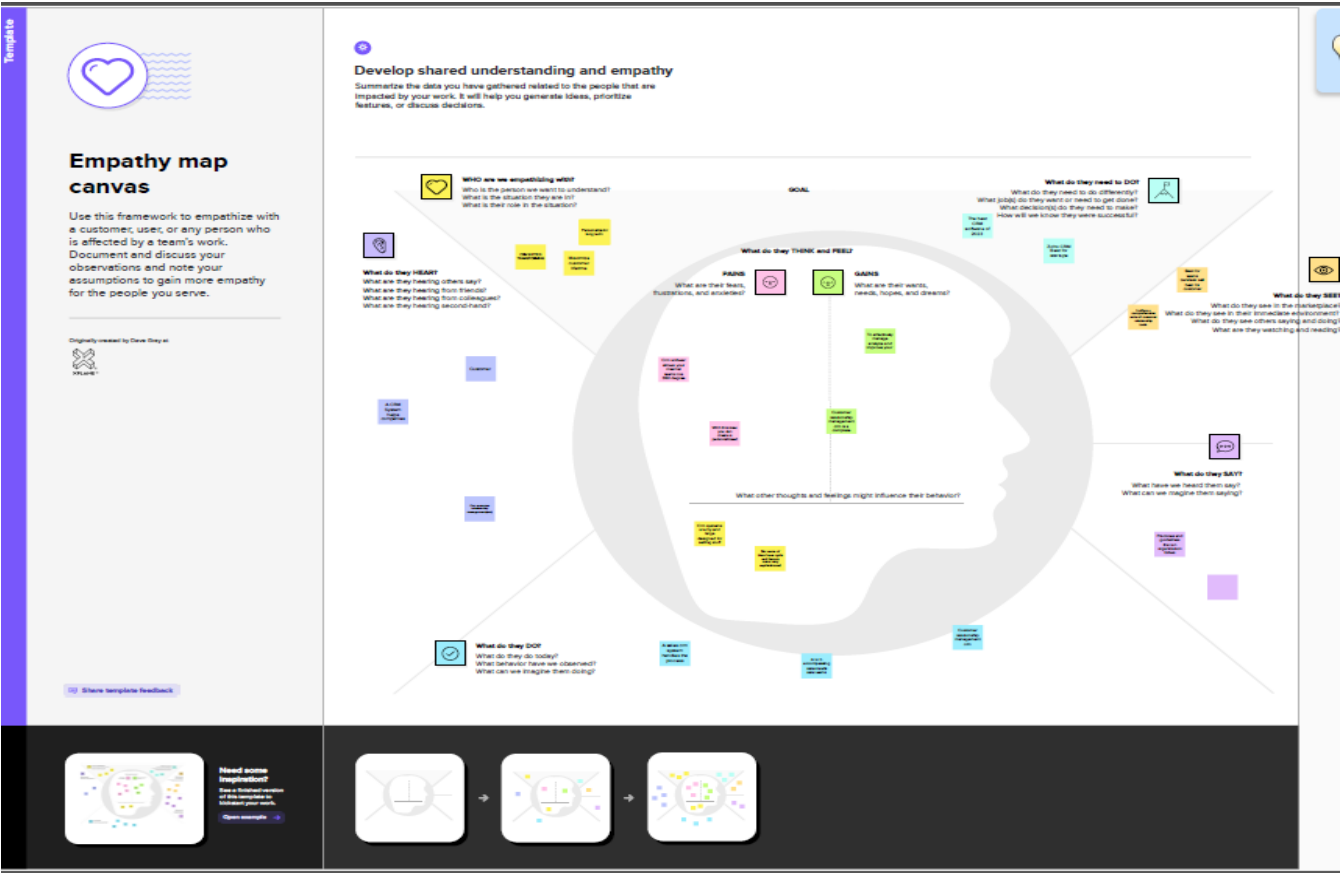
Customer relationship management (CRM) is the combination of practices, strategies And technologies that companies use to manage and analyze customer interactions and data Data throughout the customer lifecycle. The goal is to improve customer service relationships And assist in customer retention and drive sales growth.

#### 1.2 PURPOSE

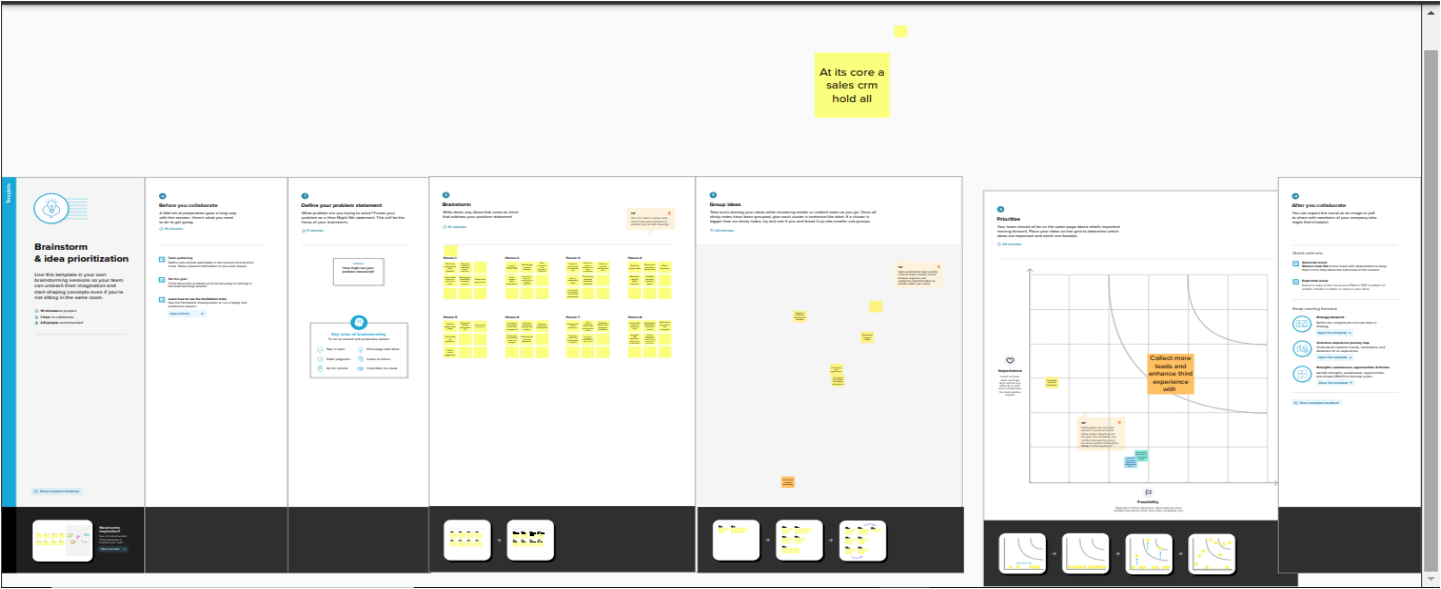
Customer relationship management (CRM) is a technology for managing all your Company’s relationships and interactions with customers and potential customers. The goal is simple improve business relationships. A CRM system helps companies stay Connected to customers, streamline, processes, and improve profitability.

### 2 Problem Definition & Design Thinking

#### 2.1 Empathy Map



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

Object name	Fields in the Object	
Student		
Parent		

## 3.2 Activity & Screenshot

(Milestone-2:OBJECT)

**Activity-1 : Creation of School Object**

**# Creation of Object for School Management**

The screenshot displays the Salesforce Object Manager interface within a web browser. The browser's address bar shows the URL: `https://govertartscollge-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/`. The Salesforce navigation bar at the top includes the 'Setup' menu, a search bar labeled 'Search Setup', and various utility icons. The main content area is titled 'Object Manager' and indicates '1 Items, Sorted by Label'. A search bar contains the text 'School'. To the right of the search bar are buttons for 'Schema Builder' and 'Create'. Below this, a table lists the objects. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. One object is listed: 'School' with API name 'School\_\_c' and type 'Custom Object'. The 'LAST MODIFIED' date is '13/04/2023' and the 'DEPLOYED' status is marked with a checkmark. A dropdown arrow is visible at the end of the row.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School__c	Custom Object		13/04/2023	✓

## ( Milestone-2:OBJECT )

### Activity-2 : Create Student Object

#### # Creation of Student Object

The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://govertartscollege-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/>. The page header includes a search bar with the text "Search Setup" and a navigation menu with "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 "Student". Below the search bar is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the "Student" object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student__c	Custom Object		13/04/2023	✓

## ( Milestone-2: OBJECT )

### Activity-2 : Create Parent Object

#### # Creation of Parent Object

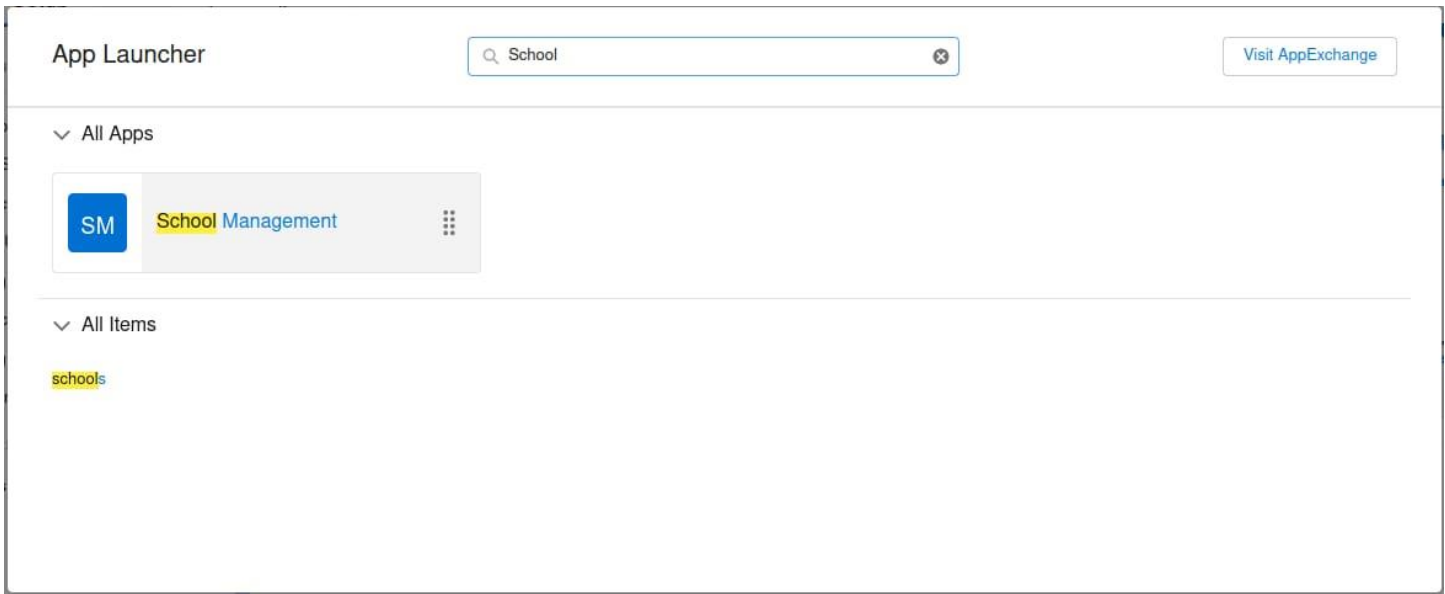
The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://govertartscollege-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/>. The page header includes a search bar with the text "Search Setup" and a navigation menu with "Setup", "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 the search bar is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the "Parent" object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		13/04/2023	✓

## ( Milestone-3: LIGHTNING APP )

### Activity-1 : Create the School Management App

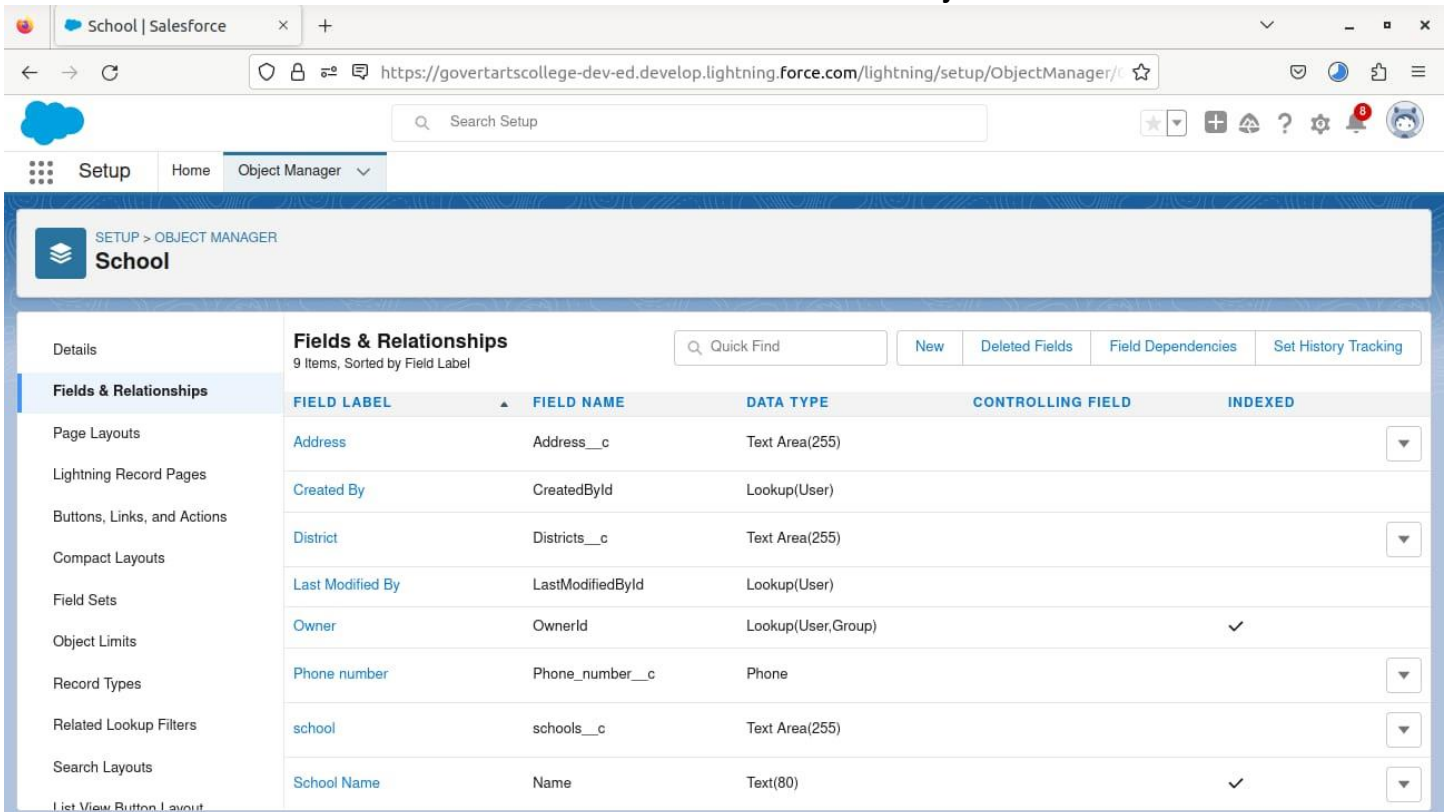
#### # Creation School Management App



## ( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-1 : Creation of fields for the School Objects

#### # Creation of fields for the School Object



## ( 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 Object Manager interface for the 'Student' 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, Search Layouts, and List View, Button Layout. The main content area is titled 'Fields & Relationships' and shows a table of 4 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and Student Name (Text(80)).

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)		✓
Student Name	Name	Text(80)		✓

## ( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-3 : Creation of fields for the Parent Objects

#### # Creation of fields for the Parents Object

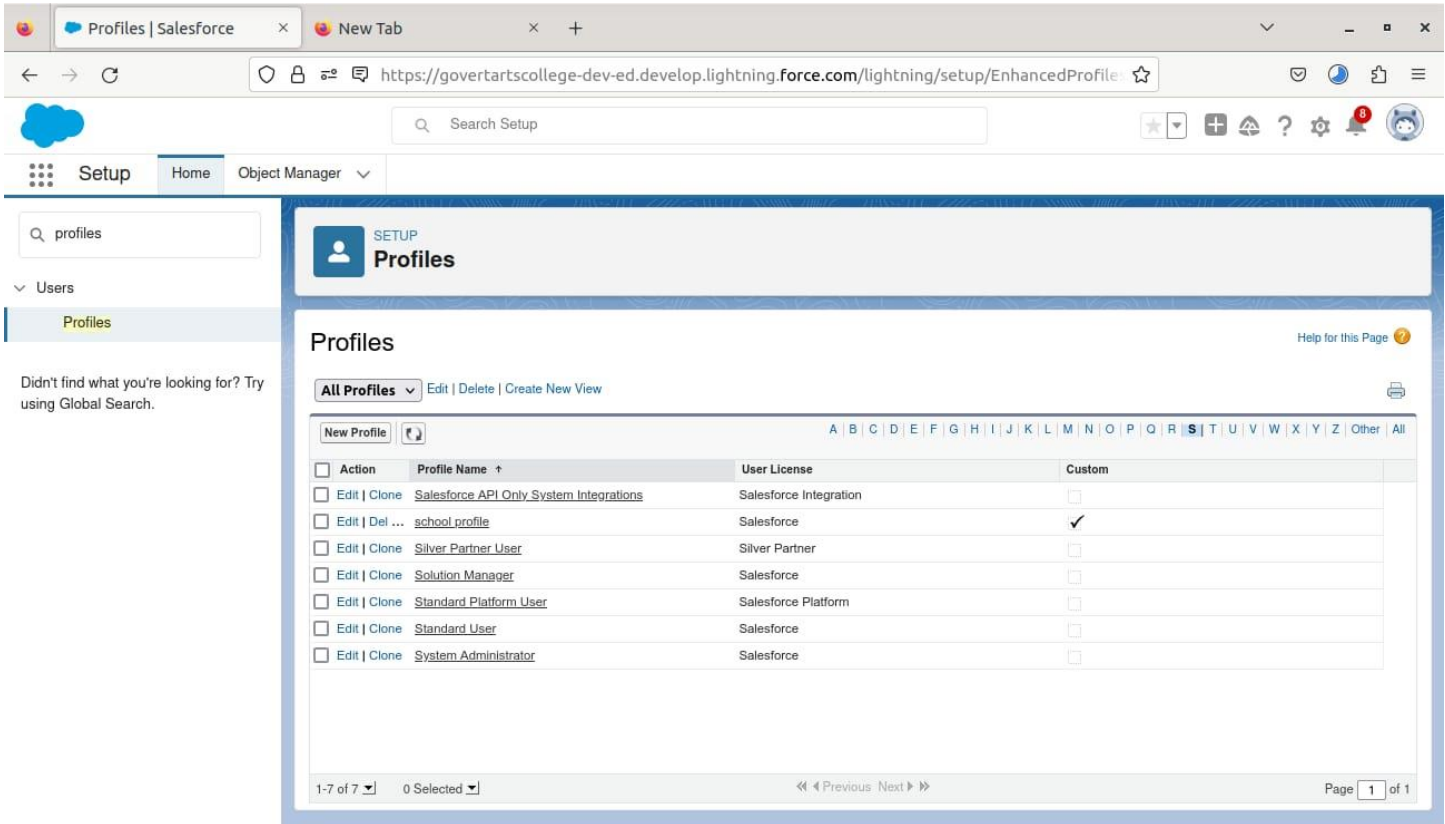
The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The main content area is titled 'Fields & Relationships' and shows a table of 4 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and Parent Name (Text(80)).

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 Name	Name	Text(80)		✓

## ( Milestone-5: PROFILE )

### Activity-1 : Creation on Profile

#### # Creation on Profiles



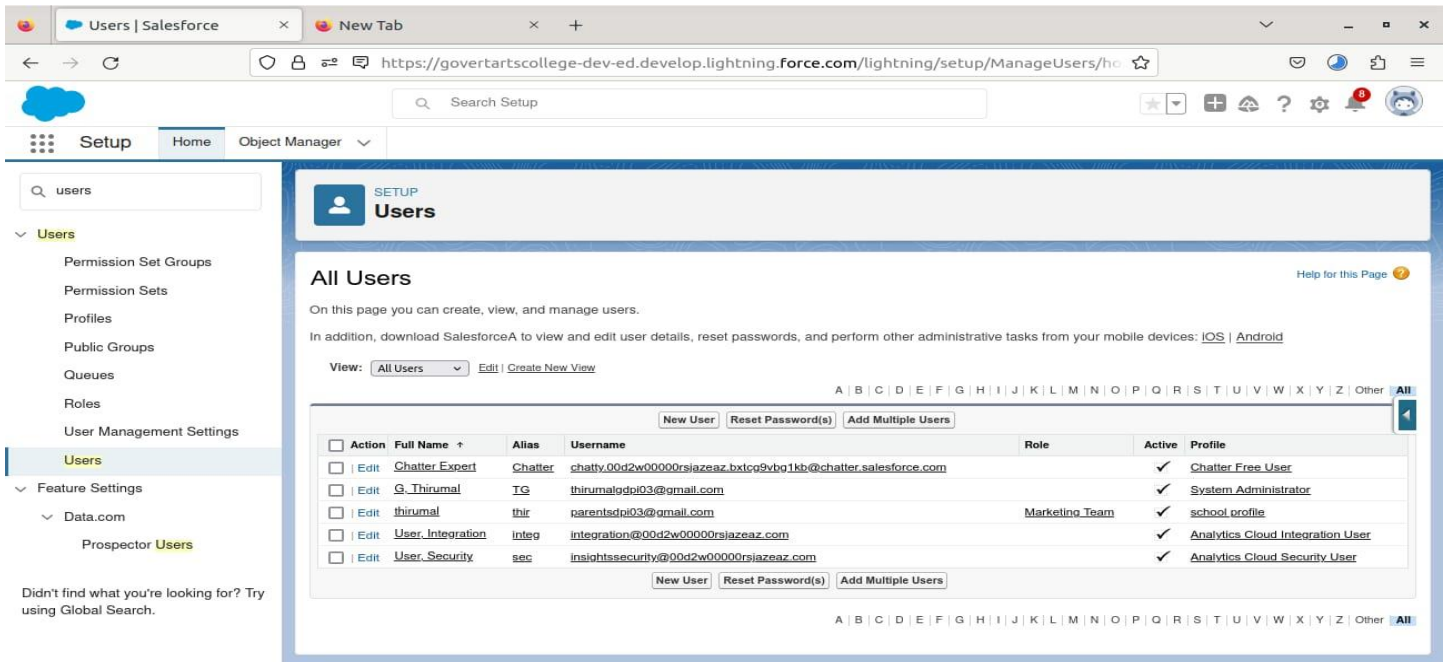
The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profiles' entered, and a list of navigation items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and includes a 'New Profile' button and a list of existing profiles. The table below shows the list of profiles with columns for Action, Profile Name, User License, and Custom.

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"/>

## ( Milestone-6: USERS )

### Activity-1 : Creating a Users

#### # Creating a Users



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' entered, and a list of navigation items including 'Users' and 'Feature Settings'. The main content area is titled 'All Users' and includes a 'New User' button and a list of existing users. The table below shows the list of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatterv.00d2w00000rsjazeaz.bx1co9xbg1kb@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	G. Thirumal	IG	thirumalg03@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	thirumal	thir	parents03@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	school_profile
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w00000rsjazeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w00000rsjazeaz.com		<input checked="" type="checkbox"/>	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 'permission' and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a sub-header 'All Permission Sets' with links for 'Edit', 'Delete', and 'Create New View'. Below this is a table with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table contains one entry: 'principal permission'.

Action	Permission Set Label	Description	License
<a href="#">Del</a>   <a href="#">Clone</a>	principal permission		

## ( Milestone-8: REPORTS )

### Activity-1 : Reports

#### # Reports

The screenshot shows the Salesforce Reports interface. The left sidebar contains a search bar with 'Search...' and a list of navigation items: School Management, schools, Students, Parents, Reports (highlighted), and Dashboards. The main content area is titled 'Recent' and includes a sub-header 'Search recent reports...' with buttons for 'New Report' and 'New Folder'. Below this is a table with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The table contains one entry: 'New Accounts Report'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Accounts Report		Private Reports	Thirumal G	13/4/2023, 2:20 pm	

## 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/thirg7>

Team Member 1 - <https://trailblazer.me/id/arunt59>

Team Member 2- <https://trailblazer.me/id/surym27>

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

## 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.

