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 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   Emapthy Map Canvas
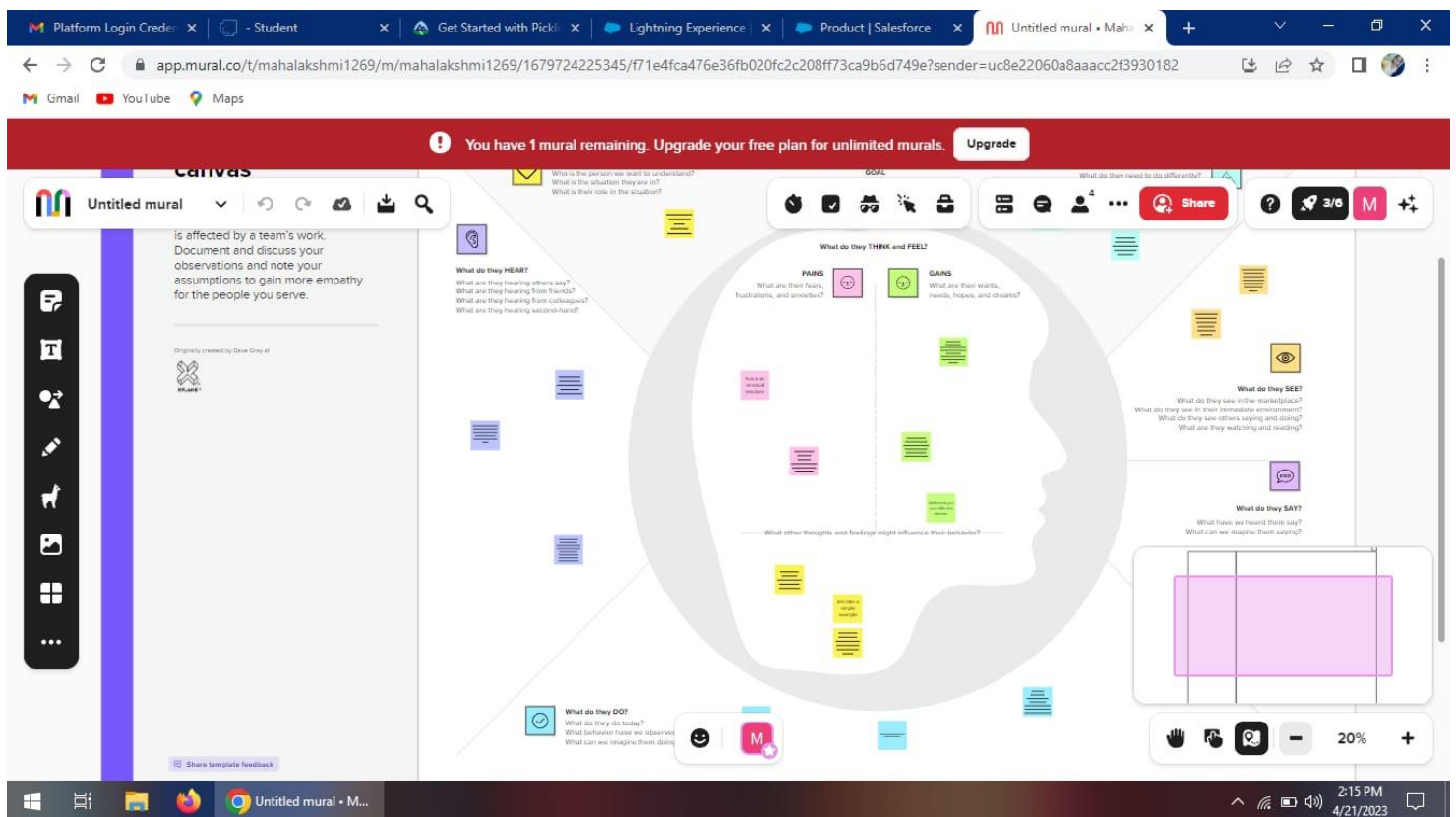
2.2   Brainstorming & Idea Prioritization Template
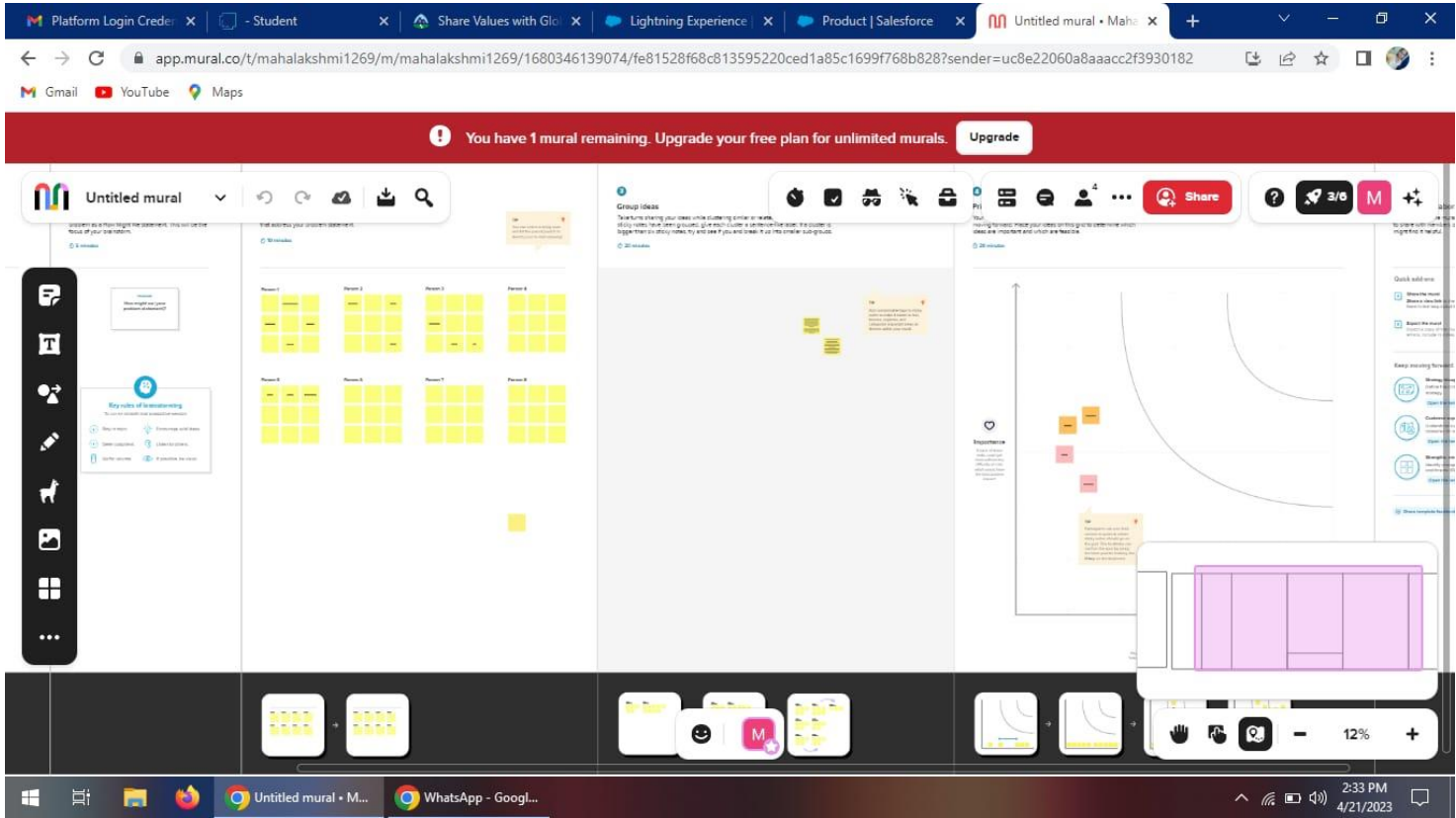
3   RESULT

3.1   Data Model:

Object Name	Fields in the Object	
	Field label	**Data type**
	Address	Text area
	District	Text area
School	State	Text area
	School	Text area
	Phone Number	Phone
	No of Students	Roll up Summary
	Highest Mark	Roll up Summary

Student

Field label	Data type
Phone Number	Phone
School	Master-Detail Relationship
Result	Picklist
Class	Number

Parent

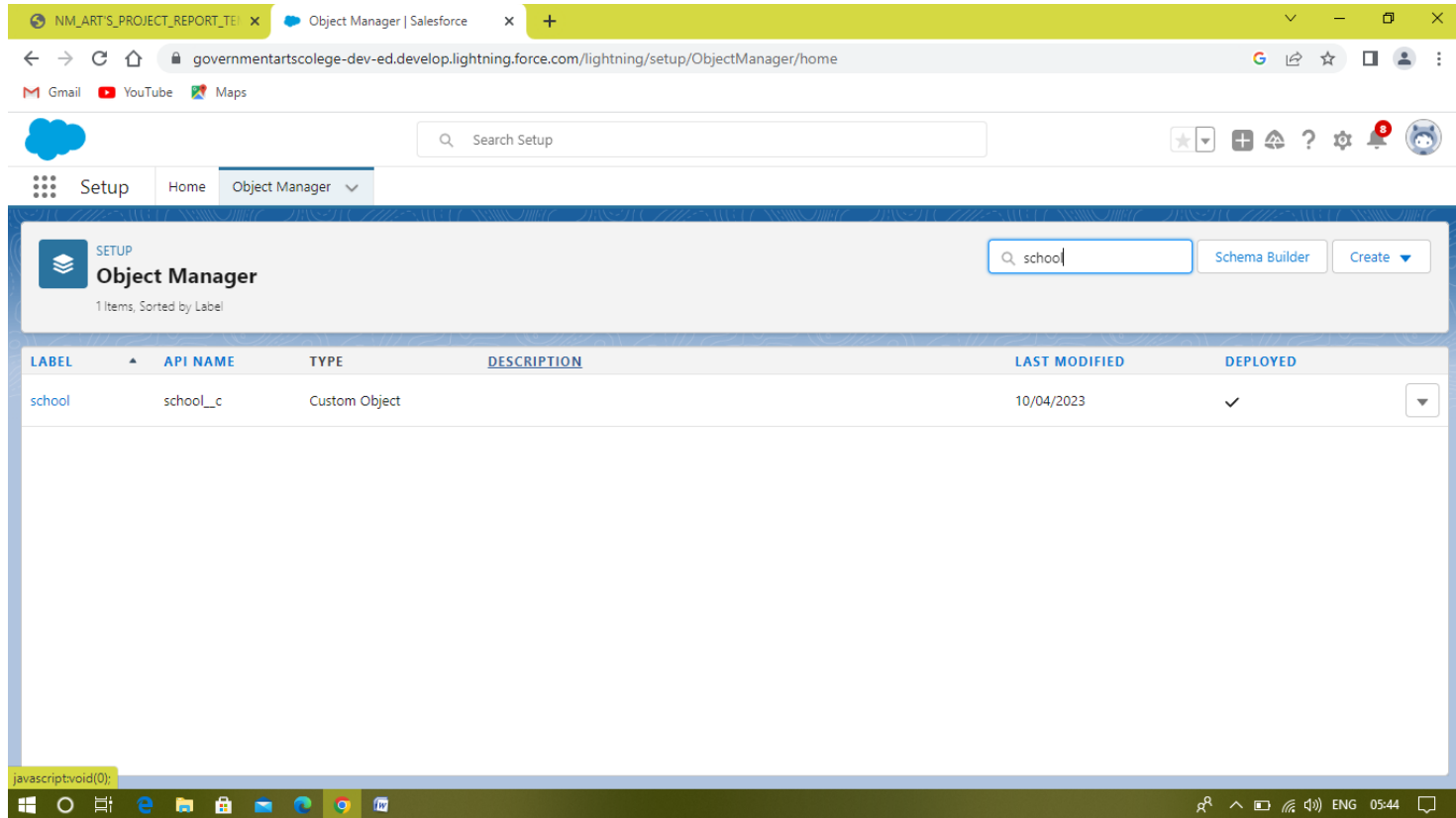| Field label	Data type
Parent Address	Text Area
Parent Number	Phone

3.2   Activity & Screenshot

(Milestone-2:OBJECT)

Activity-1 : Creation of School Object

Creation of Object for School Management

(Milestone-2:OBJECT)

Activity-2 : Create Student Object

Creation of Student Object

(Milestone-2: OBJECT)

Activity-2 : Create Parent Object

Creation of Parent Object

(Milestone-3: LIGHTNING APP)

Activity-1 : Create the School Management App

Creation School Management App

App Launcher

School Management

Visit AppExchange

⌄ All Apps

School Management ⠿
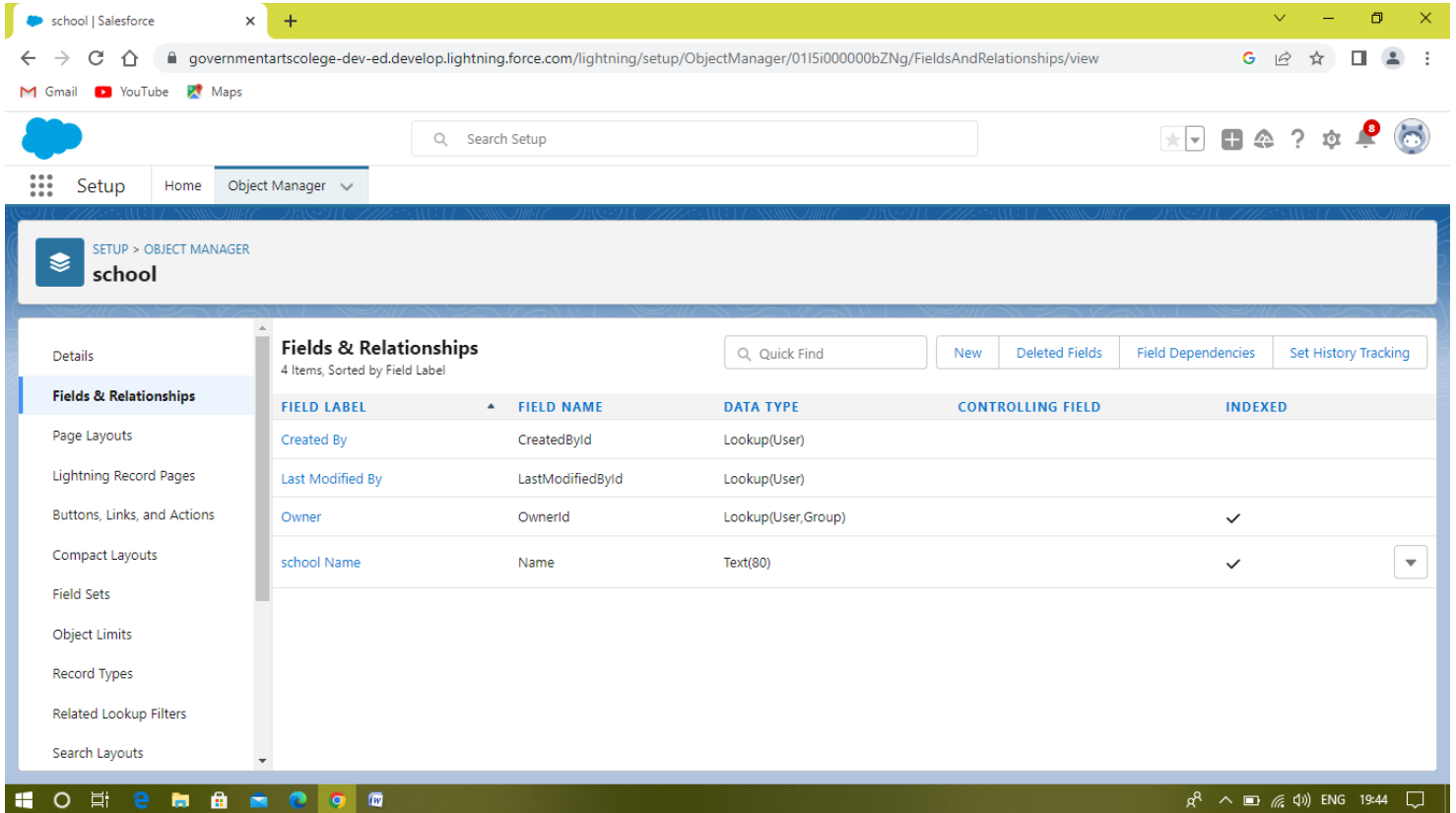
⌄ All Items

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-1 : Creation of fields for the School Objects

Creation of fields for the School Object

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-2 : Creation of fields for the Student Objects

Creation of fields for the Student Object

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-3 : Creation of fields for the Parent Objects

Creation of fields for the Parents Object

governmentartscolege-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5i000000bZNq/FieldsAndRelationships/view

Gmail   YouTube   Maps

Search Setup

Setup   Home   Object Manager ⌄

SETUP > OBJECT MANAGER

parent

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

Fields & Relationships
4 Items, Sorted by Field Label

Quick Find   New   Deleted Fields   Field Dependencies   Set History Tracking

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)		✓	⌄

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ENG   19:46
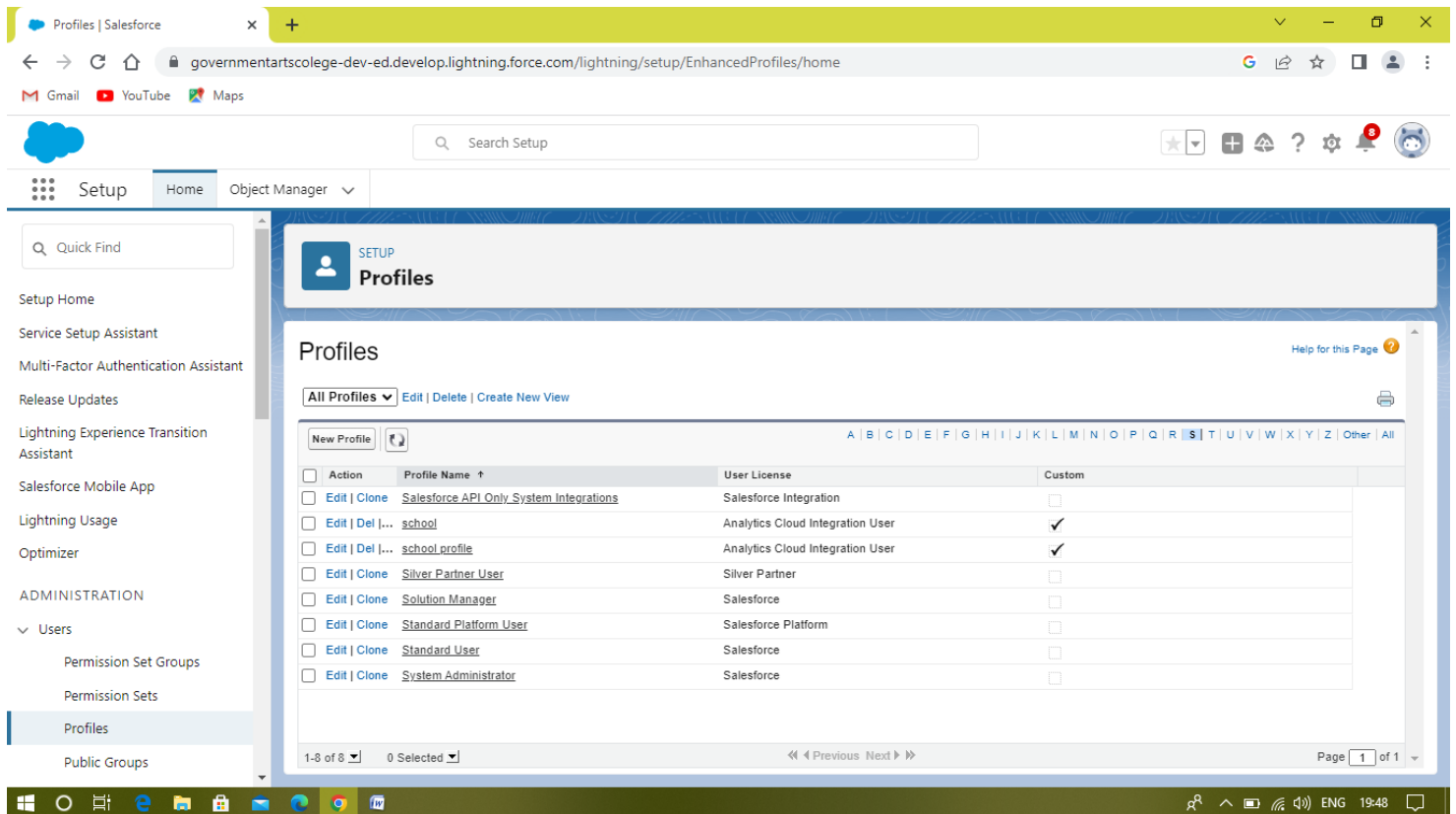
(Milestone-5: PROFILE)

Activity-1 : Creation on Profile

Creation on Profiles

(Milestone-6: USERS)

Activity-1 : Creating a Users

Creating a Users

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1:

To Set Permissions

Activity-2 : Permission sets 2:

To Set Permissions
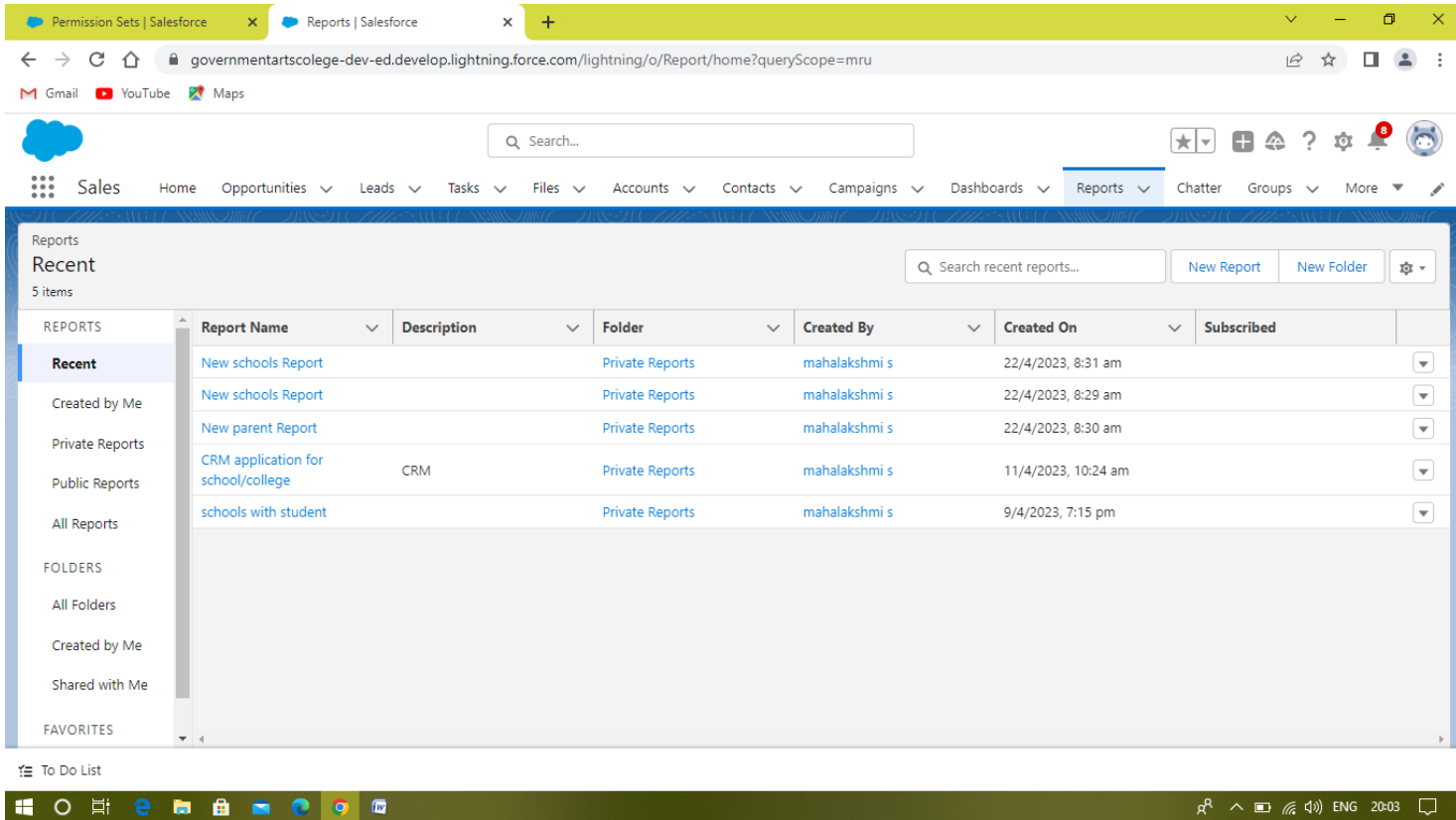
(Milestone-8: REPORTS)

Activity-1 : Reports

Reports

4   **TRAILHEAD PROFILE PUBLIC URL:**

TEAM LEAD   -   http:trailblazer.me/id/ r145

Team Member 1 -   http:trailblazer.me/id/thirp6

Team Member 2 -   http:trailblazer.me/id/mahas71

Team Member 3 -   https:trailblazer.me/id/m076

[ADVANTAGES]

1. Better customer service

Modern CRM software has many functions, but the software was created to improve business-customer relationships, and that's still its main benefit.A CRM manages all of your contacts and gathers important customer information– like demographics, purchase records and previous messages across all channels – and makes it easily accessible to anyone in your company who needs it.
This ensures that your employees have all they need to know about the customer at their fingertips and can provide a better customer experience, which tends to boost customer satisfaction.

2. Increased sales

A CRM tool can help you streamline your sales process, build a sales pipeline, automate key tasks and analyze all of your sales data in one centralized place, potentially increasing sales and productivity. A CRM helps you establish a step-by-step sales process that your employees can rely on every time and that you can easily tweak as issues arise.

3. Improved customer retention

Once you've procured and converted leads, it's vital that you put in the work to retain them as customers and promote customer loyalty. High customer turnover can have many negative efects for your business, like diminished revenue or disrupted cash flow, so use your CRM and the information it provides about your customers to encourage repeat business. The CRM will provide sentiment analysis, automated ticketing, customer support automation and user behavior tracking to help you determine problems and quickly address them with your customers.

4. Detailed analytics

It's one thing to have plenty of data about your customers, but you need to know what it means and how to use it. CRM software typically has built-in analytic capabilities to contextualize data, breaking it down into actionable items and easily understood metrics. Metrics such as click-through rates, bounce rates, and demographic information allow you to judge the success of a marketing campaign and optimize accordingly.

5. Higher productivity and efficiency

CRM software uses marketing automation technology, which expedites menial tasks like drip campaigns and frees up your employees' time to focus on work only humans can handle, like creating content. It can also ensure that no tasks slip through the cracks (e.g., all important emails are always sent to the right people). Additionally, a CRM can show you a dashboard of how your business processes are working and where your workflows could improve. [Read related article: How Workplace Automation Software Can Help Your Business]

6. Automated sales reports

Your team can easily collect and organize data about prospective and current customers using the CRM software's dashboard and reporting features, which allow employees to automate and manage their pipelines and processes. The CRM can also help your team members evaluate their performance, track their quotas and goals, and check their progress on each of their projects at a glance.

[DISADVANTAGES]

1. A costly project

CRM software tool is an expensive investment that some businesses can only aford, 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 afect.

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. Have poor usability

Some CRM systems could be more user-friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.

3. 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.

4. Having lots of security concerns

There are many security issues with CRM, such as data loss and data being hacked by someone. In CRM, the collected data is stored at one centralized location that can be accessed by unfair means. In another case, inaccurate data can be added by employees, or they manipulate figures leading to wrongful planning.

5. Not suitable for every business

Every business can't aford CRM for data collection and connecting with customers. Some businesses can't correct 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.

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.

7. Experience-based procedure in all the stages

Small businesses may not require it, but large businesses use CRM on a large scale. For this purpose, they train their employees by providing training sessions from the appointed professionals. The company invests in employee training to improve its productivity, where employees encounter and learn the various features and functions of CRM. This experience will help them in all the stages of CRM.

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**

Business is an ongoing process that has to update itself with time
(adopt new technologies) to remain in the competition.
Before technology, customer data or CRM was based on papers, but slowly,
companies started tracking customer-related data with spreadsheets,
emails, address books, and other ways.

But due to a lack of automation and integration, it becomes difficult for
them to find and share up-to-date information when required quickly.
It also down their ability to create marketing strategies, provide customers
flawless service, and peruse new sales leads.

CRM is a powerful tool that automatically collects information about
existing and prospective customers (their personal or professional
information, including social media posts, phone numbers, email
addresses, phone numbers, service, purchase history, and support tickets).
Further, the whole information is integrated by the system and generates
consolidated profiles that can be shared with appropriate teams. One of
the best features of CRM is that it can connect with other business tools,
such as document-sharing apps and online chat.

Artificial intelligence and business intelligence capabilities are built in CRM
that accelerate administrative tasks and provide actionable insights.
Customer relationship management's advantages and disadvantages
will help you understand it in detail.

(Image result for crm future scope)

"[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations."