

# **A CRM APPLICATION TO MANAGE THE SERVICE OFFERED BY AN INSTITUTION**

## **Objective:**

The objective of this project is to leverage Salesforce's CRM platform to manage and optimize the services offered by an institution. This solution will streamline client interactions, automate service management workflows, enhance communication, and improve reporting and analytics to boost overall service delivery and customer satisfaction.

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## **1. Project Background**

Institutions such as universities, non-profits, healthcare providers, and service-based organizations often struggle with tracking and managing the wide range of services they offer to clients. A Salesforce-based CRM can address this by automating service delivery, providing real-time insights, managing client communications, and centralizing client data in a single platform. Salesforce offers flexibility and scalability that fits the diverse needs of institutions seeking to enhance service management.

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## 2. Project Scope

The Salesforce CRM will support the following functionalities:

- **Client Management:** Manage detailed client profiles, including personal information, service preferences, and interaction history.
- **Service Management:** Manage and track services offered by the institution, ensuring efficient scheduling, delivery, and feedback collection.
- **Sales & Service Automation:** Automate workflows related to service request approvals, follow-ups, billing, and renewals.
- **Communication Tools:** Utilize Salesforce's communication tools like email, Chatter, and in-app messaging to stay connected with clients and teams.
- **Reporting & Analytics:** Use Salesforce's advanced reporting tools to track service performance, customer satisfaction, and service trends.
- **Feedback Management:** Capture client feedback, enabling institutions to monitor service quality and make data-driven improvements.

- Integration with External Systems: Integrate Salesforce with third-party tools for payment processing, email, and SMS notifications, and other specialized applications.
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### **3. Key Features**

- Client & Contact Management:
  - Create detailed profiles for each client (students, patients, or partners), capturing contact information, preferences, and service history.
  - Categorize clients based on demographics, service needs, or engagement level for targeted service offerings.
- Service Catalog Management:
  - Define all services provided by the institution, including service descriptions, pricing, availability, and any associated workflows.
  - Use Salesforce's custom objects and fields to tailor service offerings and relate them to clients, accounts, and opportunities.

- Service Scheduling & Appointment Management:
  - Leverage Salesforce Calendar or third-party integrations to manage service appointments.
  - Send automated reminders and notifications to clients and staff members about upcoming services or events.
- Case Management:
  - Use Salesforce's Case feature to handle service requests, track issues, and ensure they are resolved in a timely manner.
  - Set up case escalation rules for urgent service issues or follow-ups.
- Task Automation & Workflow:
  - Implement Salesforce Process Builder and Flow to automate routine tasks like service confirmations, feedback collection, and invoicing.
  - Automate follow-up reminders, service renewals, and custom workflows to ensure efficient service delivery.

- Communication & Collaboration:
  - Use Salesforce Chatter for internal collaboration and communication.
  - Integrate Salesforce Email Studio or Marketing Cloud
  - for personalized, automated communication with
  - clients regarding service updates, confirmations, and promotions.
  - Utilize Salesforce Engage to allow service staff to interact with clients in real time.
- Client Feedback & Surveys:
  - Set up surveys or feedback forms post-service to collect client reviews and measure satisfaction.
  - Analyze the feedback to identify patterns, track customer satisfaction, and improve service quality.
- Reporting & Dashboards:
  - Create custom dashboards to track key metrics such as service performance, client satisfaction, service utilization, and financial data.

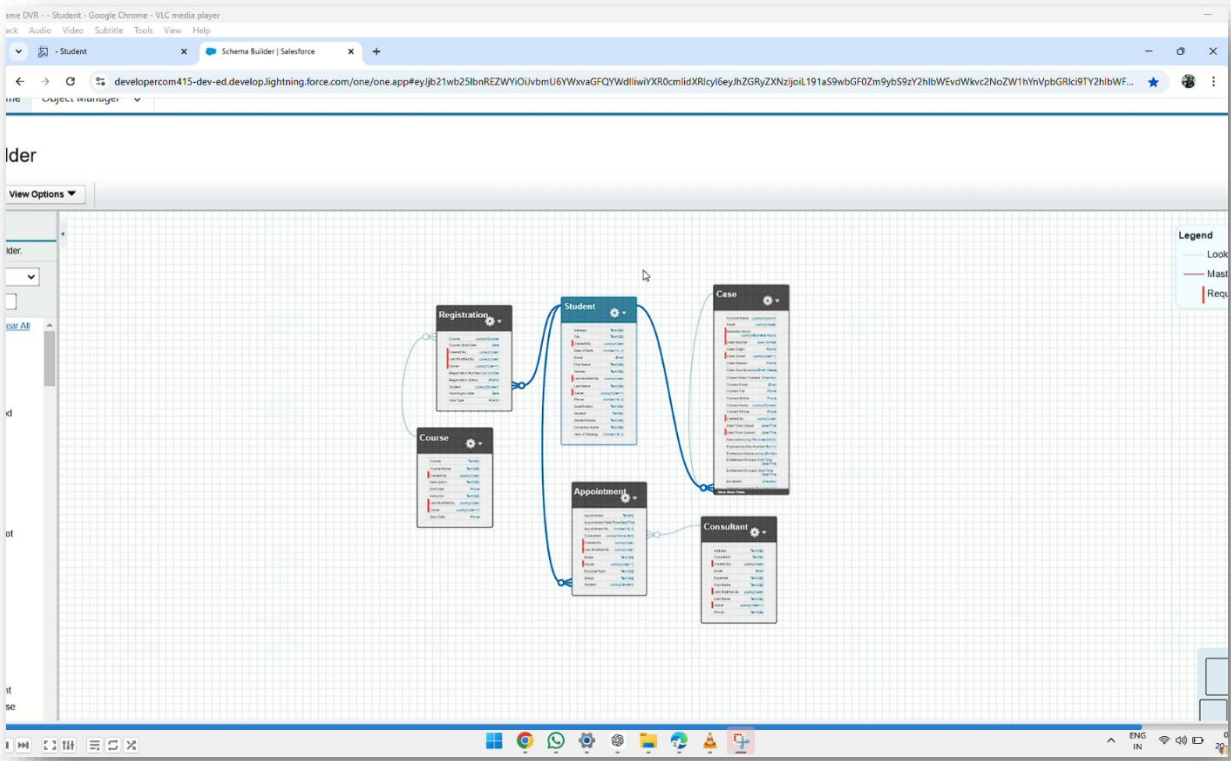
- Use Salesforce's powerful Reports to generate insights on trends and patterns related to service demand, client engagement, and performance
  - Billing and Invoicing:
    - Integrate with Salesforce's Billing system or third-party tools to manage invoicing, payments, and subscription-based services.
    - Automatically generate and send invoices for services rendered, along with payment reminders and receipts.
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#### **4. User Roles and Permissions**

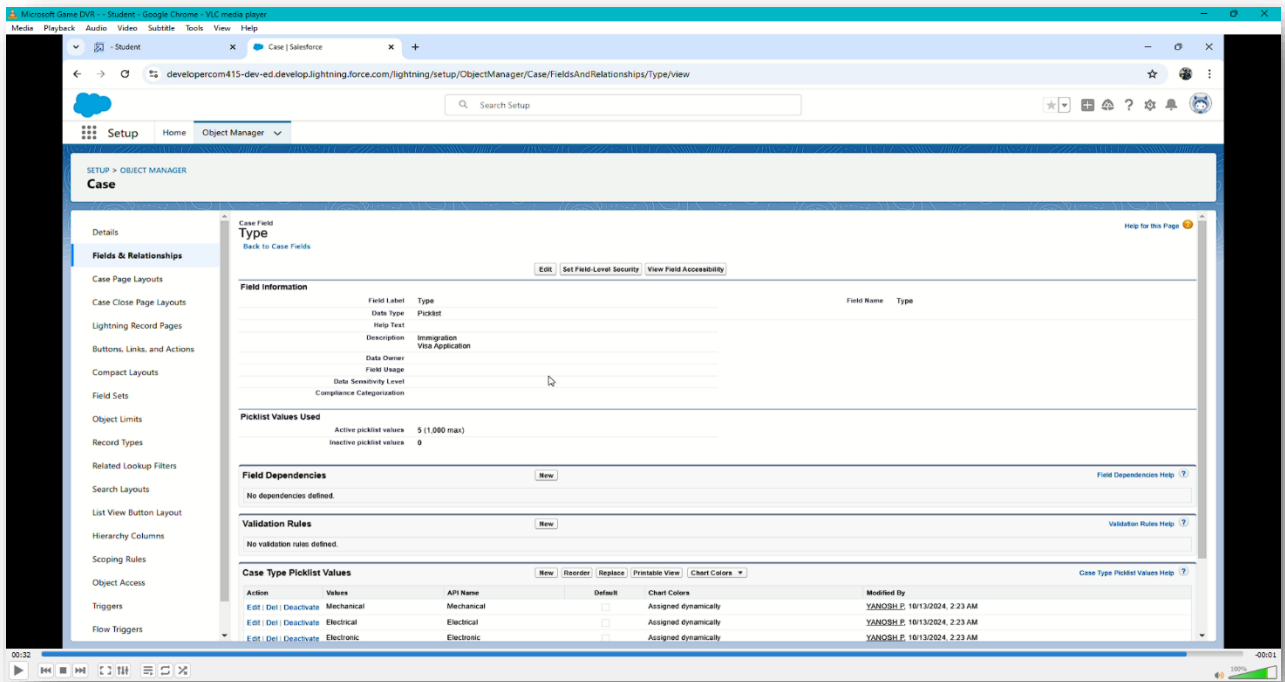
- Administrator:
  - Full access to all CRM features and settings, including data management, automation configurations, and user permissions.
- Service Manager:
  - Manage the service catalog, schedule appointments, view client profiles, and oversee service delivery.

- Customer Support:
    - Assist clients with booking services, resolving issues, and collecting feedback.
  - Client (End User):
    - Access to service offerings, ability to book or request services, view history, and provide feedback.
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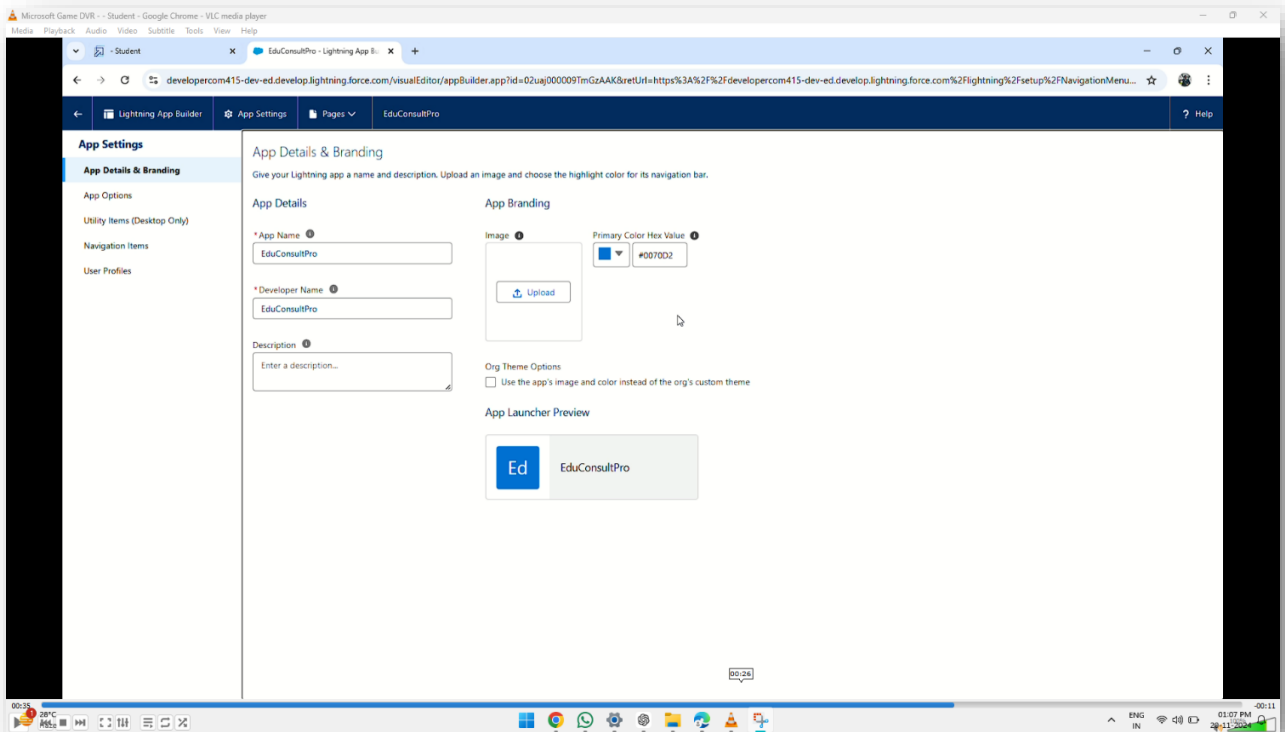
## Create Relationship Among The Objects:



## Configure The Case Objects:

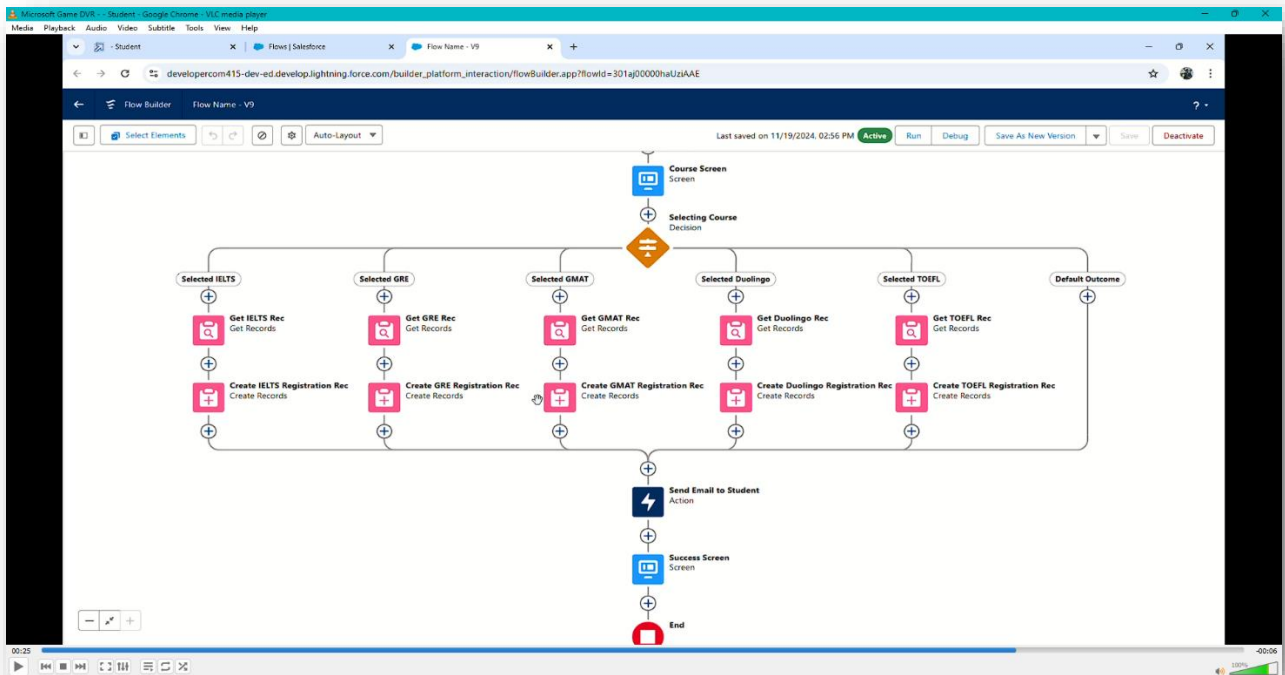


## Create A Lightning App:

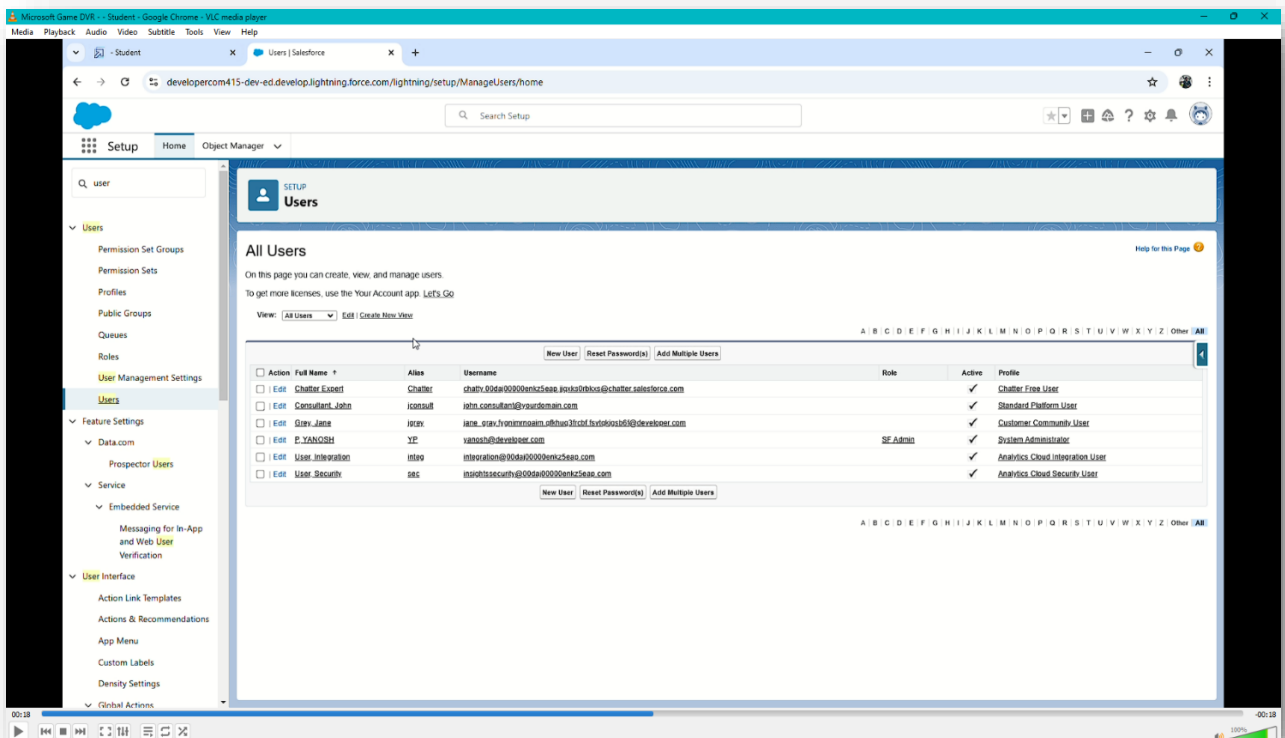




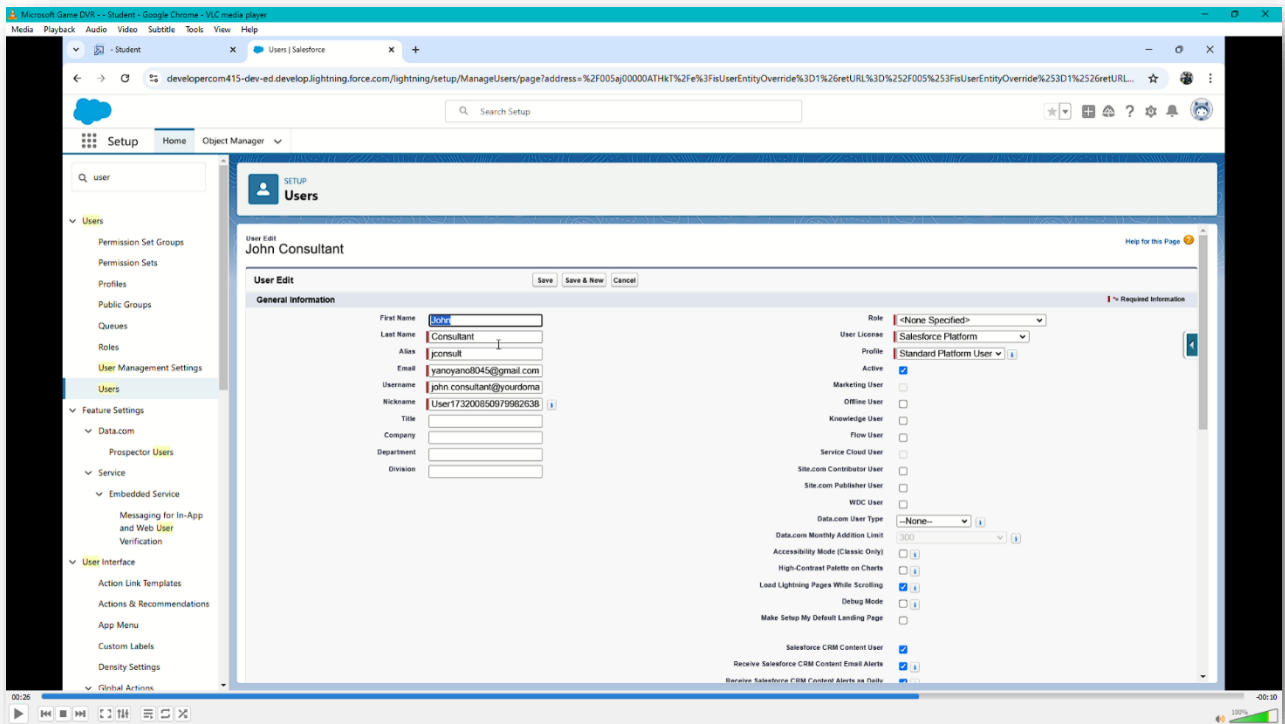
## Create A Screen Flow For Student Admission Application Process:



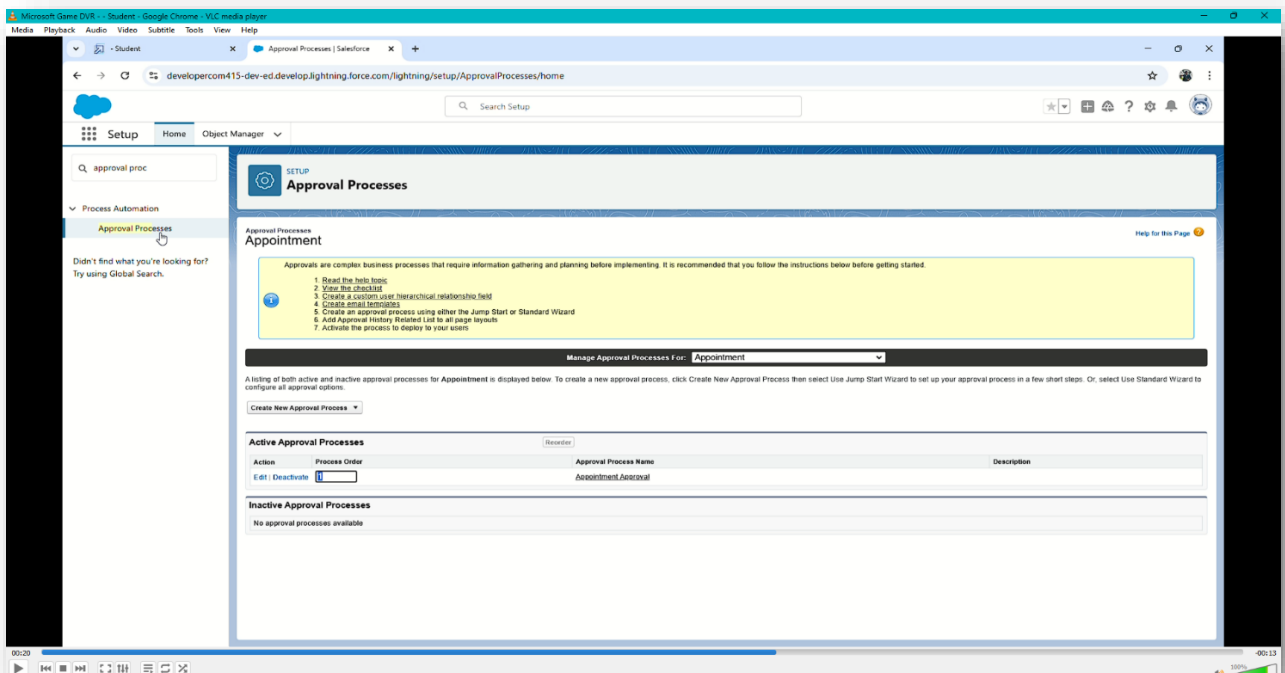
## Create Users:

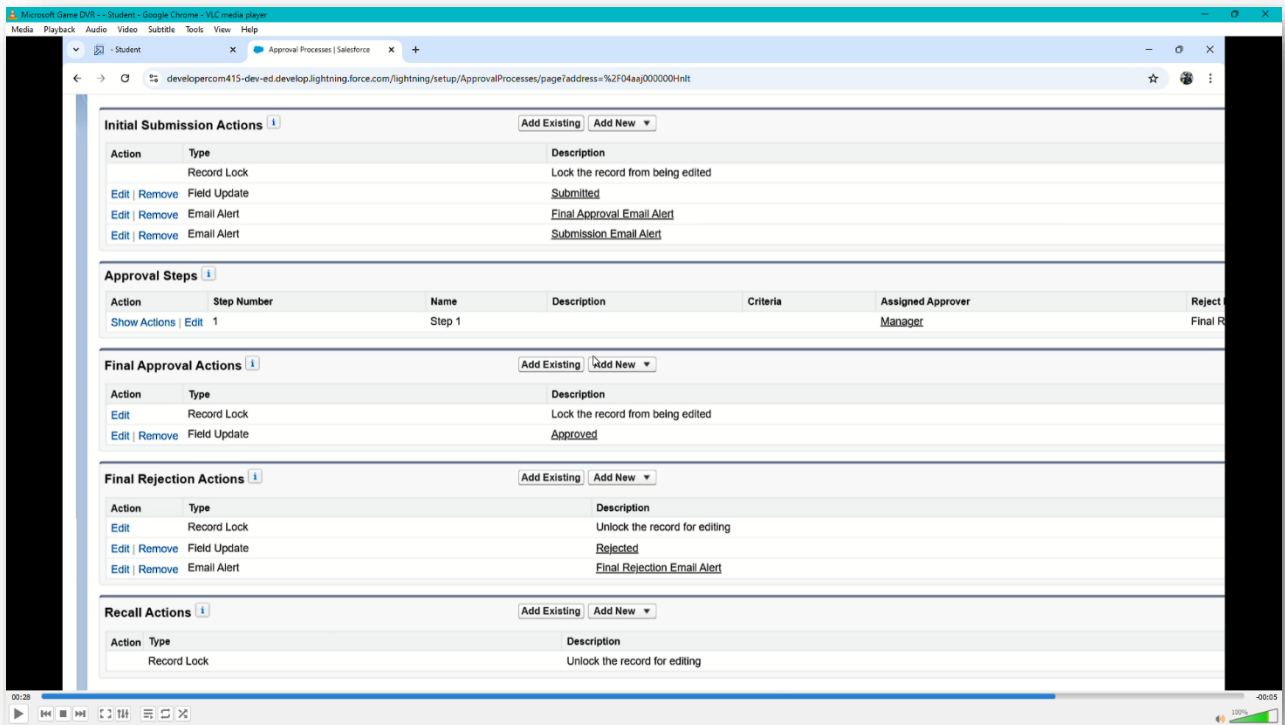


## Configure The User Settings:

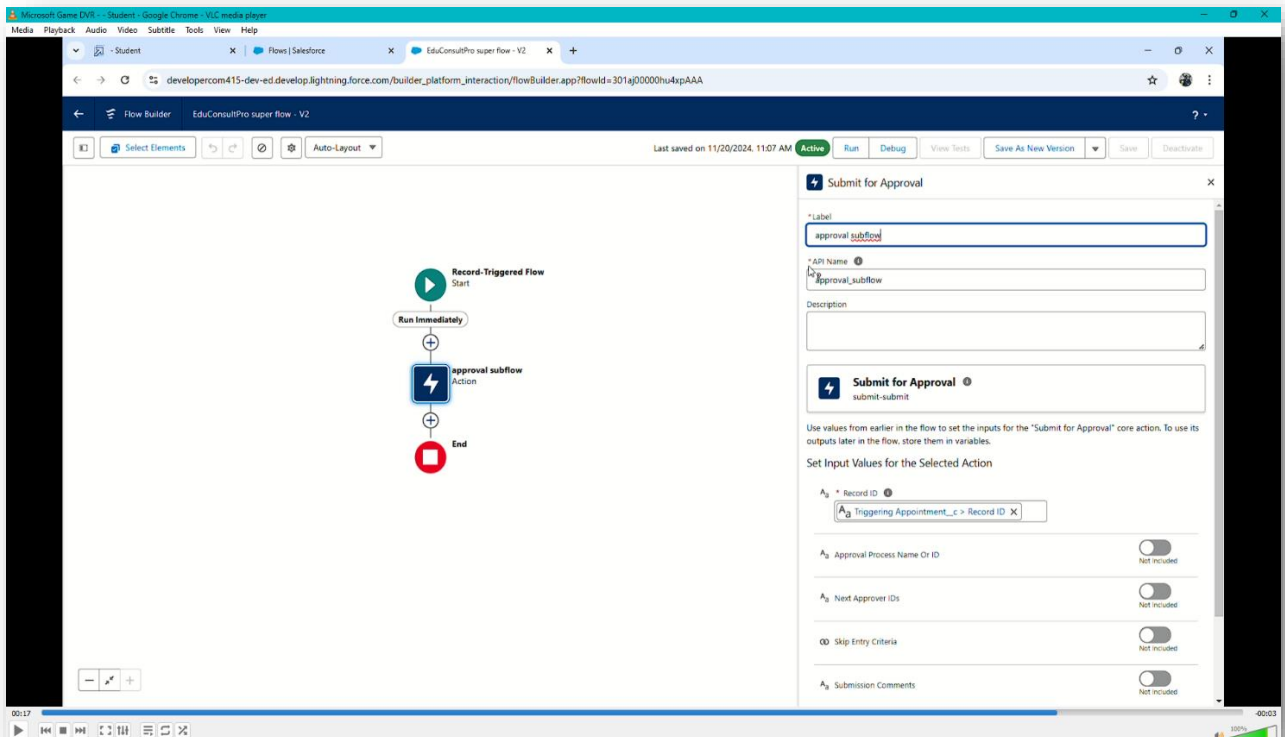


## Create An Approval Process:

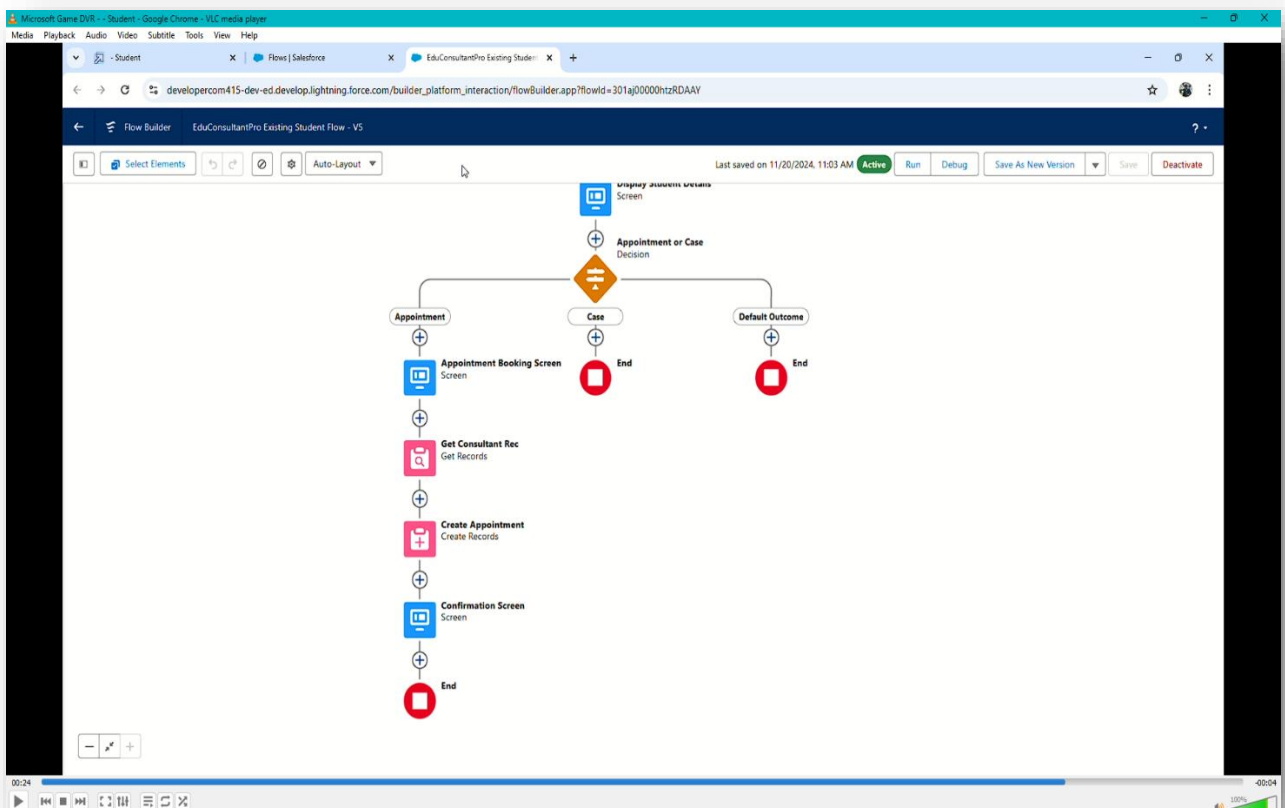
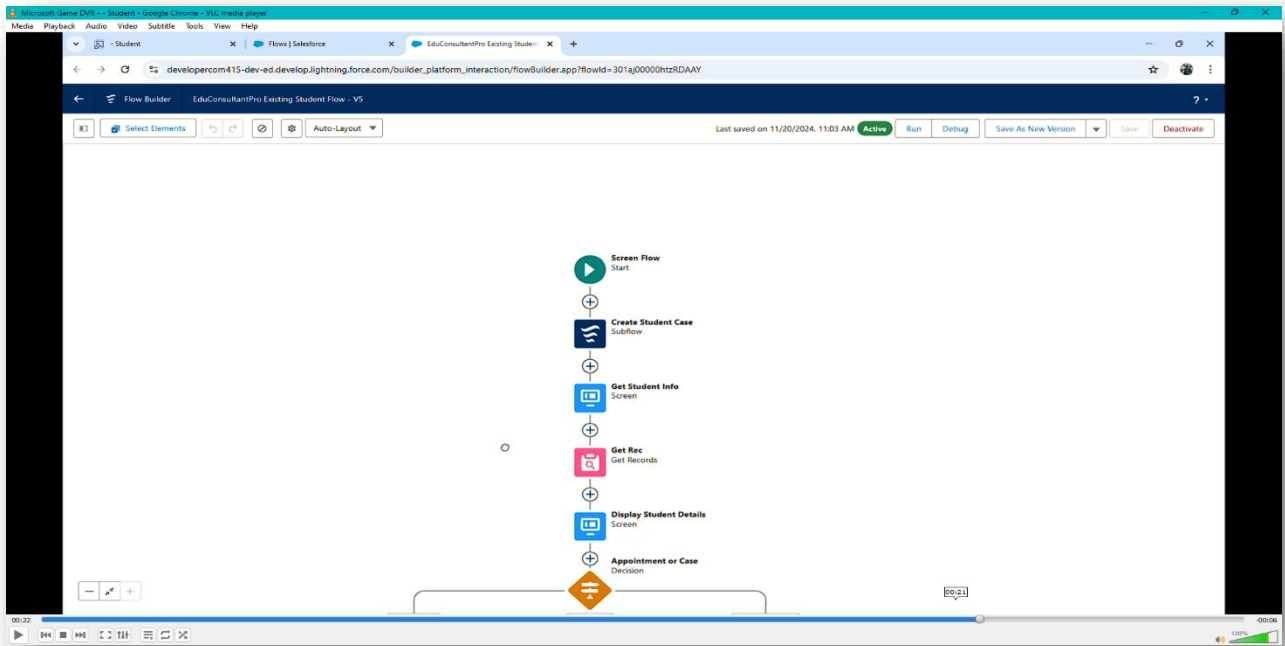




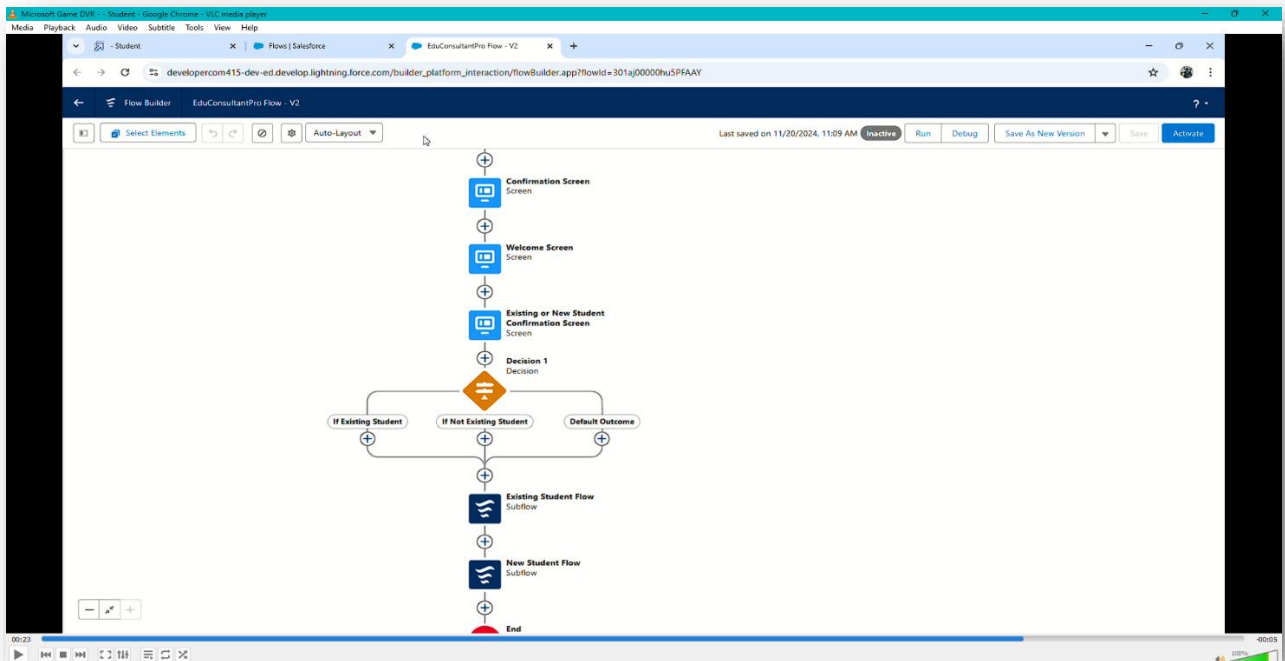
## Add An Action Element:



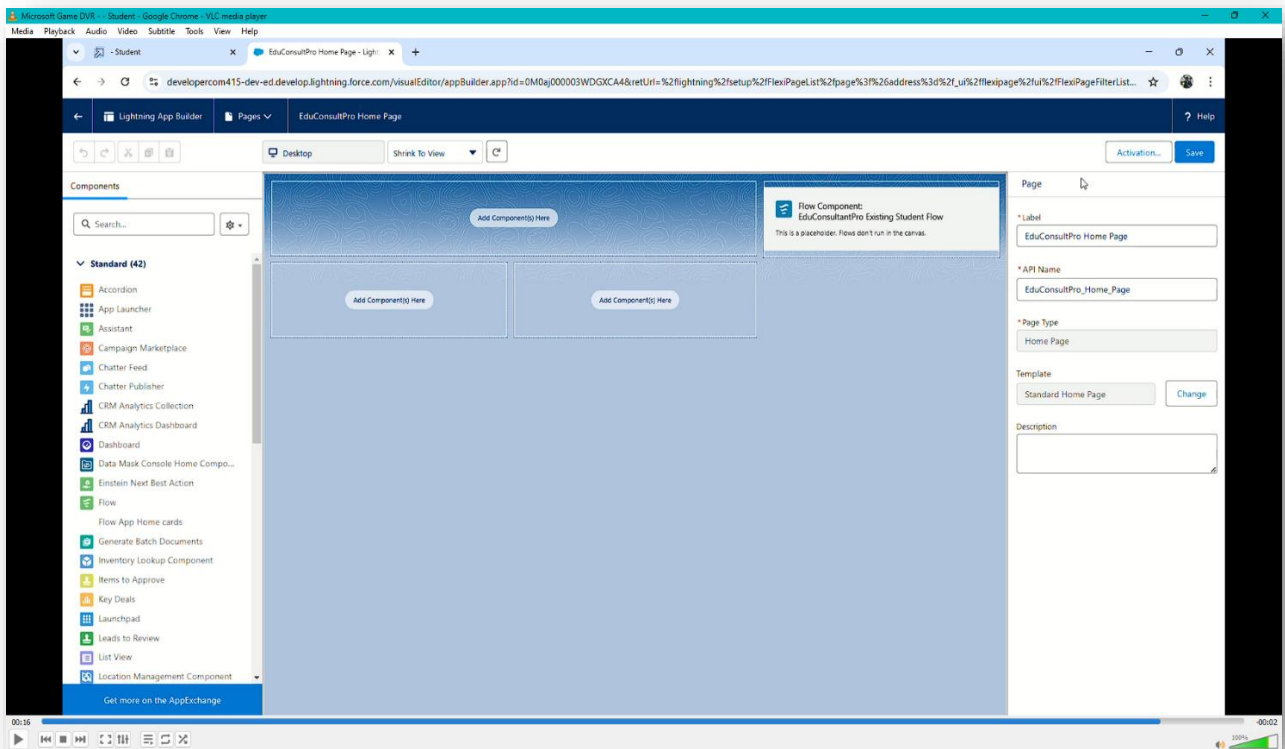
## Create An Screenflow For Existing Student To Book An Appointment:



## Create A Screenflow To Combine All The Flows At Once Place:



## Create A Lightning App Page:



## 5. Technology Stack

- Platform: Salesforce CRM (Cloud-based)
- Automation & Workflow Tools:
  - Salesforce Flow for complex automation.
  - Process Builder for simpler workflows.
- Communication & Marketing Tools:
  - Salesforce Marketing Cloud or Email Studio for targeted communication and engagement.
  - Salesforce Service Cloud for case management and service automation.
- Reporting & Analytics:
  - Salesforce Reports and Dashboards for data visualization and performance tracking.
- Integration Tools:
  - Salesforce AppExchange for third-party integrations (payment processors, SMS/email gateways)

- Salesforce APIs for custom integrations with external systems.
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## **6. Timeline & Milestones**

- Phase 1: Requirements Gathering & Analysis (3-4 weeks)
  - Identify key services, data, and workflows to be automated.
  - Meet with stakeholders to finalize CRM features and configurations.
- Phase 2: Design & Configuration (4-6 weeks)
  - Design CRM structure, including custom objects, fields, and layouts.
  - Set up automation processes, workflows, and integrations.
- Phase 3: Development & Customization (6-8 weeks)
  - Implement necessary customizations, including custom objects, workflows, and email templates.

- Develop and integrate reporting tools and dashboards.
  - Phase 4: Testing (3-4 weeks)
    - Conduct UAT (User Acceptance Testing) to ensure functionality.
    - Perform integration testing with third-party services.
  - Phase 5: Deployment & Training (2-3 weeks)
    - Deploy the CRM to production.
    - Provide training to staff members on how to use the platform effectively.
  - Phase 6: Post-Deployment Support & Optimization (Ongoing)
    - Monitor system performance, resolve bugs, and optimize workflows.
    - Regularly update the CRM with new features or improvements.
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## **7. Budget Estimate**

- Development Costs:
    - Salesforce licenses, configuration, and customization.
    - Development of workflows, reports, and integrations.
  - Training & Support:
    - Costs for training internal staff and providing post-launch technical support.
  - Third-Party Integrations:
    - Subscription costs for third-party services (email gateways, payment processing, etc.).
  - Ongoing Maintenance:
    - Periodic updates, enhancements, and system optimizations.
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## 8. Success Metrics

- **Improved Service Delivery:** Faster response times, more efficient appointment scheduling, and issue resolution.
  - **Client Satisfaction:** Increased client engagement, higher service satisfaction scores, and more positive feedback.
  - **Operational Efficiency:** Reduced manual work, fewer errors in service management, and optimized workflows.
  - **Revenue Growth:** Better tracking of service utilization and billing, leading to increased revenue generation and reduced service delivery costs.
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## Conclusion:

The implementation of a Salesforce-based CRM system to manage the services offered by an institution presents a significant opportunity to streamline operations, enhance service delivery, and improve client satisfaction. By leveraging Salesforce's powerful features—such as automation, client management, real-time reporting, and integration capabilities—the institution can effectively manage its service offerings, optimize client interactions, and automate workflows.

