

# Project Report Template

## 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.

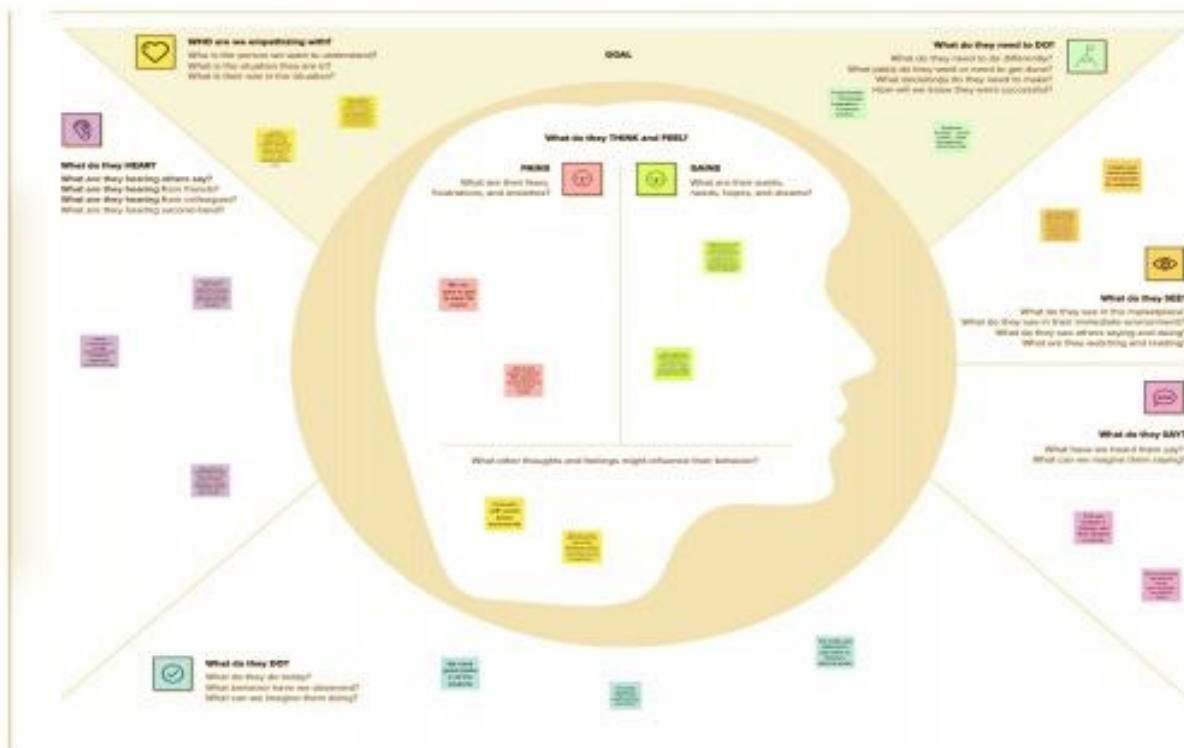
#### 1.2 PURPOSE

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.

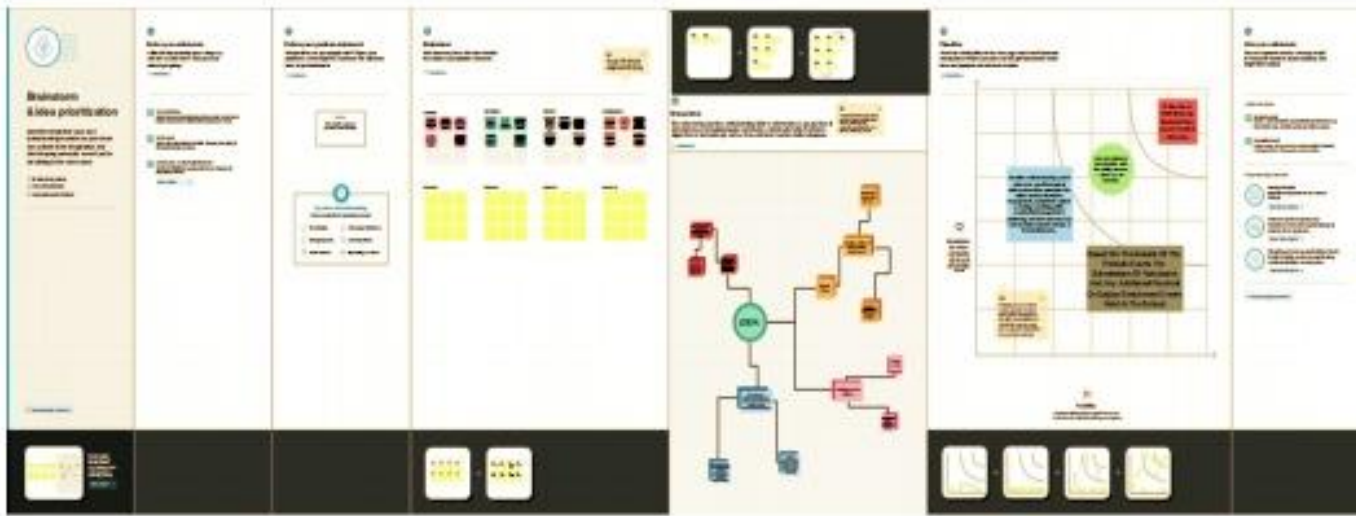
### 2 Problem Definition & Design Thinking

#### 2.1 Empathy Map

2.1 Empathy Map Canvas



## 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

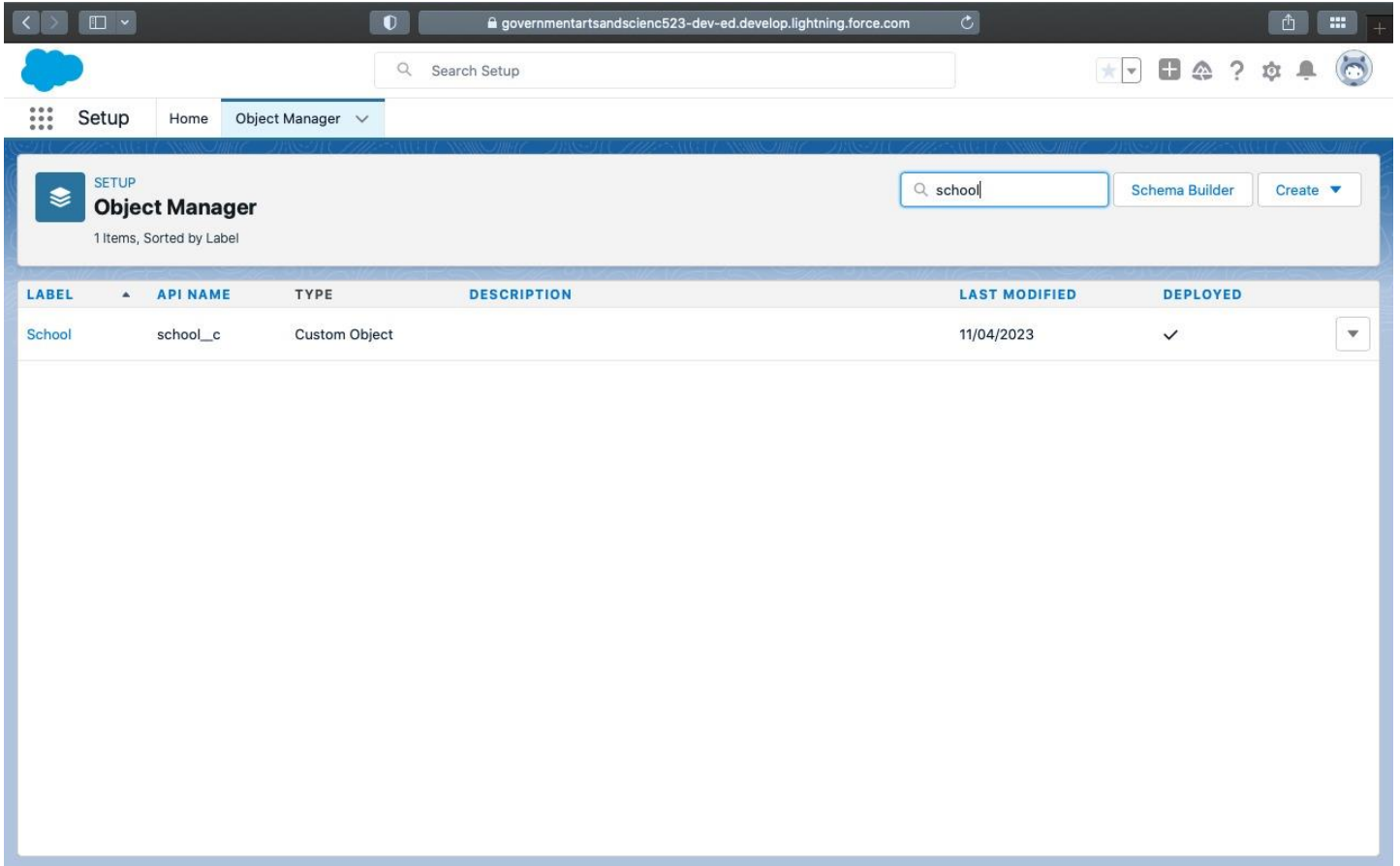
Object name	Fields in the Object	
Student		
	Field Label	Data Type
	Phone number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent		
	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

## 3.2 Activity & Screenshot

(Milestone-2:OBJECT)

### Activity-1 : Creation of School Object

#### # Creation of Object for School Management



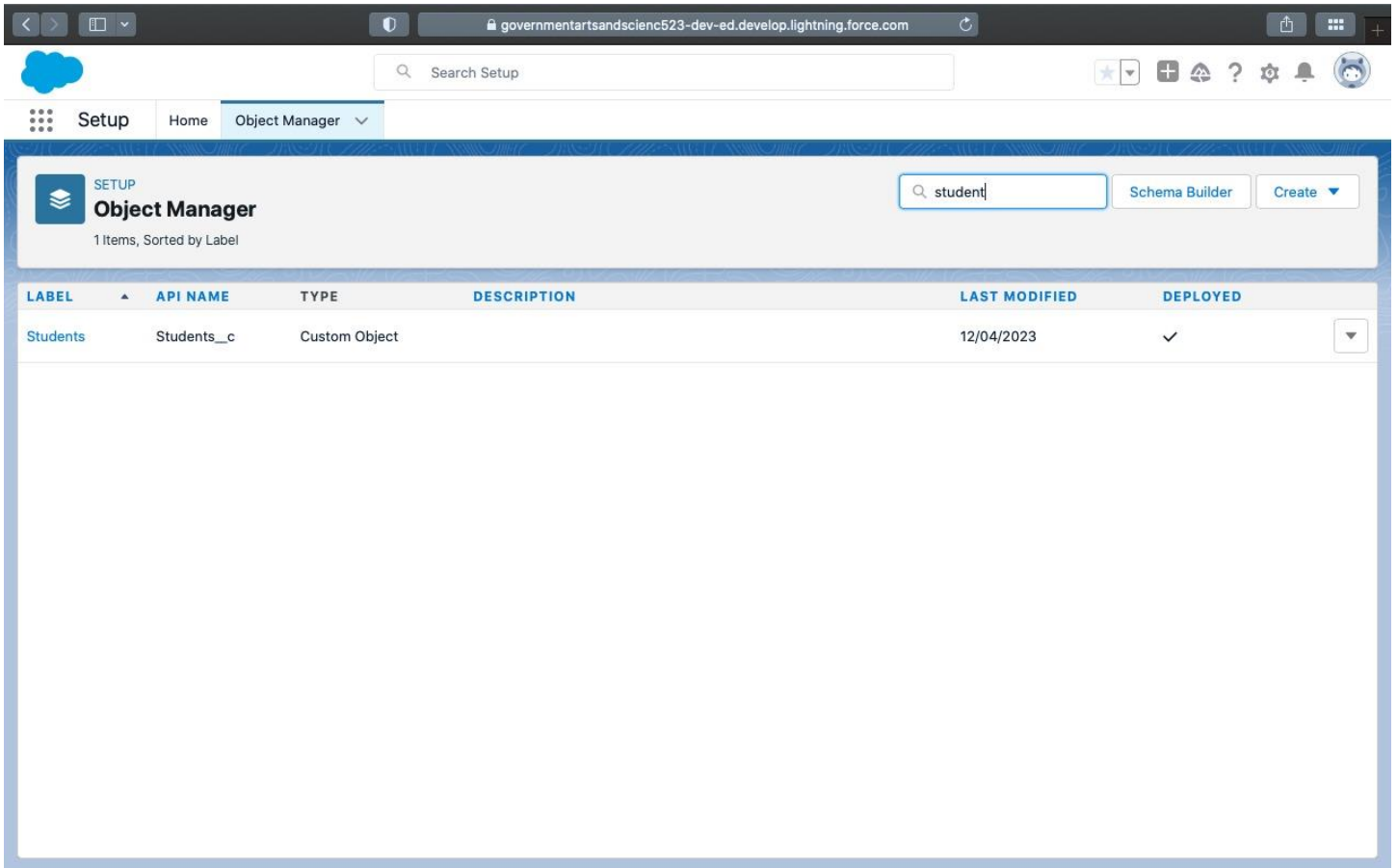
The screenshot displays the Salesforce Setup interface, specifically the Object Manager section. The browser address bar shows the URL: `governmentartsandscienc523-dev-ed.develop.lightning.force.com`. The Setup navigation bar includes links for Setup, Home, and Object Manager. The Object Manager header shows a search bar with the text "school", a "Schema Builder" button, and a "Create" button. Below the header, a table lists the custom 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", TYPE "Custom Object", LAST MODIFIED "11/04/2023", and DEPLOYED status "✓".

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	school__c	Custom Object		11/04/2023	✓

( Milestone-2:OBJECT )

## Activity-2 : Create Student Object

### # Creation of Student Object



The screenshot displays the Salesforce Object Manager interface. At the top, the browser address bar shows the URL: `governmentartsandscienc523-dev-ed.develop.lightning.force.com`. The Salesforce navigation bar includes the 'Setup' link and a search bar with the text 'Search Setup'. The 'Object Manager' tab is selected in the top navigation menu.

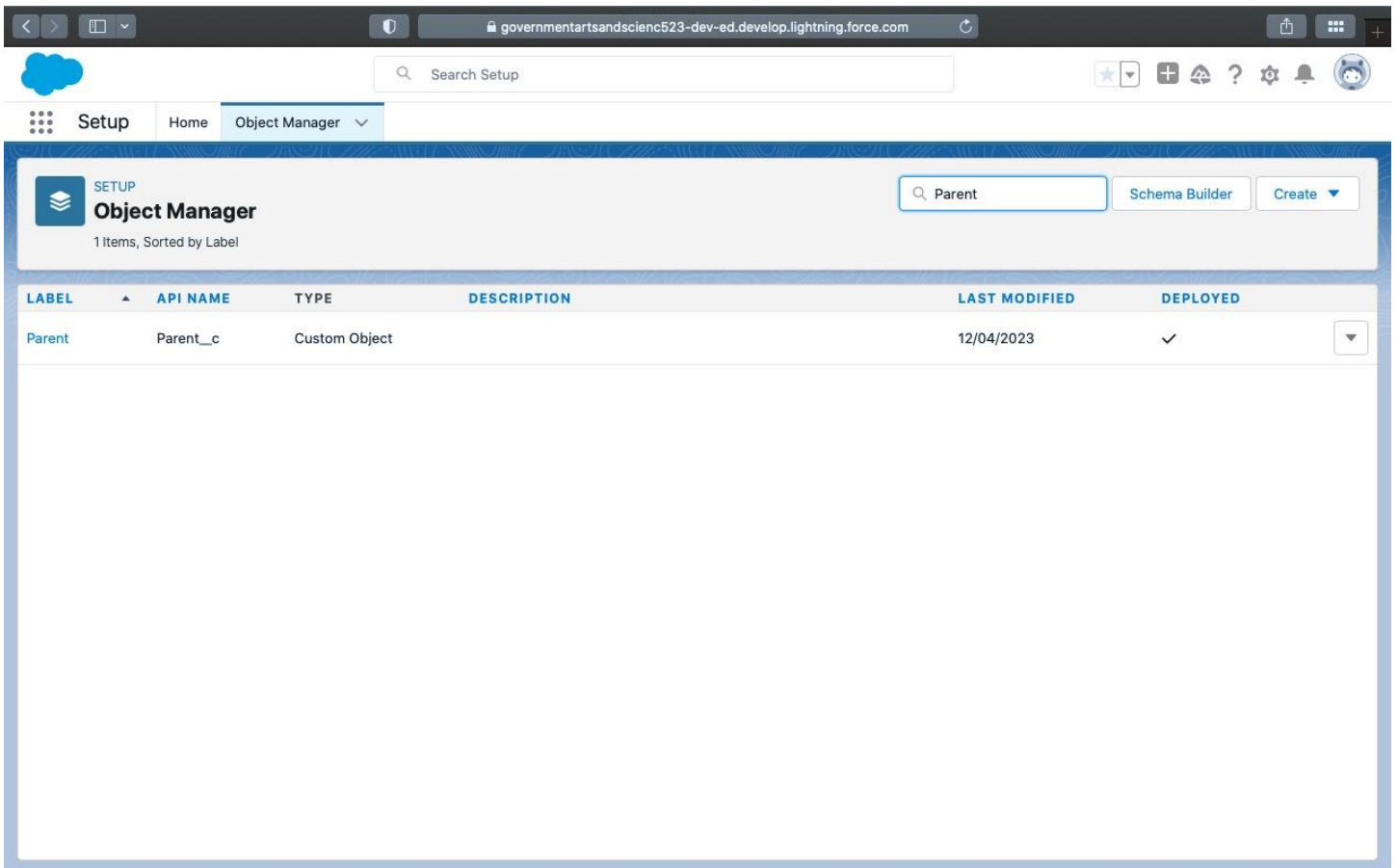
The main content area is titled 'Object Manager' and shows '1 Items, Sorted by Label'. A search bar contains the text 'student'. To the right of the search bar are buttons for 'Schema Builder' and 'Create'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Students	Students__c	Custom Object		12/04/2023	✓

## ( Milestone-2: OBJECT )

### Activity-2 : Create Parent Object

#### # Creation of Parent Object



The screenshot displays the Salesforce Object Manager interface. At the top, there is a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected. Below the navigation bar, the 'Object Manager' section is visible, showing a search bar with the text 'Parent' and 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'. The table contains one row for the 'Parent' object, which is a 'Custom Object' created on '12/04/2023' and is 'DEPLOYED' (indicated by a checkmark). The table is sorted by 'Label'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		12/04/2023	✓

## ( Milestone-3: LIGHTNING APP )

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

#### # Creation School Management App

The screenshot displays the Salesforce Lightning App Builder interface. The browser address bar shows the URL: `governmentartsandscienc523-dev-ed.develop.lightning.force.com`. The top navigation bar includes tabs for **Setup**, **Home**, and **Object Manager**. A search bar labeled "Search Setup" is present. On the left, a sidebar menu lists various categories: **Apps**, **Items**, **Assistant**, **Salesforce Mobile App**, **Lightning Usage**, **Optimizer**, **ADMINISTRATION** (with sub-items: Users, Data, Email), **PLATFORM TOOLS** (with sub-items: Subscription Management, Apps, Feature Settings, Slack, MuleSoft), and a "More" option. A search filter "School Management" is applied, showing results under the **Apps** category. The main content area features three cards: **Get Started with Einstein Bots**, **Mobile Publisher**, and **Real-time Collaborative Docs**. Below these is a section titled **Most Recently Used** with 10 items. The table below lists the items:

NAME	TYPE	OBJECT
Parent	Custom Object Definition	
Students	Custom Object Definition	
School	Custom Object Definition	

## ( Milestone-4: FIELDS & RELATIONSHIP )

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

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

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar contains a navigation menu with options like 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, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The 'Fields & Relationships' section is selected, displaying a table of 11 fields. The table has columns for the field name, API name, and data type. Fields include Address, Created By, District, Last Modified By, Owner, Phone Number, Phone number, School, school Name, and State. Some fields have a checkmark in the 'Field Dependencies' column, indicating they are required for certain operations. The 'Owner' field is marked as required for 'Lookup(User,Group)' and the 'school Name' field is marked as required for 'Lookup(User,Group)'.

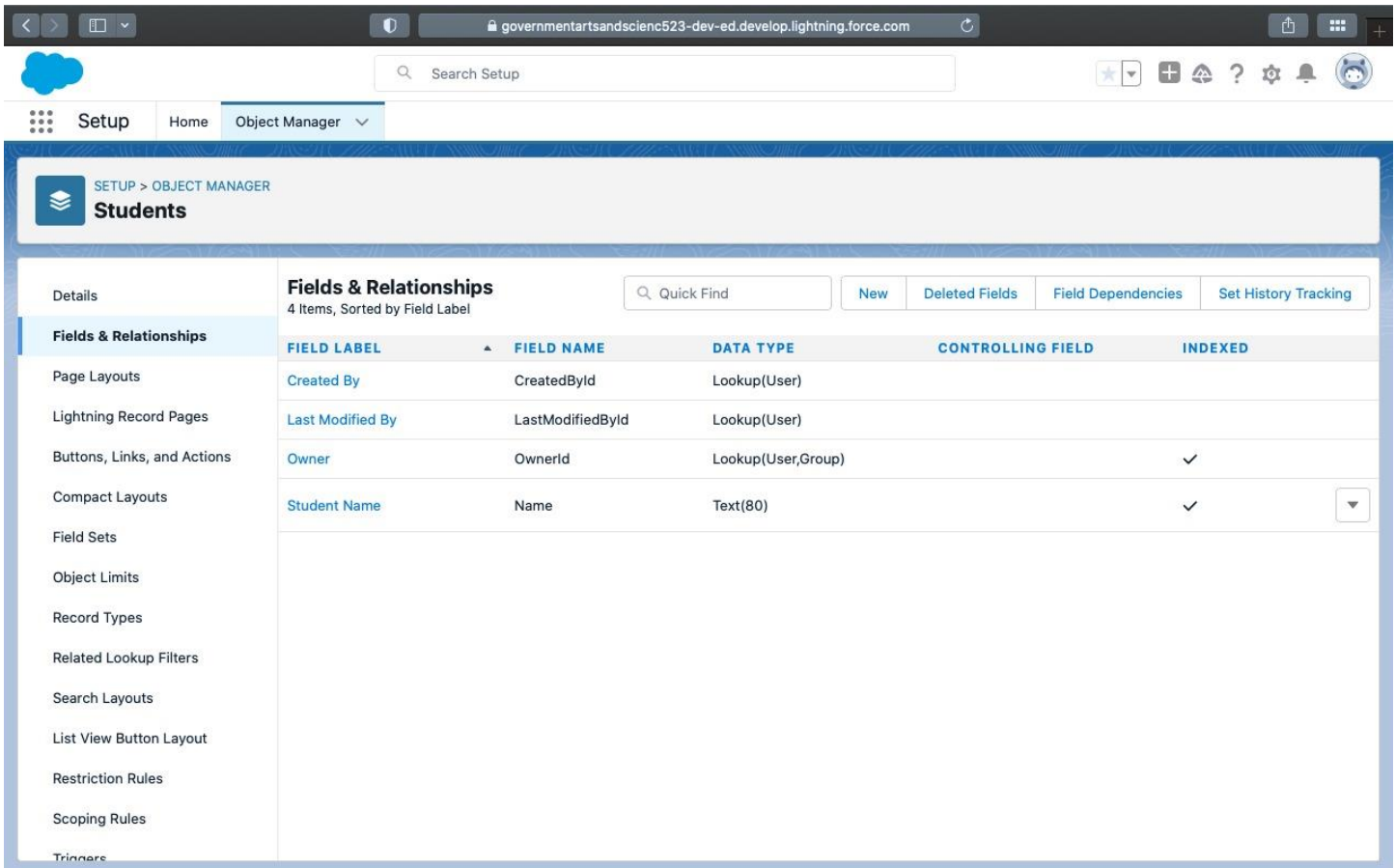
Field Name	API Name	Data Type	Field Dependencies
Address	Add__c	Text Area(255)	
Address	Address__c	Text Area(255)	
Created By	CreatedById	Lookup(User)	
District	District__c	Text Area(255)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Phone Number	Phone_Numbers__c	Phone	
Phone number	Phone_number__c	Phone	
School	School__c	Text Area(255)	
school Name	Name	Text(80)	✓
State	State__c	Text Area(255)	



## ( 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 Setup interface for the 'Students' object. The left sidebar contains a navigation menu with options like 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, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Students' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are four fields listed: 'Created By' (Lookup(User)), 'Last Modified By' (Lookup(User)), 'Owner' (Lookup(User,Group)), and 'Student Name' (Text(80)). The 'Student Name' field is highlighted with a blue background. Above the table, there are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A search bar labeled 'Quick Find' is also present.

SETUP > OBJECT MANAGER  
**Students**

Details

**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)		✓
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 Setup interface. The browser address bar displays 'governmentartsandscienc523-dev-ed.develop.lightning.force.com'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Parent' and shows the 'Fields & Relationships' section. A sidebar on the left lists various setup options, with 'Fields & Relationships' currently selected. The main table lists four fields: 'Created By', 'Last Modified By', 'Owner', and 'Parent Name'. The 'Parent Name' field is highlighted in blue. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The 'Parent Name' field is a Text(80) type and is indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Name	Name	Text(80)		✓

## ( Milestone-5: PROFILE )

### Activity-1 : Creation on Profile

#### # Creation on Profiles

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Transition Assistant  
Move to the new, more productive Salesforce.  
[Get Started](#)

**Salesforce Mobile Quick Start**

**Home**

**Administer**

- Release Updates
- ☒ **Manage Users**
  - Users
  - Mass Email Users
  - Roles

## Profiles

Help for this Page

All Profiles [Create New View](#)

[New Profile](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | **S** | T | U | V | W | X | Y | Z | Other | All

<input type="checkbox"/>	Action	Profile Name ↑	User License	Custom
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Salesforce API Only System Integrations</a>	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del...</a>	<a href="#">School profile</a>	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

1-7 of 7 0 Selected

Page 1 of 1

## ( Milestone-6: USERS )

### Activity-1 : Creating a Users

#### # Creating a Users

It's Better in Lightning  
Move to Lightning Experience and give your users a productivity boost.

Quick Find / Search...  
Expand All | Collapse All

Lightning Experience Transition Assistant  
Move to the new, more productive Salesforce.  
Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Users

Mass Email Users

Roles

Permission Sets

Permission Set Groups

User Management Settings

Profiles

Public Groups

### All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000by0t7eal.3ugrwmnouyil@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	K. Arun	AK	arun@govt.sandbox		✓	System Administrator
<input type="checkbox"/> Edit	S. PARENT	ps	parentsalpha@gmail.com		✓	School profile
<input type="checkbox"/> Edit	S. PRINCIPAL	ps	principalsalpha@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	S. TEACHER	ts	teachersalpha@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5i00000by0t7eal.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5i00000by0t7eal.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## ( Milestone-7: PERMISSION SETS )

### Activity-1 : Permission sets 1:

#### # To Set Permissions

The screenshot shows the Salesforce interface for managing Permission Sets. The browser address bar displays the URL: `governmentartsandscienc523-dev-ed.develop.my.salesforce.com`. The page header includes the Salesforce logo, a search bar, and navigation links for "Switch to Lightning Experience", "Arun K", "Setup", "Help", and "Content". The main navigation bar lists "Home", "Chatter", "Libraries", "Content", "Subscriptions", "Schools", "Students", and "Parents". A banner at the top promotes the Lightning Experience with the text "It's Better in Lightning" and buttons for "Tell Me More" and "Check Readiness".

The left sidebar contains a "Quick Find / Search..." bar, a "Lightning Experience Transition Assistant" section with a "Get Started" button, and a "Salesforce Mobile Quick Start" section. Below these are links for "Home" and "Administer", which includes "Release Updates", "Manage Users" (with sub-links for "Users" and "Mass Email Users"), and "Roles".

The main content area is titled "Permission Sets" and includes a "Help for this Page" link. It contains the following text:

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

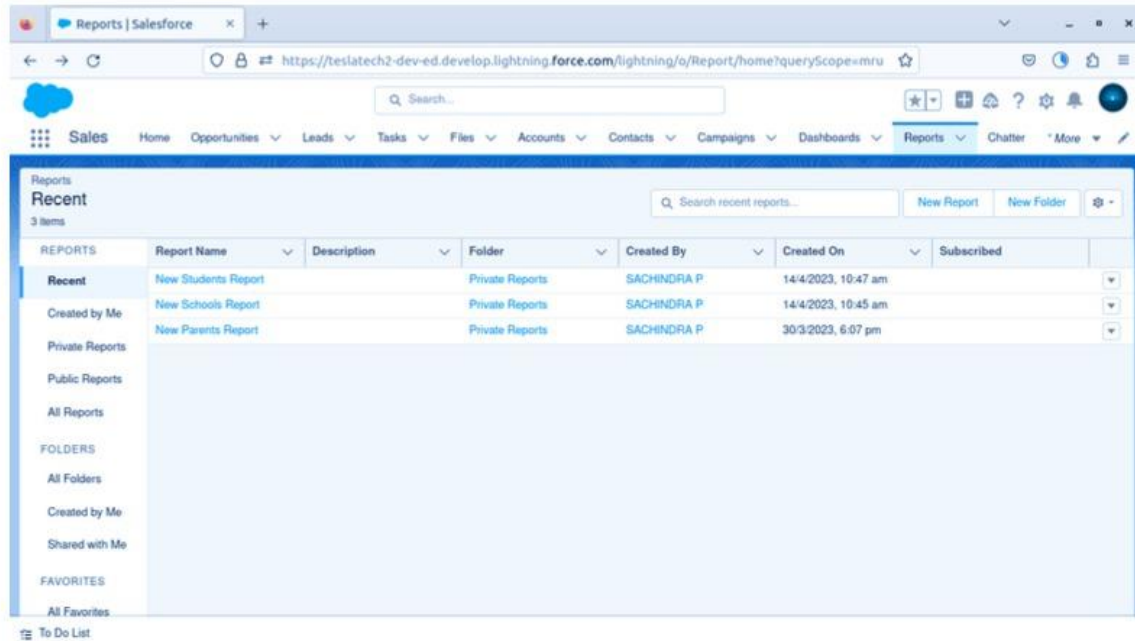
Below the text is a table of permission sets. The table has columns for "Action", "Permission Set Label", "Description", and "License". The table is currently empty, showing only a header row. Above the table, there are links for "All Permission Sets", "Edit", "Delete", and "Create New View".

At the bottom of the page, there is a pagination bar showing "1-1 of 1", "0 Selected", and navigation links for "Previous" and "Next". The page number "Page 1 of 1" is also displayed.

## ( Milestone-8: REPORTS )

### Activity-1 : Reports

#### # Reports



## 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/arunk327>

Team Member 1 - <https://trailblazer.me/id/divyt13>

Team Member 2- <https://trailblazer.me/id/mmurugan40>

Team Member 3 - <https://trailblazer.me/id/kathm26>

## 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. BWM 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.

