A CRM Application for Schools/Colleges

1. INTRODUCTION

1.1 Overview

- A CRM (customer relationship management) application for schools and colleges is a software solution designed to help educational institutions manage their relationships with students, parents, alumni, faculty, staff, and other stakeholders.

- It provides a centralised platform for collecting, organising, and analysing data related to these relationships, with the goal of improving student outcomes, increasing efficiency, and enhancing communication.

1.2 Purpose

- Improve student outcomes

- Increase efficiency

- Enhance communication

- Optimise resource usage

- Analyse performance

- A CRM application for schools and colleges can help these institutions achieve their mission of providing high-quality education to students, while also increasing efficiency and enhancing communication with all stakeholders.
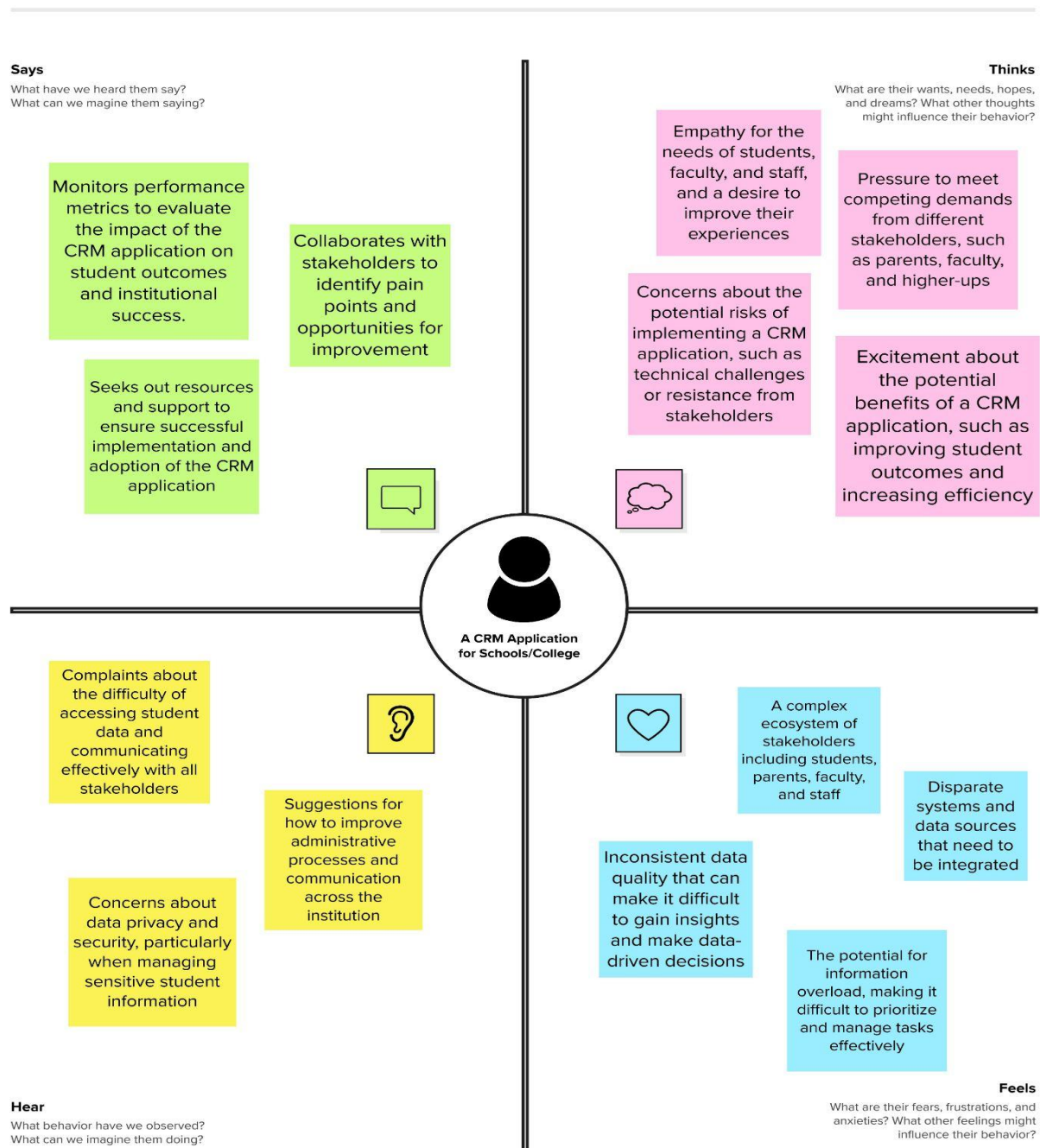
2.PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map

Build empathy

Empathy map for user

Says
What have we heard them say?
What can we imagine them saying?

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Monitors performance metrics to evaluate the impact of the CRM application on student outcomes and institutional success.

Collaborates with stakeholders to identify pain points and opportunities for improvement

Seeks out resources and support to ensure successful implementation and adoption of the CRM application

Empathy for the needs of students, faculty, and staff, and a desire to improve their experiences

Pressure to meet competing demands from different stakeholders, such as parents, faculty, and higher-ups

Concerns about the potential risks of implementing a CRM application, such as technical challenges or resistance from stakeholders

Excitement about the potential benefits of a CRM application, such as improving student outcomes and increasing efficiency

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Complaints about the difficulty of accessing student data and communicating effectively with all stakeholders

Suggestions for how to improve administrative processes and communication across the institution

Concerns about data privacy and security, particularly when managing sensitive student information

A complex ecosystem of stakeholders including students, parents, faculty, and staff

Disparate systems and data sources that need to be integrated

Inconsistent data quality that can make it difficult to gain insights and make data-driven decisions

The potential for information overload, making it difficult to prioritize and manage tasks effectively

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

Hear
What behavior have we observed?
What can we imagine them doing?

2.2 Ideation & Brainstorming Map

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

🕐 **10 minutes** to prepare

⏳ **1 hour** to collaborate

👤 **2-5 people** recommended

Date	19.03.2023
Team ID and Members	ID:NM2023TMID21118 Leader: Aysha Thahaseen F Members: Rathipraba S Shreelhekha T Suruthi D Swetha H
Project	A CRM Appilcation for Schools/college

→

Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕐 **10 minutes**

A	**Team gathering**
	Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B	**Set the goal**
	Think about the problem you'll be focusing on solving in the brainstorming session.

C	**Learn how to use the facilitation tools**
	Use the Facilitation Superpowers to run a happy and productive session.

Open article →

1

A CRM Application For Schools/College

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕐 **5 minutes**

2

Brainstorm

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Presentation are given by every members
in the team

🕐 10minutes

Aysha Thahaseen F

The CRM would allow schools and colleges to maintain detailed profiles of each student, including personal information, academic records, attendance records, and extracurricular activities.	The CRM would enable schools and colleges to communicate with students, parents, and faculty members via email, SMS, or push notifications. This would include features such as mass messaging, automated reminders, and scheduling tools.	The CRM could be used to attract and recruit new students by creating targeted campaigns, managing leads, and tracking enrollment progress.	The CRM could be used to attract and recruit new students by creating targeted campaigns, managing leads, and tracking enrollment progress.

Rathipraba S

The CRM could be used to plan and manage school events, such as parent-teacher conferences, extracurricular activities, and fundraisers	The CRM would provide schools and colleges with detailed reports and analytics on various aspects of student performance, communication, and engagement.	The CRM could be used to maintain relationships with former students, track their achievements, and solicit donations.	The CRM could be used to manage the entire admissions process, from initial inquiries to final acceptances.

Shreelhekha

The CRM could be used to provide students with support services, such as tutoring, counseling, and career guidance.	The CRM could be used to manage financial aid applications, awards, and disbursements.	The CRM could be used to manage relationships with donors, track donations, and provide reports on fundraising efforts.	The CRM could be used to manage course schedules, assignments, and grading.

Suruthi D

The CRM could be used to manage the development and implementation of academic curricula.	The CRM could be used to manage faculty recruitment, contracts, and performance evaluations.	The CRM could be used to manage school resources, such as facilities, equipment, and supplies.	The CRM could be integrated with social media platforms to enable schools and colleges to engage with students and parents on a wider scale.

Swetha H

The CRM could be accessed via mobile devices, allowing students, parents, and faculty members to stay connected and engaged.	The CRM could support multiple languages to accommodate a diverse student population.	The CRM would need to be designed with robust security measures to protect sensitive student and school data.	The CRM could be customized to meet the unique needs of individual schools and colleges, including branding, workflows, and reporting requirements.

3

Group ideas

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Group Ideas are shortly presented

🕐 **20 minutes**

Increase Enrollment:
The marketing and recruitment tools provided by the CRM can help schools and colleges increase their enrollment numbers by reaching out to potential students who may not have been aware of the institution previously. By creating targeted campaigns and managing leads, the CRM can help identify and connect with students who are a good fit for the school or college.

Efficient Management:
The recruitment and enrollment process can be time-consuming and complex. With a CRM application, schools and colleges can manage the entire process more efficiently, from tracking prospective students to managing enrollment progress. This can help reduce administrative workload and streamline the process for everyone involved.

Improve Student Diversity:
With targeted campaigns, the CRM can help schools and colleges attract a more diverse student population. This can help create a more inclusive and dynamic learning environment for all students, and can also increase the institution's appeal to potential donors and supporters.

4

Prioritize

A CRM Application for schools/college Project our team make an presentation for priorities in the project

🕐 **20 minutes**

Salesforce is a leading CRM platform that provides a range of cloud-based tools and services for sales, marketing, customer service, and analytics.

SALESFORCE

A CRM Application for schools/ college

- Salesforce has a strong focus on innovation, with regular updates and releases to the platform to add new features and functionality.
- Salesforce is a leader in the CRM market

1. Student Retention
2. Improved Communication
3. Marketing and Recruitment
4. Administrative Efficiency
5. Data Management
6. Resource Allocation
7. Alumni Relations
8. Compliance
9. Competitive Advantage

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 Student	Roll-up Summary
	Highest Mark	Roll-up Summary
Student	**Field Label**	**Data Type**
	Phone Number	Phone
	School	Master-Detail Relationship
Parents	**Field Label**	**Data Type**
	Parents Address	Text Area
	Parents Number	Phone

3.2 Activity & Screenshot

Project:

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Activities:

Milestone 1 : *Creating Developer Account*
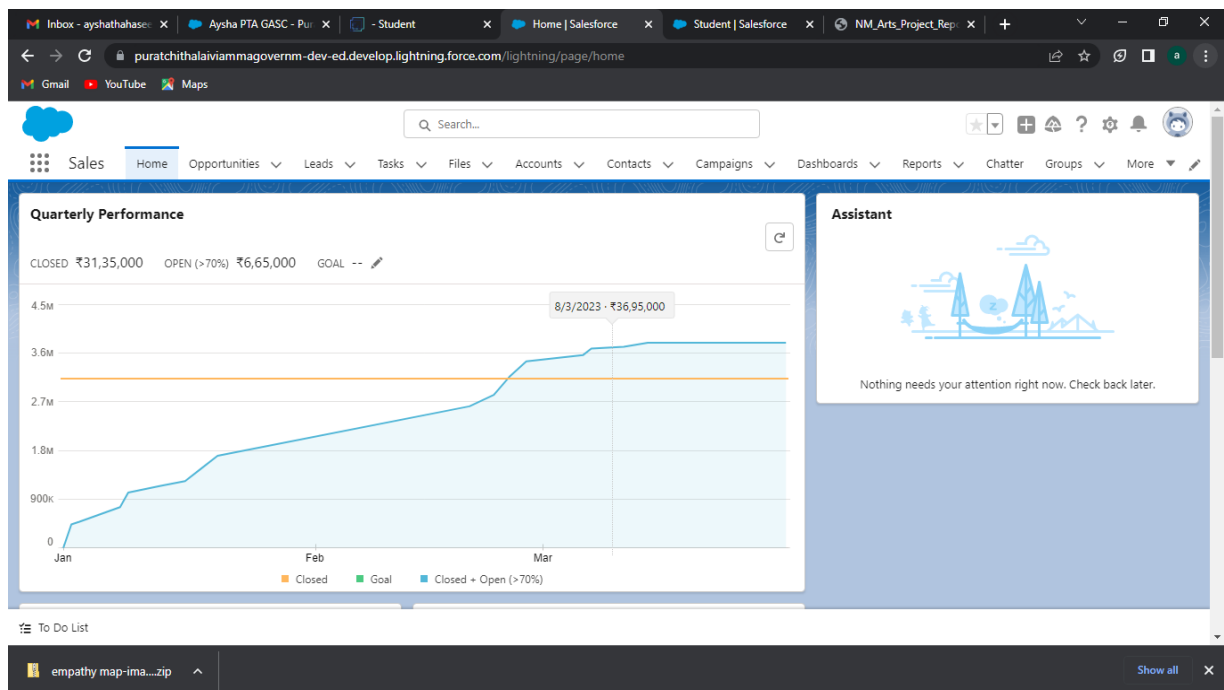
Salesforce is your customer success platform, designed to help you sell, service, market, analyse, and connect with your customers.

Milestone 2 : *Object*

Salesforce objects are database tables that permit you to store data that is specific to an organization.

Activity 1: Creation of School Object

Activity 2 : Creation of Student Object

Activity 3 : Creation of Parent Object
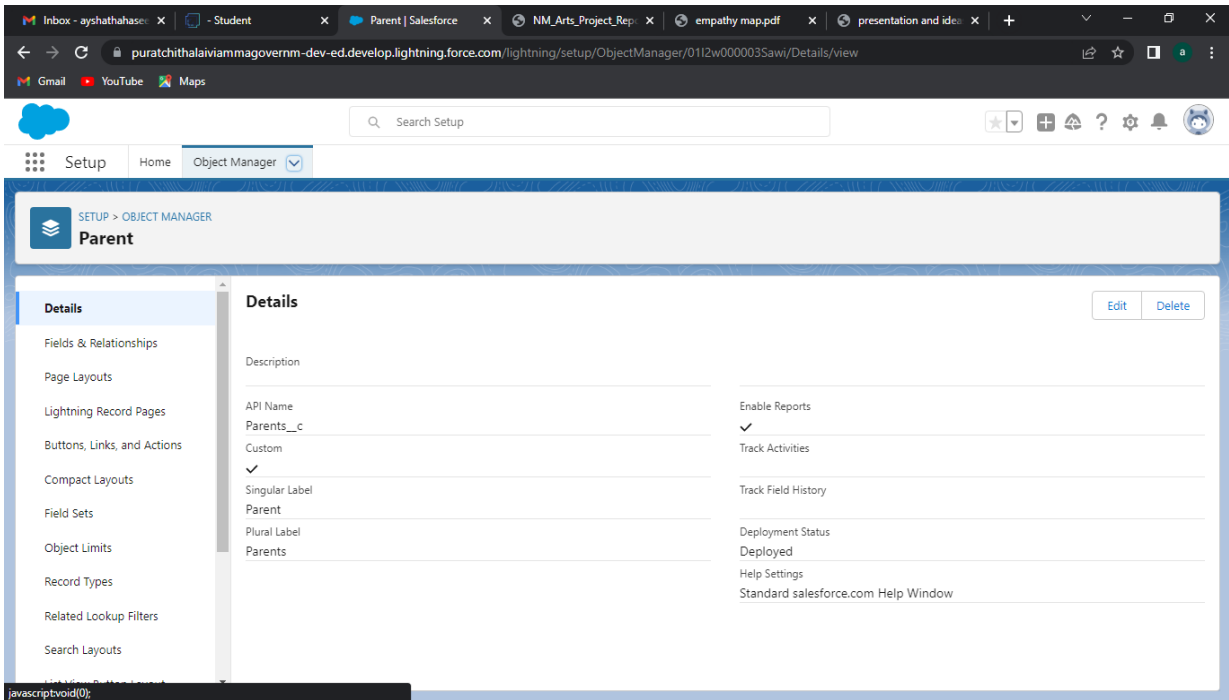
Milestone 3 : *Lightning App*
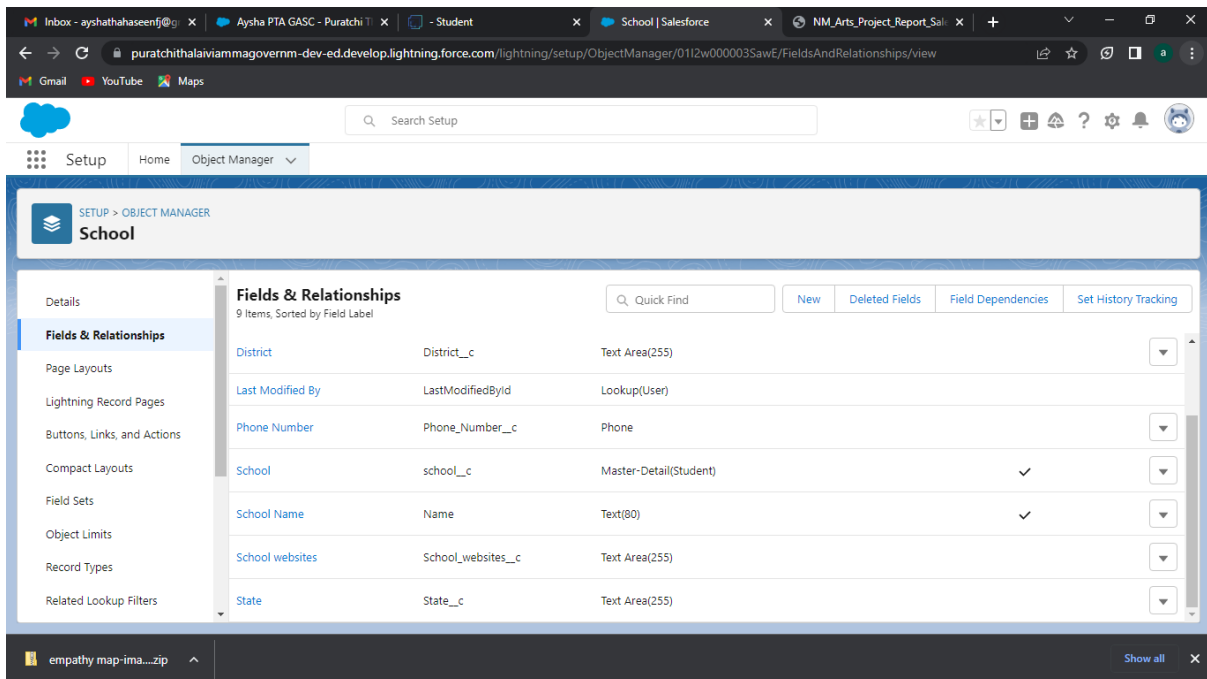
Apps in Salesforce are a group of tabs that help the application function by working together as a unit.
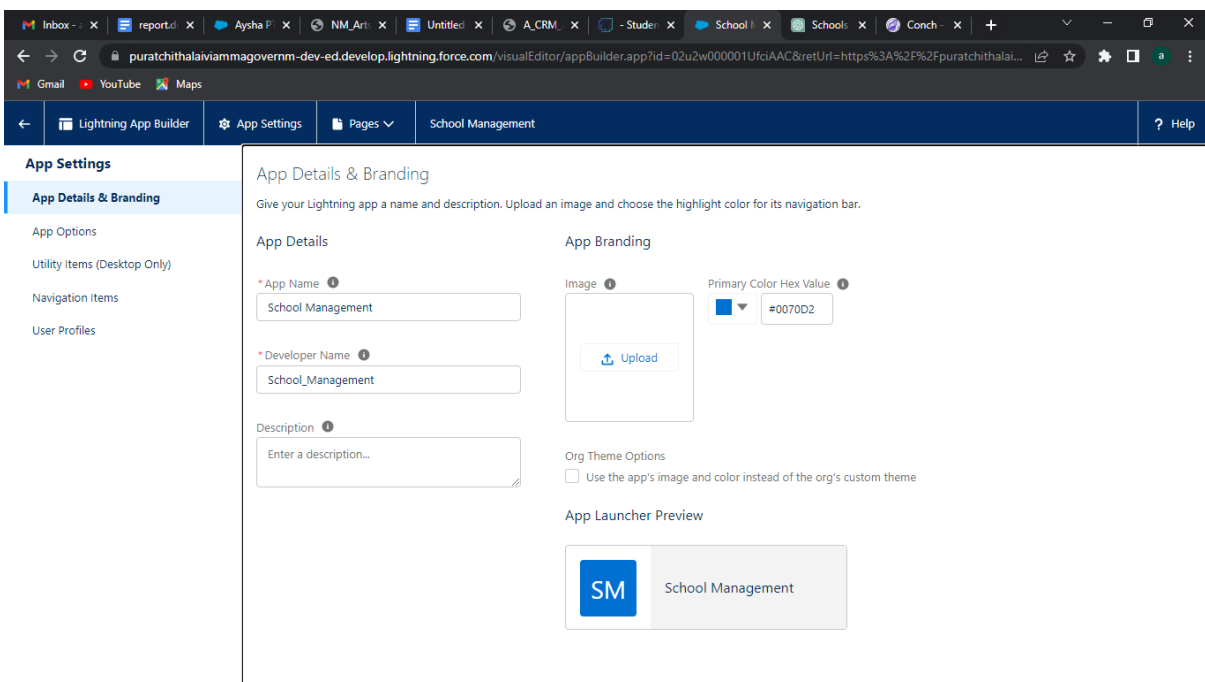
Milestone 4 : *Fields and Relationship*

Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.
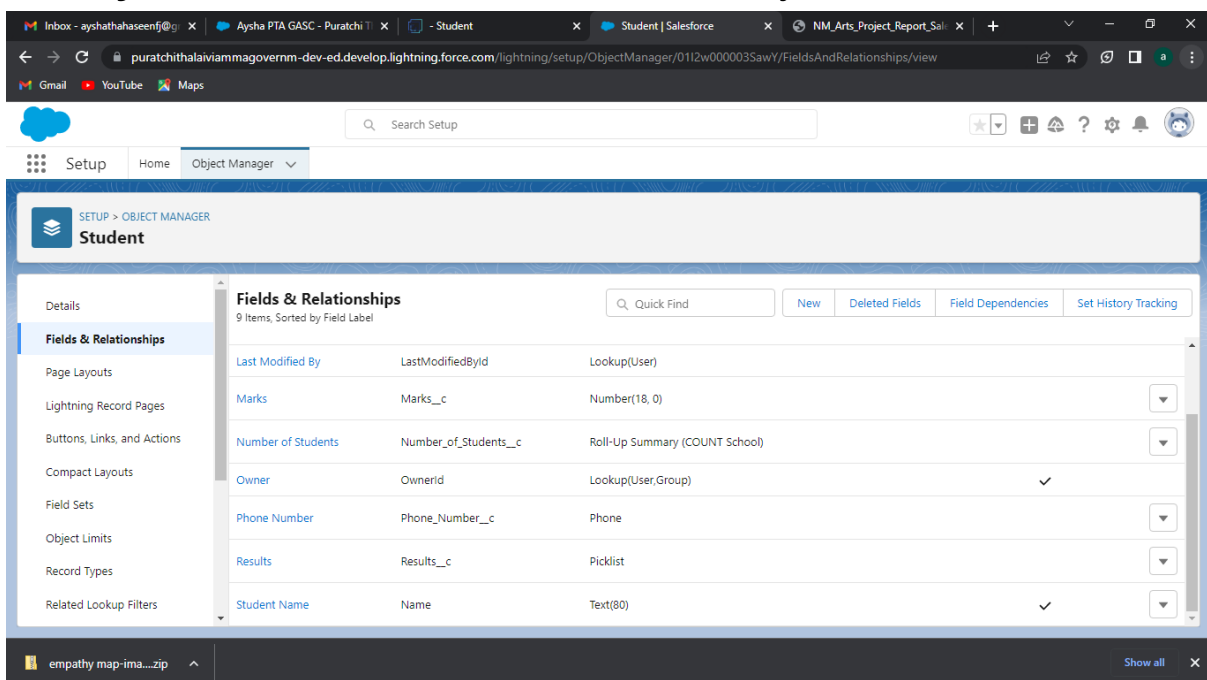
Activity 1 : Creation of Field for the School objects

Activity 2 : Creation of Field for the Student objects

Activity 3 : Creation of Field for the Parent objects

Milestone 5 :*Profile*

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

Activity : Creation on Profile

Milestone 6 : *Users*

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.
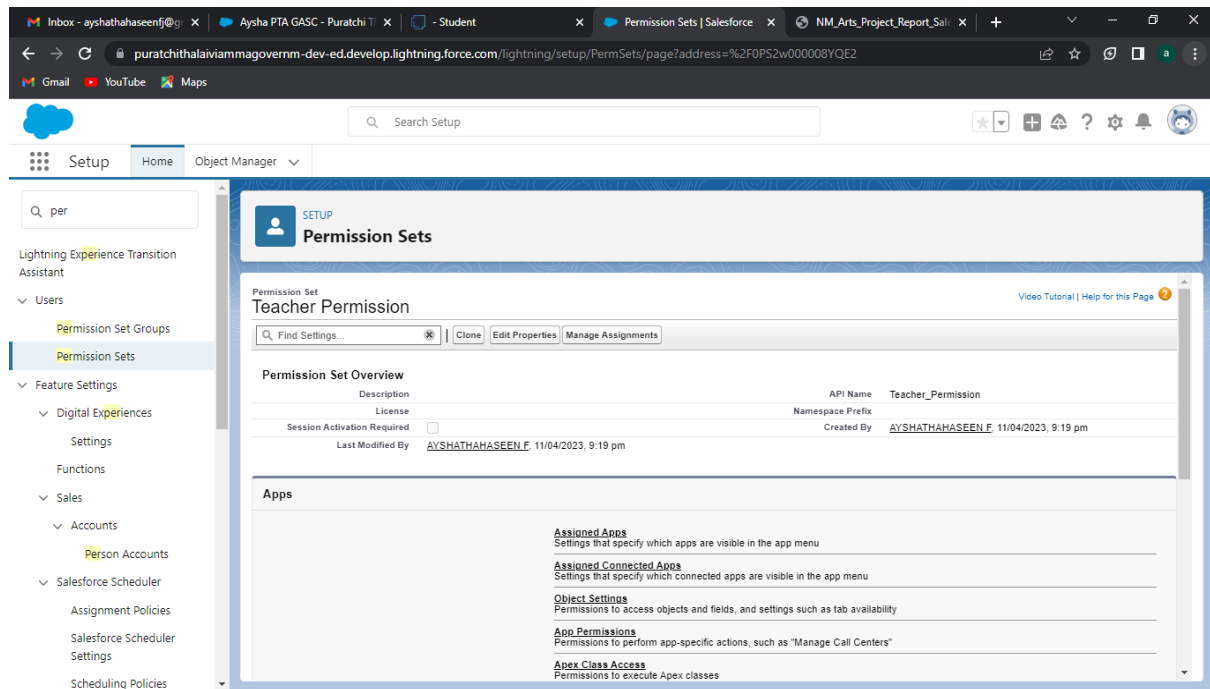
Activity : Creating a users

Milestone 7 :*permission Sets*
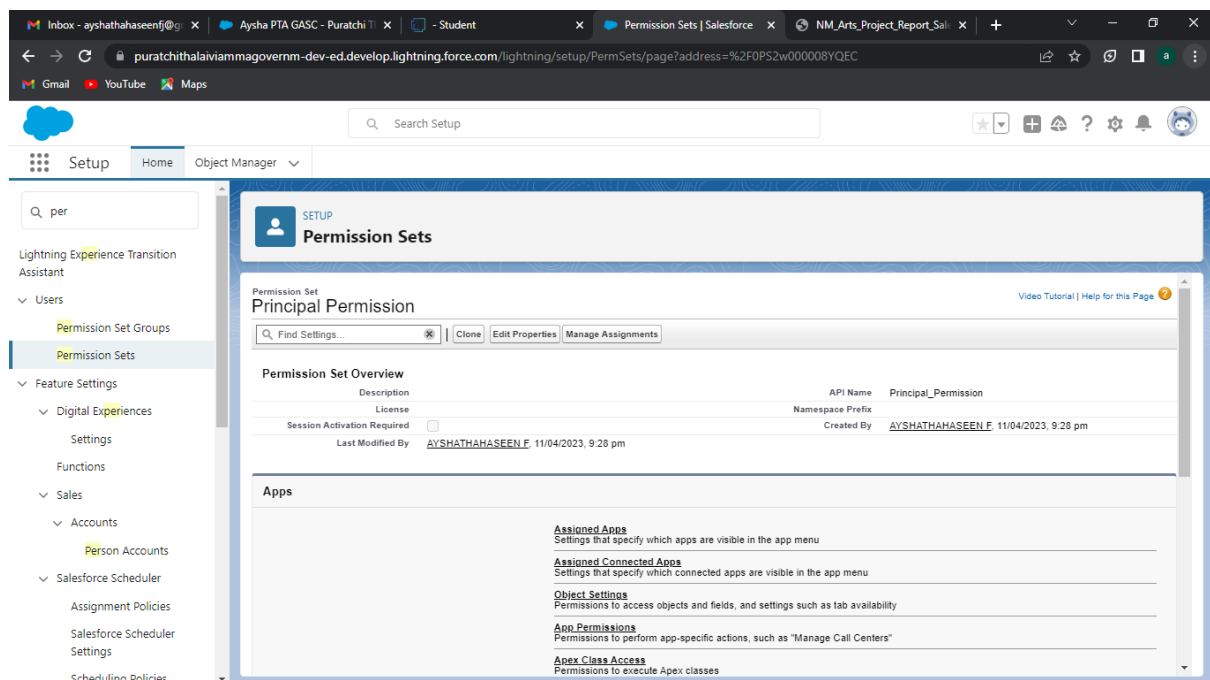
A permission set is a collection of settings and permissions that give users access to various tools and functions.

Activity 1 : Permission Sets 1

Activity 2 : Permission Sets 2

Milestone 8 : *Reports*

A report is a list of records that meet the criteria you define

Activity : Report

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead   - https://trailblazer.me/id/ayshaptagasc01
Team Member 1-https://trailblazer.me/id/raths7
Team Member 2- https://trailblazer.me/id/s20uma007
Team Member 3-https://trailblazer.me/id/surthi
Team Member 4-https://trailblazer.me/id/s20uma009

5.ADVANTAGES & DISADVANTAGE

➜Advantages

- A CRM system can facilitate communication between faculty, staff, students, and parents/guardians.
- With the help of a CRM application, teachers and staff can track student's progress, interests, and feedback.
- A CRM system can streamline administrative processes such as enrollment, fee payment, and scheduling.
- It can provide a wealth of data on a student's academic performance, attendance, and behaviour. .
- This data can be analysed to identify trends, make informed decisions, and improve overall student outcomes.
- A CRM system can provide parents/guardians with real-time updates on their child's academic progress, allowing them to stay more involved in their child's education.

➜ Disadvantage

- Implementing and maintaining a CRM system can be expensive.
- The cost of purchasing and integrating a CRM application, as well as the cost of training staff, can add up
- CRM systems can be complex and require technical expertise to operate. Any technical difficulties could lead to downtime or data loss.A CRM system contains sensitive information about students, faculty, and staff.
- It is essential to ensure that privacy and security protocols are in place to protect this information from unauthorised access.
- Introducing a CRM system to a school/college can be met with resistance from faculty and staff who may be accustomed to traditional methods of communication and record-keeping.

6.APPLICATIONS

- A CRM system can streamline the admissions process by capturing student data, automating the application process, and tracking the status of applications.
- A CRM application can be used to store and manage student records such as attendance, grades, academic progress, and behaviour records.
- A CRM system can provide a platform for communication between faculty, staff, students, and parents/guardians. It can facilitate communication through emails, messages, and notifications.
- A CRM system can help track student requests and inquiries related to student services such as counselling, academic advising, and career services.

7.CONCLUSION

- A CRM application for schools and colleges can provide many benefits, including improved communication, streamlined administrative processes, better data management, and improved customer service.
- schools and colleges must be aware of the potential drawbacks, such as cost and privacy concerns, and take steps to mitigate these risks.
- By using a CRM application, schools and colleges can improve their relationships with students, staff, and parents, leading to better academic outcomes and a more engaged school community.

8.FUTURE SCOPE

- As the education industry continues to evolve and become more competitive, institutions will increasingly look for ways to differentiate themselves by providing exceptional customer service and engagement.

- The future scope of a CRM application is in data analytics.

- As schools and colleges collect more data on students, staff, and parents, they will need tools to analyse and make sense of this data.

- As educational institutions become more complex, it is becoming increasingly important for stakeholders to communicate and collaborate effectively.