

PROJECT REPORT

THE CRM APPLICATION FOR SCHOOLS AND COLLEGES

1 INTRODUCTION

1.1 OVERVIEW

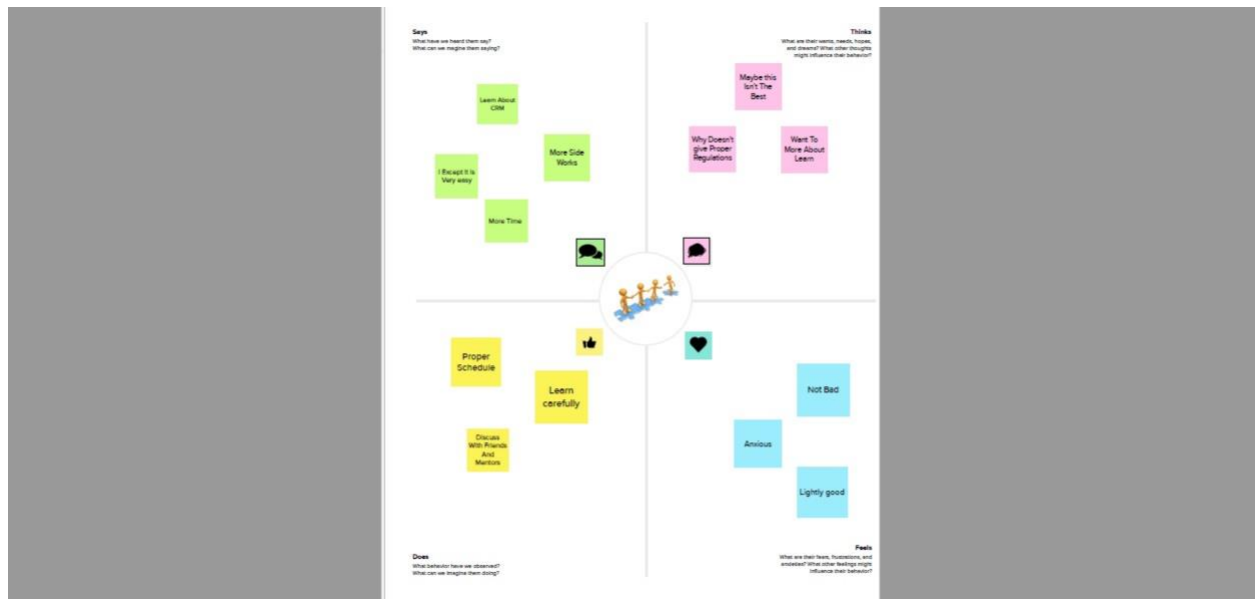
CRM stands for customer relationship management and for schools and colleges, a single CRM solution can be implemented to unify and to manage all contacts from prospective students to enrolled students to alumni and donors helps to easily contact with parents. Centralizing this data allows schools to have a 360-degree view of their constituents.

1.2 PURPOSE

- To manage their lead funnel by automating lead capture, lead scoring, and lead nurturing.
- Integrate with student information systems, learning management systems, and financial management systems.
- communication between school and parents via email, SMS, and social media integration.
- Provides lead management, student and parent profiles, communication tools, analytics and reporting, and integration with other systems.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION AND BRAINSTORM

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a how might we statement. This will be the focus of your ideation.

15 minutes

Problem

How can we use a CRM application for University and Colleges?

Key value of the ideation

To set an agenda and provide a direction

Easy to repeat

Encourage all ideas

Easy to prepare

Clear an agenda

Go for volume

Flexible, no limit

2

Brainstorm

What does this client that come to mind for solving your problem statement?

10 minutes

Person 1

The CRM can be used to send targeted and personalised communications to prospective students, such as emails and text messages

Person 2

The CRM can be used to send targeted and personalised communications to prospective students, such as emails and text messages

Person 3

The CRM can be used to send targeted and personalised communications to prospective students, such as emails and text messages

Person 4

The CRM can be used to send targeted and personalised communications to prospective students, such as emails and text messages

3

Group ideas

Now let's group your ideas into clusters (order or related ideas) as you go. Once all sticky notes have been grouped, give each cluster a sentence that sums it up. Cluster's bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

10 minutes

- Enables you to send targeted and personalised communications to prospective students, such as emails and text messages
- You need a virtual assistant who would answer the queries with high relevance and zero error
- The process of building connections with prospective students may feel more like an art than a precise science, but with CRM it's possible to shift that balance
- Higher education CRMs can increase your enrollment, and boost conversion, graduation rates, and revenue

4

Prioritize

Your team should sit in on the same page about which idea(s) is/are most likely to succeed. Place your ideas on the grid to determine which ideas are important and which are feasible.

10 minutes

Importance

High

Low

Feasibility

High

Low

The process of building connections with prospective students may feel more like an art than a precise science, but with CRM, it's possible to shift that balance

Higher education CRMs can increase your enrollment, and boost conversion, graduation rates, and revenue

Enables you to send targeted and personalised communications to prospective students, such as emails and text messages

You need a virtual assistant who would answer the queries with high relevance and zero error

3 RESULT

3.1 DATA MODEL

<i>Object name</i>	<i>Fields in the object</i>	
<i>School object</i>		
	<i>Field label</i>	<i>Data type</i>
	1.Address	<i>Test Area</i>
	2.District	
	3.State	
	4.School websites	
	1.Phone Number	<i>Phone</i>
	1.Number of Students	<i>Roll Up Summary</i>
	2. Highest mark	
<i>Student object</i>		
	<i>Field label</i>	<i>Data type</i>
	1.Phone Number	<i>Phone</i>
	1.School	<i>Master Detail Relationship</i>
	1.Results	<i>Pick List</i>
	1.Class	<i>Number</i>
	2.Mark	

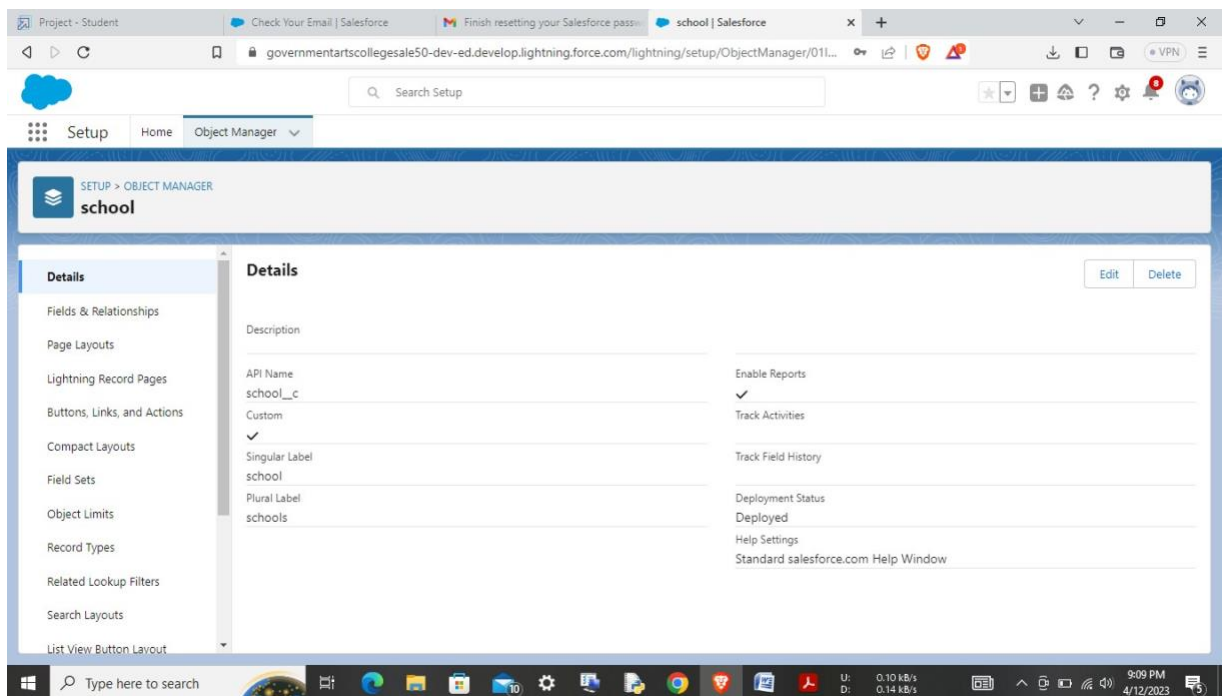
<i>Parent object</i>		
	<i>Field label</i>	<i>Data type</i>
	<i>1.Parent Address</i>	<i>Text Area</i>
	<i>1.Parent Number</i>	<i>Phone</i>

3.2 ***Activity & Screenshot***

(Milestone-2: OBJECT)

Activity-1 : Creation of School Object

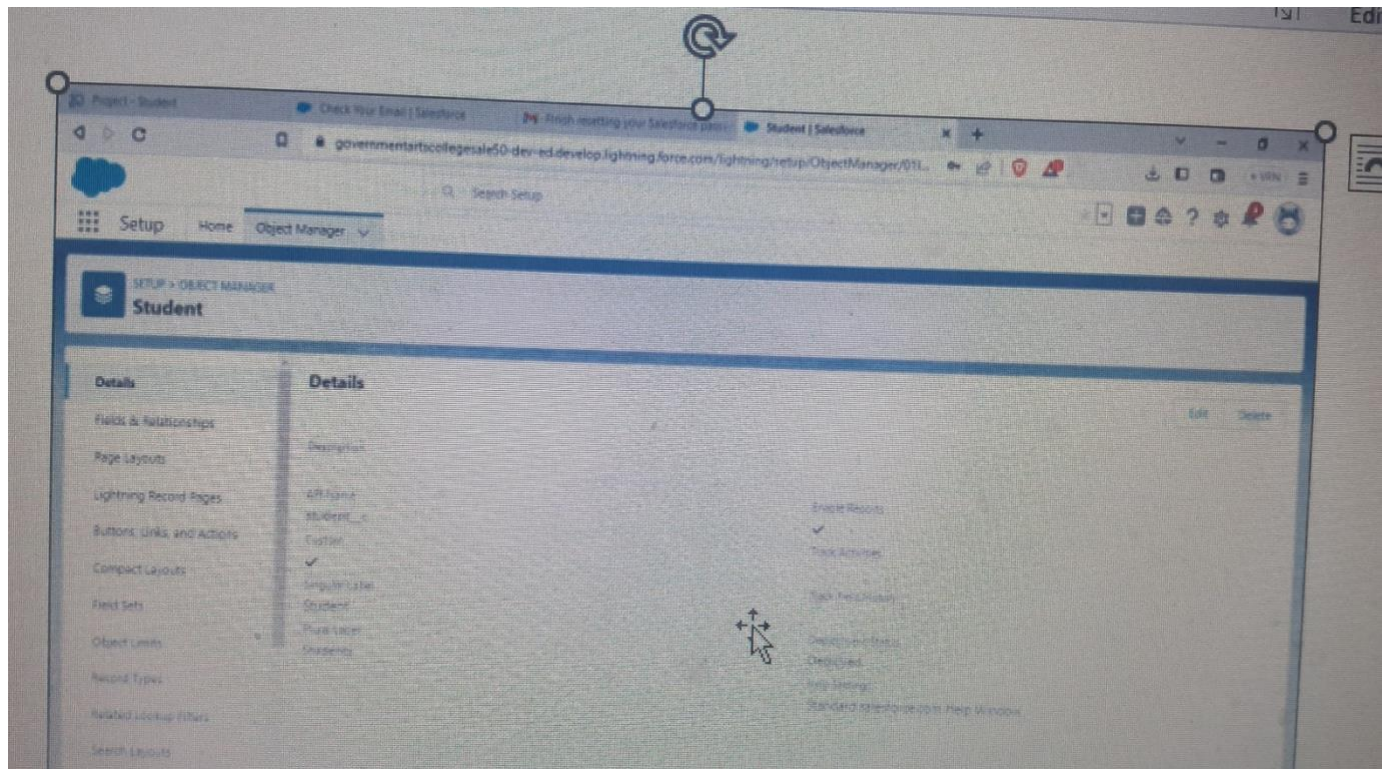
Creation of Object for School Management



(Milestone-2: OBJECT)

Activity-2 : Create Student Object

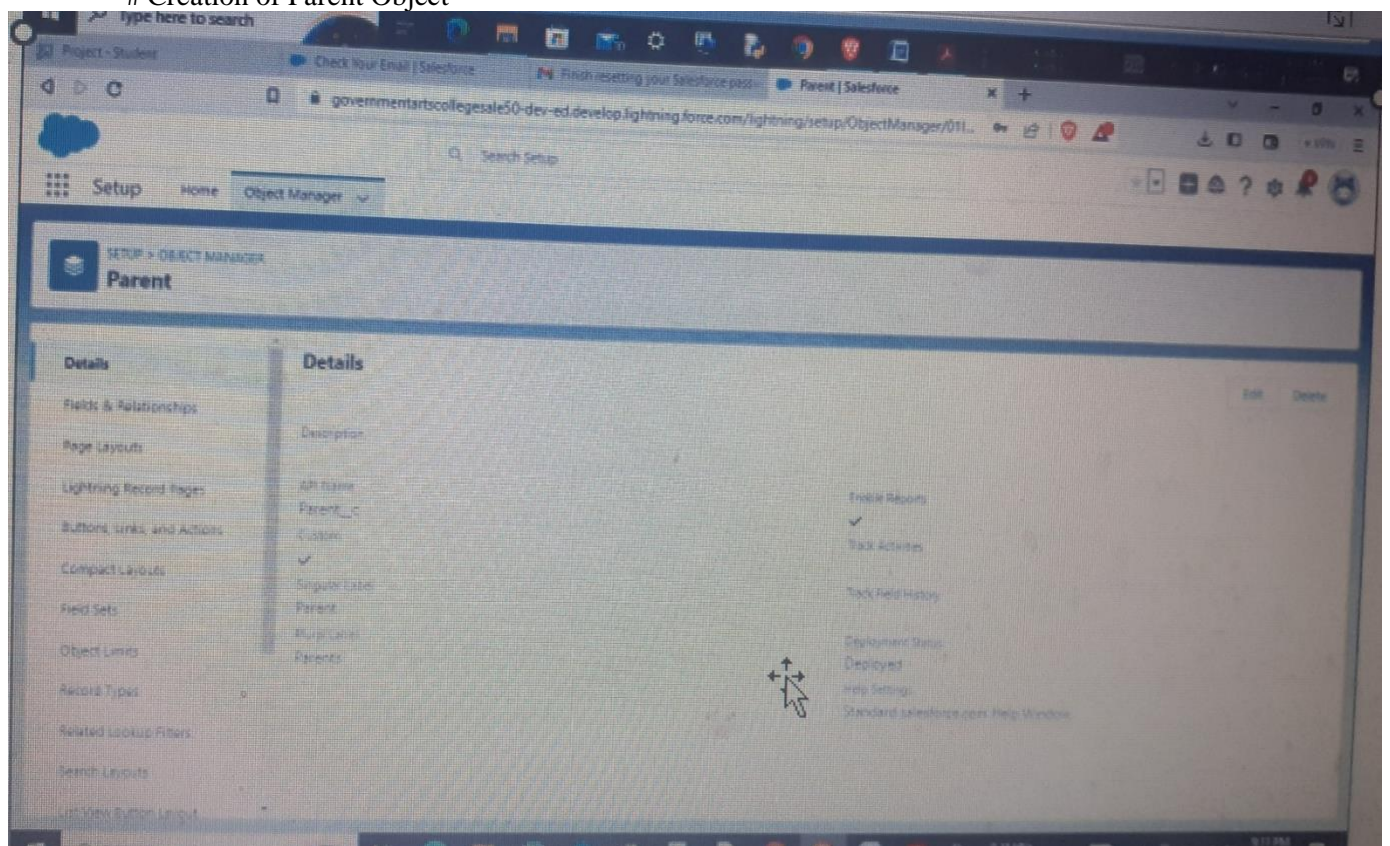
#Creation of Student Object



(Milestone-2: OBJECT)

Activity-2: Create Parent Object

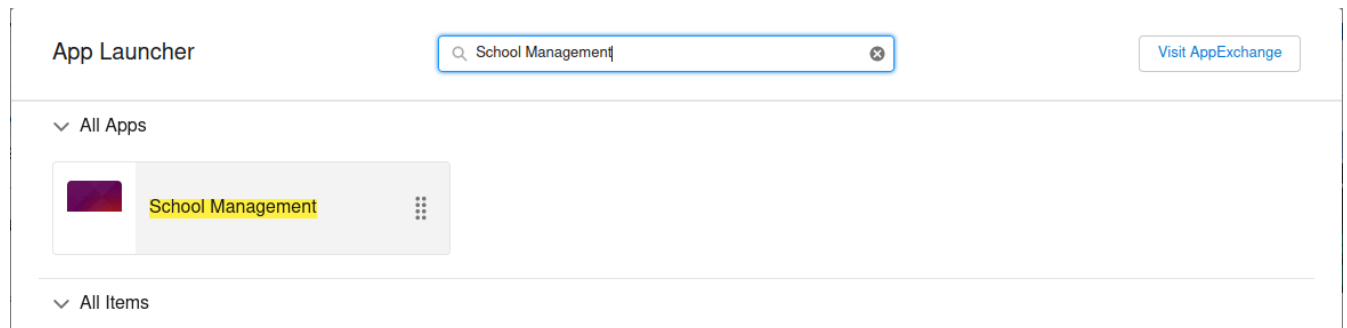
Creation of Parent Object



(Milestone-3: LIGHTNING APP)

Activity-1: Create the School Management App

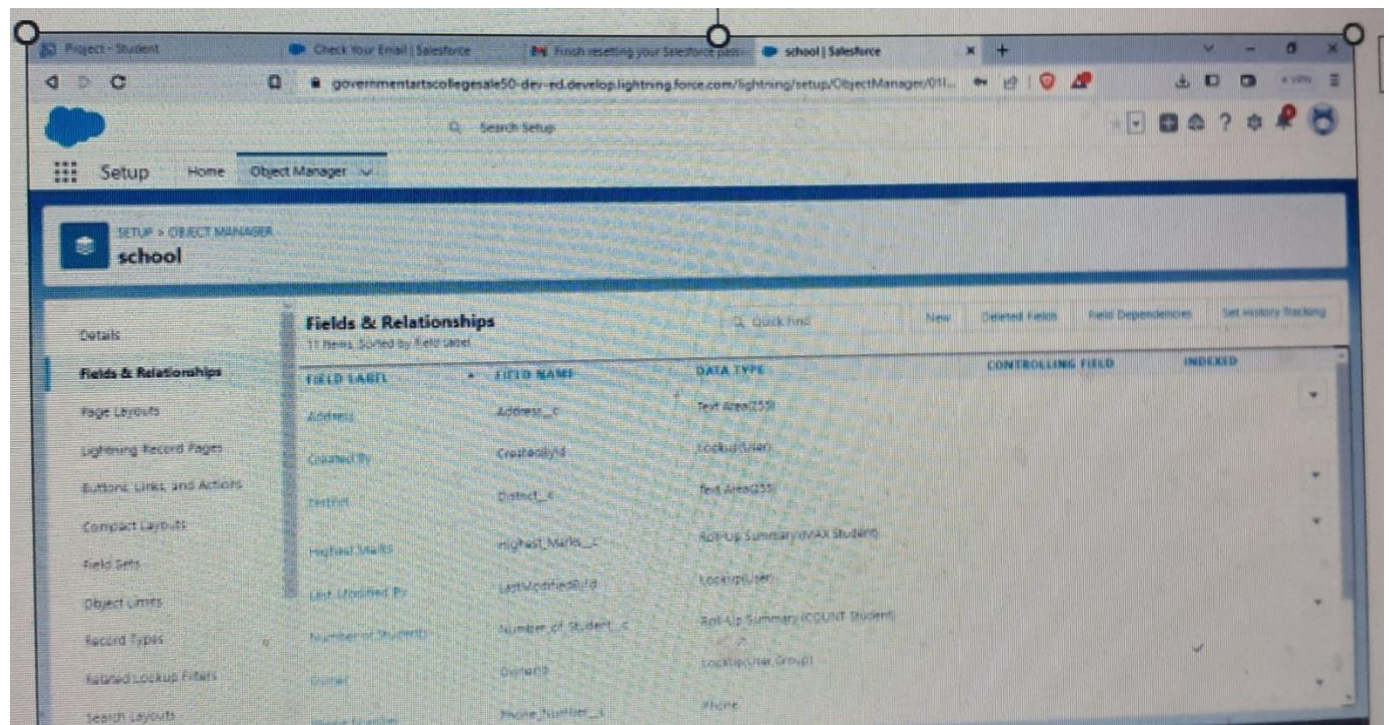
Creation School Management App



(Milestone-4: FIELDS & RELATIONSHIP)

Activity-1 : Creation of fields for the School Objects

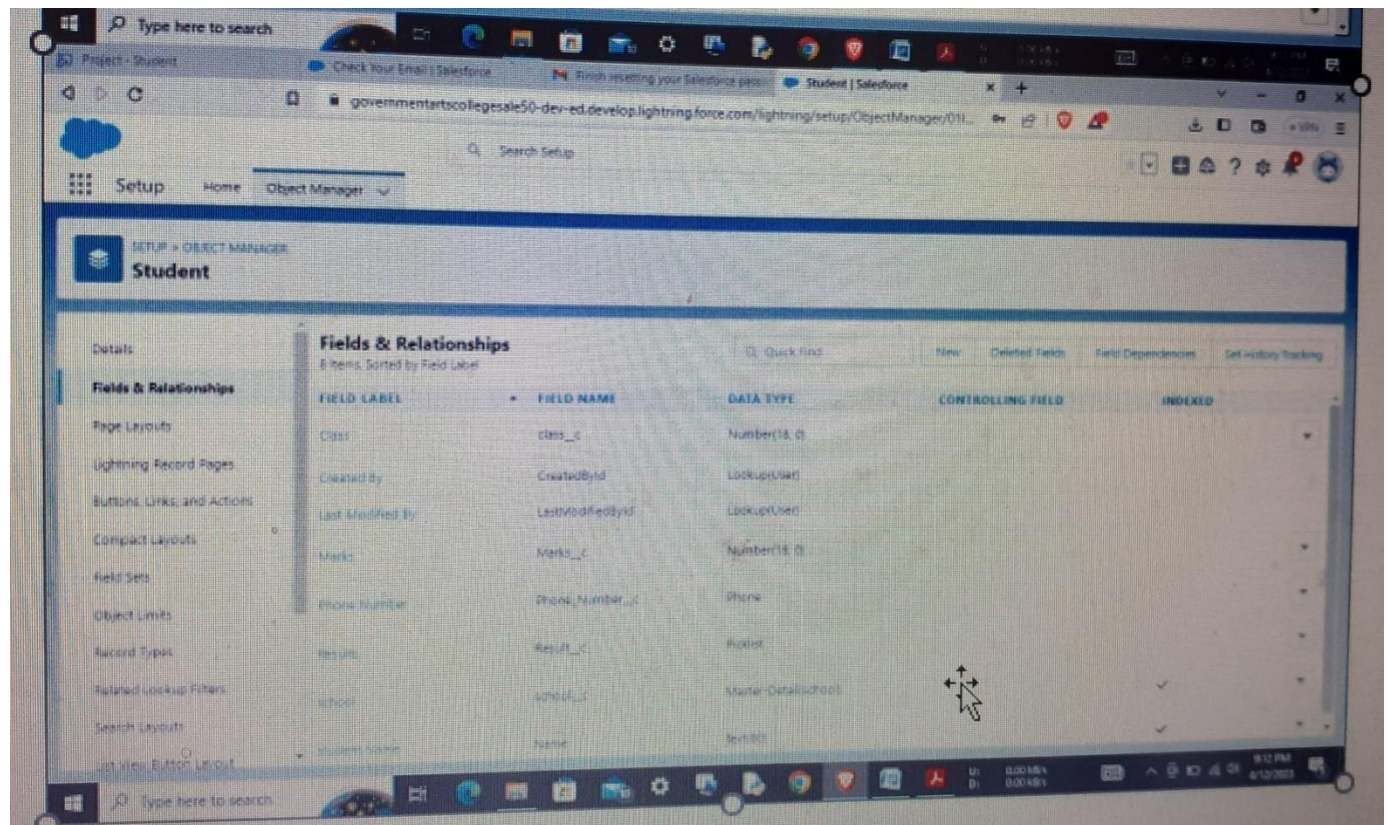
Creation of fields for the School Object



(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

Screenshot 1: Salesforce Setup - Object Manager

Setup > OBJECT MANAGER
Parent

Fields & Relationships
6 Items, Sorted by Field Label

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 Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Screenshot 2: Salesforce School Management

School Management | schools | Students | Parents | Reports | Dashboards

schools
Recently Viewed

0 items • Updated a few seconds ago

school Name

You haven't viewed any schools recently.
Try switching list views.

(Milestone-5: PROFILE)

Activity-1: Creation on Profile

Creation on Profiles

The top screenshot shows the Salesforce 'Profiles' page. It features a sidebar with navigation links like 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'schools', 'Students', and 'Parents'. The main content area displays a table of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists several profiles, including 'School Profile', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User', and 'System Administrator'. The 'School Profile' is highlighted.

The bottom screenshot shows the Salesforce 'parents' page. It features a sidebar with navigation links like 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'schools', 'Students', and 'Parents'. The main content area displays a table of users with columns for 'Action', 'Full Name', 'Username', 'Alias', 'Active', 'Role', and 'Profile'. The table lists several users, including 'Chatter Expert', 'haran_hari', 'P.HARIHARAN', 'User Integration', and 'User Security'. The 'Chatter Expert' user is highlighted.

(Milestone-6: USERS)

Activity-1: Creating a User's

Creating a User's

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](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rk1yeead.580apckvayk@chatter.salesforce.com		✓	Chatter Free User
Edit	P. SACHINDRA	SP	sachindra@teslatech.sandbox		✓	System Administrator
Edit	S. Parent	ps	parent@acme.com		✓	School profile
Edit	S. Principal	ps	principal@ks.com		✓	Standard Platform User
Edit	S. Teacher	ts	teachers@god.com		✓	Standard Platform User
Edit	User Integration	integ	integration@00d2w00000rk1yeead.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w00000rk1yeead.com		✓	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1 &2

To Set Permissions

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce po | Permission Sets | Salesforce | Permission Sets ~ Salesforce

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/0PS?appLayout=setup&noS1Redirect=true

salesforce

Search...

Switch to Lightning Experience | HARIHARAN P | Setup | Help | Content

Home | Chatter | Libraries | Content | Subscriptions | schools | Students | Parents

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

Permission Sets

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](#)

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
Del Clone	teacher permission		

1-1 of 1 | 0 Selected | Previous | Next | Page 1 of 1

Project - Student | Check Your Email | Salesforce | Finish resetting your Salesforce po | Permission Sets | Salesforce | Permission Sets ~ Salesforce

governmentartscollegesale50-dev-ed.develop.my.salesforce.com/0PS?appLayout=setup&noS1Redirect=true

salesforce

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All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
Del Clone	Principal permission		

1-1 of 1 | 0 Selected | Previous | Next | Page 1 of 1

(Milestone-8: REPORTS)

Activity-1 : Reports

Reports

Project - Student


Check Your Email | Salesforce

Finish resetting your Salesforce passw







Reports | Salesforce

governmentartscollegesale50-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

VPN



Search...



School Management

schools

Students

Parents

Reports

Dashboards

Reports

Recent

2 items


Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Parents Report		Private Reports	HARIHARAN P	3/4/2023, 9:56 pm	
Created by Me	New schools with Students Report		Private Reports	HARIHARAN P	3/4/2023, 9:56 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Type here to search



U: 16.49 KB/s

D: 0.56 KB/s

9:16 PM

4/12/2023

4 TRAILHEAD PROFILE PUBLIC URL

<i>s.no</i>	<i>Name</i>	<i>URL</i>
<i>1</i>	<i>S.Bharathi</i> <i>(Team leader.)</i>	<i>https://trailblazer.me/id/sbbsc</i>
<i>2</i>	<i>S. Revathi (Team members)</i>	<i>https://trailblazer.me/id/revas23</i>
<i>3</i>	<i>S. Deepa (Team members)</i>	<i>https://trailblazer.me/id/dphysicstm</i>
<i>4</i>	<i>K. Gowri (Team members)</i>	<i>https://trailblazer.me/id/g2yearphytm</i>

5 ADVANTAGES & DISADVANTAGES

5.1 ADVANTAGES

- *Better communication: With a CRM application, schools and colleges can send targeted messages to students, parents, and staff members.*
- *This can help to ensure that everyone is aware of important dates, events, and deadlines.*
- *A CRM application can help schools and colleges to engage with students and parents in a more meaningful way.*
- *This can help to build stronger relationships and improve overall satisfaction with the institution.*

- *A CRM application can provide schools and colleges with valuable data about their students and other stakeholders.*
- *This data can be used to make more informed decisions about resource allocation, program development, and other strategic initiatives.*

5.2 DISADVANTAGES

- *This can be a challenge for schools and colleges with limited IT resources.*
- *For a CRM application to be effective, it needs to be widely adopted by students, parents, and staff members.*
- *If there is resistance to using the application or if it is not user-friendly, it may not be effective.*
- *Collecting and storing personal information about students, parents, and staff members can raise privacy concerns. Schools and colleges need to ensure that they are complying with relevant data protection laws and taking appropriate measures to safeguard sensitive information.*

6 APPLICATION

- *School*
- *Institutions*
- *Colleges*
- *Academy*
- *Universities*

7 Conclusion

- *CRM application can help schools and colleges to improve communication, engagement, and efficiency, while also providing valuable data for decision-making.*
- *CRM application can offer many benefits, it is important for schools and colleges to carefully consider the potential disadvantages and to plan for a successful implementation that addresses these challenges.*

8 FUTURE SCOPE

The future of CRM (Customer Relationship Management) applications for schools and colleges is promising, as technology continues to advance and institutions look for more effective ways to manage interactions with students, parents, and staff members.

The CRM applications for schools and colleges is likely to be characterized by increased integration, automation, and personalization, as institutions look for ways to enhance relationships with their stakeholders and improve outcomes for students.

Thank you