

Project Report Template

INTRODUCTION: -

1.1 Overview

Schools are facing more competition than ever before, and they need to find innovative ways to attract and retain students. One solution that many schools are turning to is School CRM software. This technology helps schools manage their relationships with students and parents, and it can be a powerful tool for increasing admissions. In this blog, we'll explore what is CRM software for Schools, how it works, and how it can help in boosting enrollment and improving student engagement.

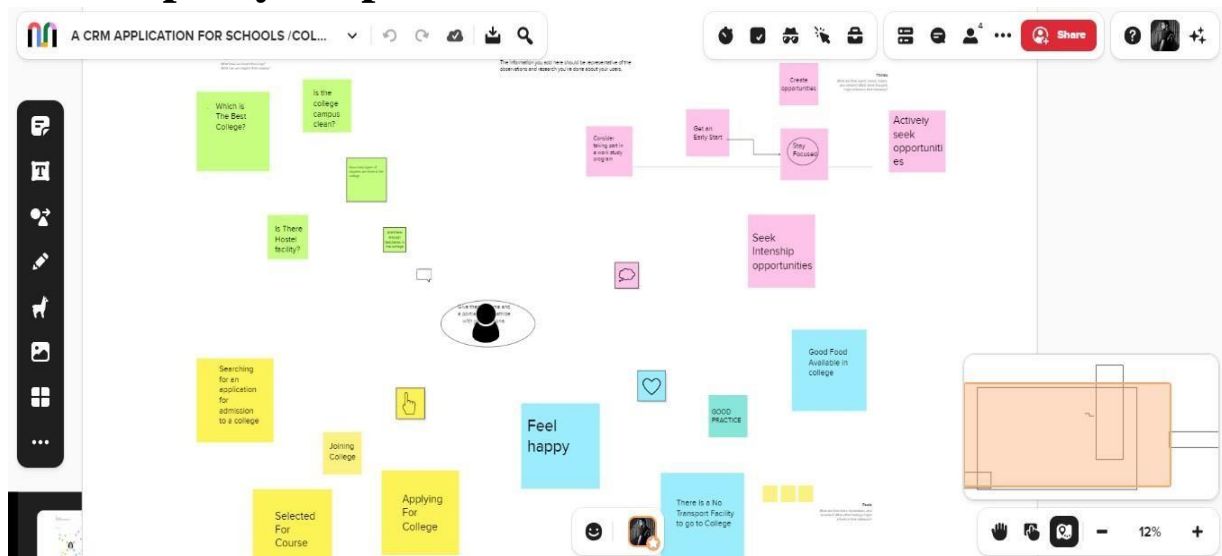
1.2 Purpose: -

A school CRM (Customer Relationship Management), software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention. This type of software is aimed at simplifying and streamlining the enrollment and retention process and provides valuable insights into student behaviour and preferences, which can help schools and preschool to make data-driven decisions.

2. Problem Definition and Design

Thinking: -

2.1. Empathy Map



2.2. Ideation and Brainstorming map Screenshot:

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
 👤 2-8 people recommended

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 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 brainstorm.

⌚ 5 minutes

PROBLEM

How might we speak student interest in local issues?

Key rules of brainstorming
To run a smooth and productive session

Stay in topic.
 Encourage wild ideas.

2 Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

TIP
You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Person 1

Increase Field teams productivity	Increase data security	Increase changes of making right decision
Increase efficiency		

Person 2

Improve handling	Automated data management	Improved conversion rates
customer retention		

Person 3

Increase sales leads	Marketing ideas new products	Activity management
contact information and details		

Person 4

Work from anywhere	Scale your business	Set goals and track
Full customer view		

Person 4

Work from anywhere	Scale your business	Set goals and track
Full customer view		

Person 8

Games & competitions

Community issue debates

Local trivia in auditorium

Learn about the community via drinking game.

"I voted sticker gets you 10 credits at the student form."

Shows & Videos

"Are you smarter than the dean?"

Get three most popular slloms to advance an episode on and issue.

DIY campaign videos/commercials

Celebrities & Superstars

Get the popular student athletes to advocate for issue.

Meet the mayor.

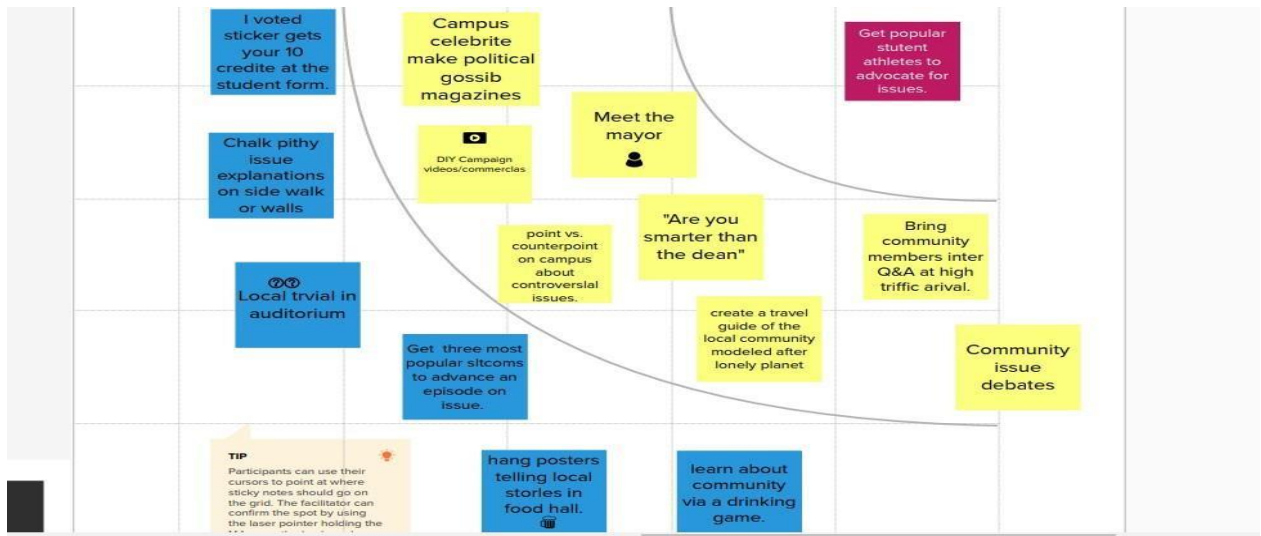
Campus celebritie make political gossip magazines.

Wild card

Put together a list of what load organization meet on what dates and times.

Create a travel guide of the local community modeled after lonely planet.

TIP
Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.

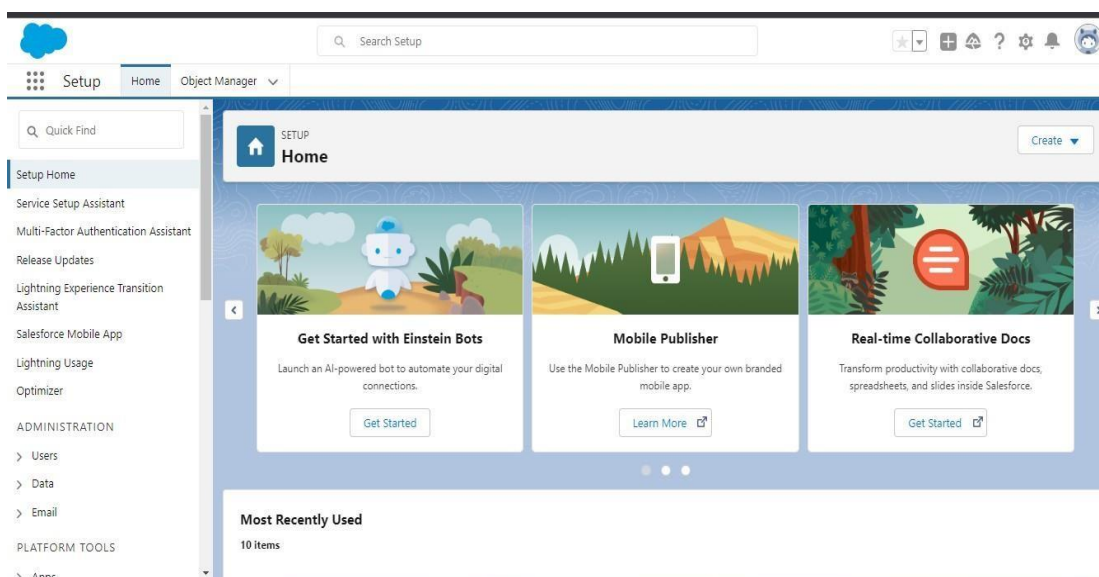


3.RESULT: - 3.1 Data Model:

Object name	Fields in the Object
Object-1	Field Label: phone number Data Type:Phone
Object -2	Field Label:Schools Data Type:Picklist
Object-3	Field Label:Parent address Data Type: Text

3.2 Activity and Screenshot: -

Create salesforce Org-creating Developer Account



Object: Creation of school object

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is divided into two columns. The left column contains: Description, API Name (School__c), Custom (checked), Singular Label (School), Plural Label (Schools), and Object Limits. The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

Field	Value
Description	
API Name	School__c
Custom	✓
Singular Label	School
Plural Label	Schools
Object Limits	
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Creation of Student Object

The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is divided into two columns. The left column contains: Description, API Name (Student__c), Custom (checked), Singular Label (Student), Plural Label (Students), and Object Limits. The right column contains: Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

Field	Value
Description	
API Name	Student__c
Custom	✓
Singular Label	Student
Plural Label	Students
Object Limits	
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

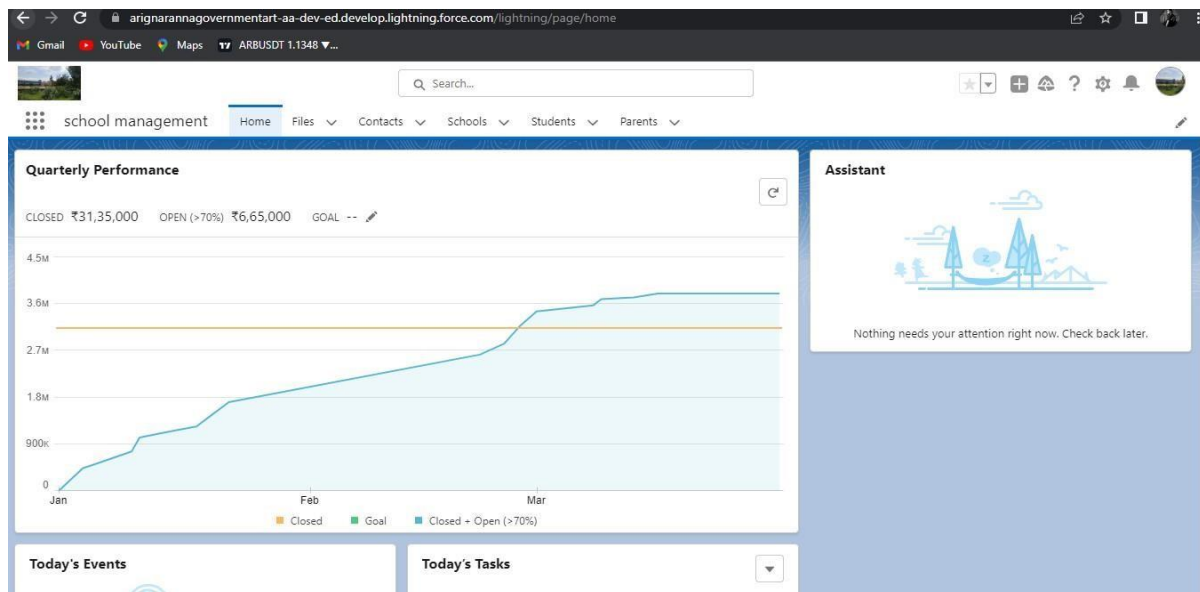
Creation of Parent Object

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is divided into two columns. The left column contains: Description, API Name (Parent__c), Custom (checked), Singular Label (Parent), Plural Label (Parents), and Object Limits. The right column contains: Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

Field	Value
Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Object Limits	
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Lighting App

Create The School Management App



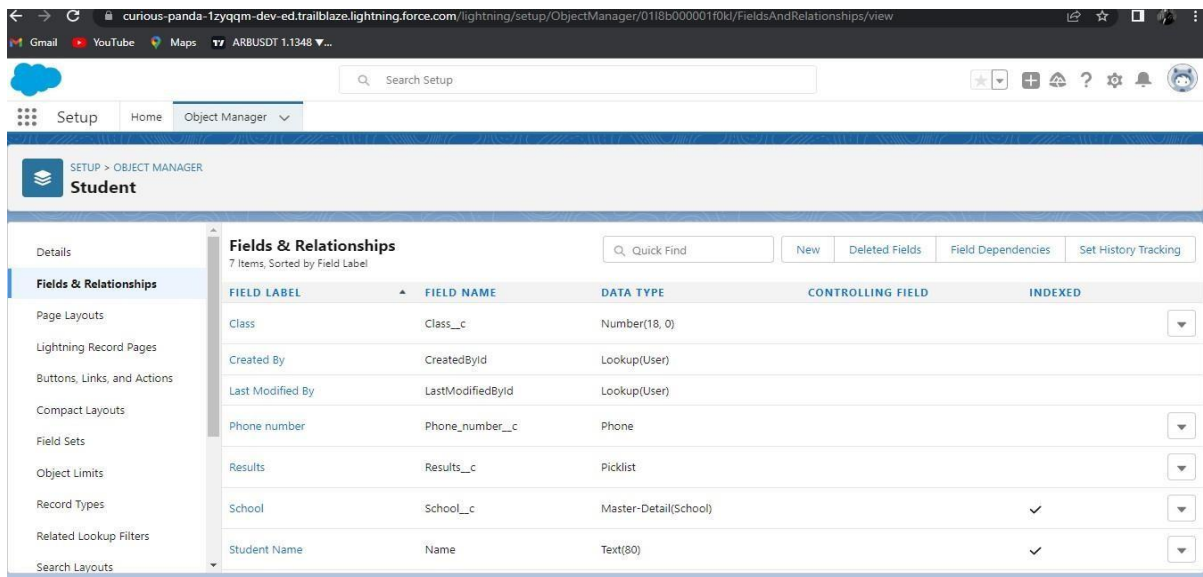
Field and Relationship

Creation Field for The Schools Objects

The screenshot shows the Lightning App interface for a school management system, specifically the 'Fields & Relationships' section. The top navigation bar includes a search bar and a menu with options: Setup, Home, and Object Manager. The main content area is divided into two sections. The left section, titled 'Details', contains a list of links: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The right section, titled 'Fields & Relationships', displays a table of fields and their relationships. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists six items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		
School Name	Name	Text(80)		✓

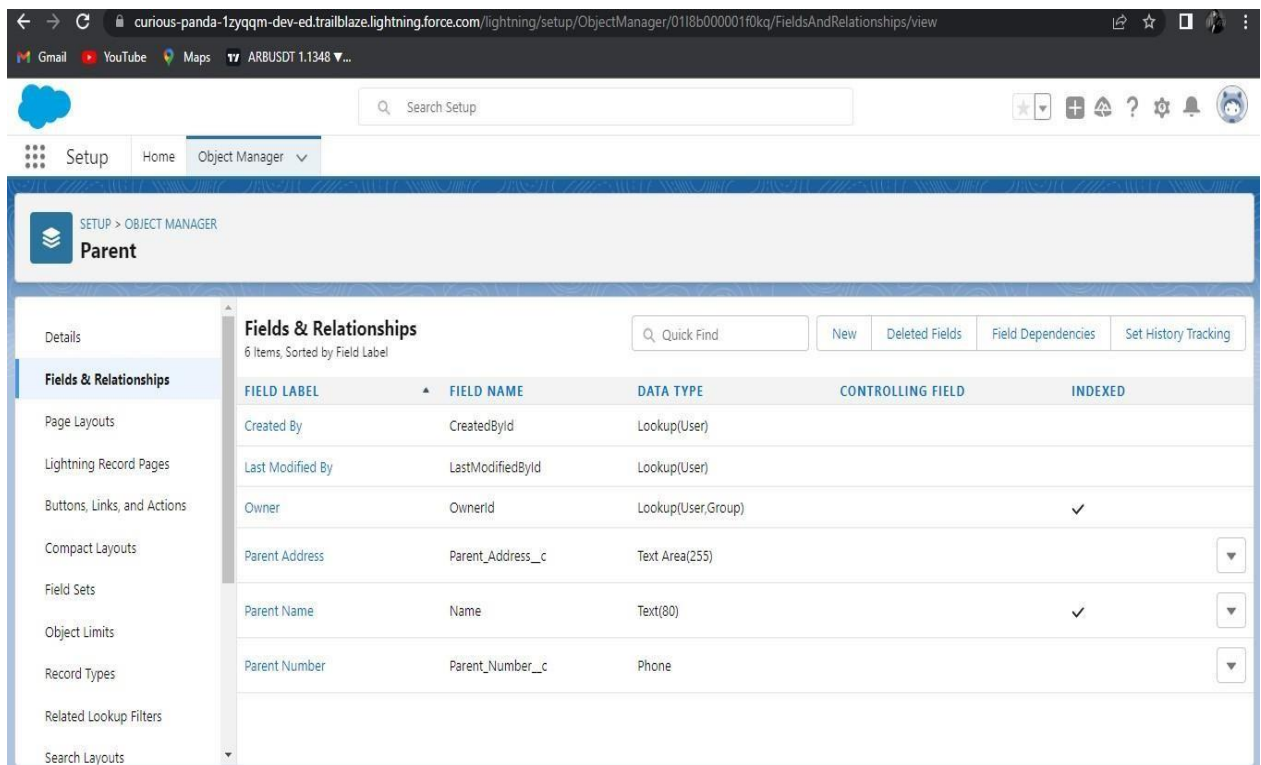
Creation Of Fields for The Student Objects



The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a table of 7 fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Phone number (Phone), Results (Picklist), School (Master-Detail(School)), and Student Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Phone number	Phone_number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Creation of Fields for The Parent Object



The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a table of 6 fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Parent Address (Text Area(255)), Parent Name (Text(80)), and Parent Number (Phone).

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		

Profile

Creation On Profile

The screenshot shows a Salesforce profile page for a user named E. INDUMATHI. The page has a header with a search bar and navigation tabs: School Management, Schools, Students, Parents, Reports, Dashboards, and a dropdown menu for E. INDUMATHI. The profile card features a circular profile picture of a young girl, the name E. INDUMATHI, and a bio: "A CRM Application For Schools/Colleges". There are buttons for "Edit" and "User Detail". Below the profile card, there are two sections: "Details" and "Related". The "Related" section includes a Trailhead badge and a link to "Learn new skills on Trailhead, the fun way to learn Salesforce." and a link to "Connect with fellow Trailblazers on the Trailblazer Community."


Users









The screenshot shows the Salesforce Users management page. The left sidebar contains a search bar with "user" and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled "SETUP Users" and contains a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Chatter Expert, INDUMATHI_E, and User Integration. There are buttons for "New User", "Reset Password(s)", and "Add Multiple Users" at the top and bottom of the table.


Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000byskueax.qhxpjngsm5eg@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	INDUMATHI_E	IE	ethirajanindumathi@gmail.com	CEO	✓	School Profile
<input type="checkbox"/> Edit	INDUMATHI_E	EINDU	ethirajanindumathi@brave-wolf-ri5u7e.com	CEO	✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5i00000byskueax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5i00000byskueax.com		✓	Analytics Cloud Security User

Permission Sets

Permission 1




Setup

Home

Object Manager

Users


Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.


Permission Sets

Permission Set

Teacher permission


Clone
Edit Properties
Manage Assignments









Permission Set Overview


Description	API Name	Teacher_permission
License	Namespace Prefix	
Session Activation Required	Created By	E_INDUMATHI, 20/04/2023, 1:16 pm
Last Modified By	E_INDUMATHI, 20/04/2023, 1:16 pm	

Apps

Permission 2




Setup

Home

Object Manager

Users


Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.


Permission Sets

Permission Set

Principal permission

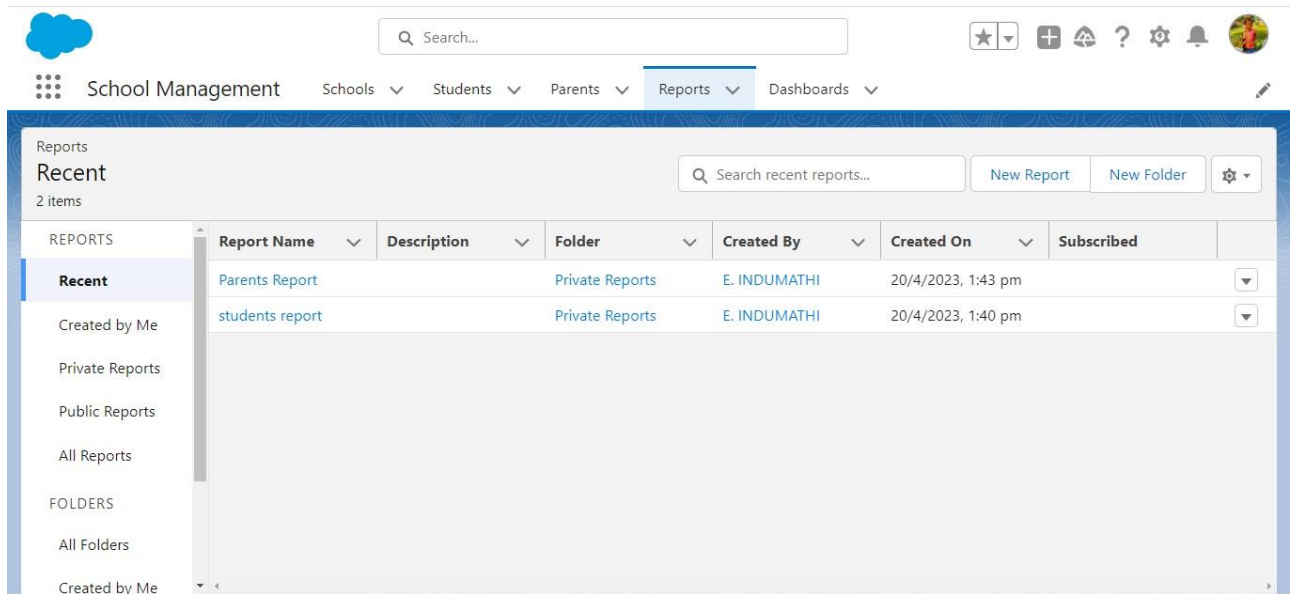
Clone
Edit Properties
Manage Assignments

Permission Set Overview

Description	API Name	Principal_permission
License	Namespace Prefix	
Session Activation Required	Created By	E_INDUMATHI, 20/04/2023, 1:21 pm
Last Modified By	E_INDUMATHI, 20/04/2023, 1:21 pm	

Apps

Reports



4.Trailhead Profile public URL

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

Team member 1- <https://trailblazer.me/id/sowndi>

Team member 3- <https://trailblazer.me/id/blkr>

Team member 2- <https://trailblazer.me/id/hemm>

5.ADVANTAGES & DISADVANTAGES:

As you switch to using a CRM software solution for schools, many benefits come along. Not only does it enhance your efficiency on the performance end but also enables you to foster your relationships with existing and potential students/ parents. Here are some of the common benefits:

1. **Increased Efficiency:** School CRM software automates many of the manual processes involved in student and parent communication, data management, and **reporting**. This can save schools time and resources, allowing them to focus on other important tasks. By having all relevant information in one place, staff can access student and parent data quickly

and easily, reducing the need for manual data entry and improving accuracy.

2. **Better Student Engagement:** It enables schools to track interactions with students and their parents, and provides a platform for **personalized communication**, this can help schools build stronger relationships with students, increase engagement, and provide a better overall experience. Schools can also use the software to send targeted communications and track student progress, helping to identify any areas of concern and address them promptly.
3. **Improved Data Insights:** With all data stored in one place, schools can gain valuable insights into student behaviour, preferences, and trends. This information can be used to make informed decisions about admission processes, student engagement, and resource allocation. Schools can also use the data to monitor student progress and identify areas for improvement.
4. **Enhanced Reputation Management:** School CRM software helps schools in managing their reputation by tracking student satisfaction and addressing concerns in a timely manner. By having all relevant information in one place, schools can respond to student and parent inquiries more efficiently and effectively. This can help schools maintain a positive image and build stronger relationships within the community.
5. **Increased Admissions:** School CRM software can automate many of the tasks involved in student enrollment, allowing schools to reach more prospective students and increase admissions. By using the software to track student interactions and send targeted communications, schools can improve their outreach efforts and increase their chances of attracting new students.
6. **Better Alumni Management:** A CRM can help schools keep in touch with alumni and tap into their networks for fundraising and recruitment. Schools can use the software to track alumni interactions, send targeted communications, and organise events. This can help schools maintain strong relationships with their alumni and leverage their networks to support their mission.

APPLICATION:

1. **Automated Marketing:** The software can automate marketing tasks such as email campaigns, SMS messaging, and social media outreach, allowing schools to reach more prospective students.

2. Lead Management: A CRM can help schools track and manage leads, providing a centralised database of prospective students. This allows schools to prioritize leads and follow up with them in a timely manner.

Personalized Communication: By tracking student interactions and preferences, schools can send personalized communications that are more likely to resonate with prospective students.

4. Data Insights: The software provides valuable insights into student behaviour and preferences, allowing schools to make informed decisions about their recruitment efforts.

5. Improved Outreach Efforts: With all data in one place, schools can analyse trends and make data-driven decisions about their outreach efforts. This can help schools reach the right students with the right message, increasing the chances of attracting new students.

CONCLUSION:

Overall, School CRM software can help schools streamline the enrollment process, reach more prospective students, and increase admissions. It helps schools and preschools in managing student data and interactions, automate tasks related to recruitment and enrollment, and improve the efficiency of their recruitment and retention efforts. It can also help to increase the effectiveness of enrolment campaigns. SCHOOL MANAGEMENT CRM APPLICATION enables you to do all this and much more on a unified platform. Schedule a demo today and learn more about a purpose-built growth solution for schools.

FUTURE SCOPE:

Customer Relationship Management is the best means to reach your customers and serve them in the best way. It automates all those tasks which enterprises used to perform manually. Every organization is set up with some frustrated ambitions and targets. The better the performance of your business, the better the relationship with your customers will be. CRM software Development can turn your business into a powerhouse of sales. Thus, CRM software is no longer essential, in fact mandatory for small and medium businesses. Now, you can easily access the CRM software virtually from anywhere and anytime. All you need an internet connection to further the scope of doing your business. So, don't be late and perform the necessities for implementing the CRM software in your business.