

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 relationship 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 behaviours, which can help schools and preschools to make data-driven decisions.


2. Problem Definition and Design Thinking:-

2.1 Empathy Map



2.2 Ideation and Brainstorming map screenshot:

Term



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 team 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

enrich information and details

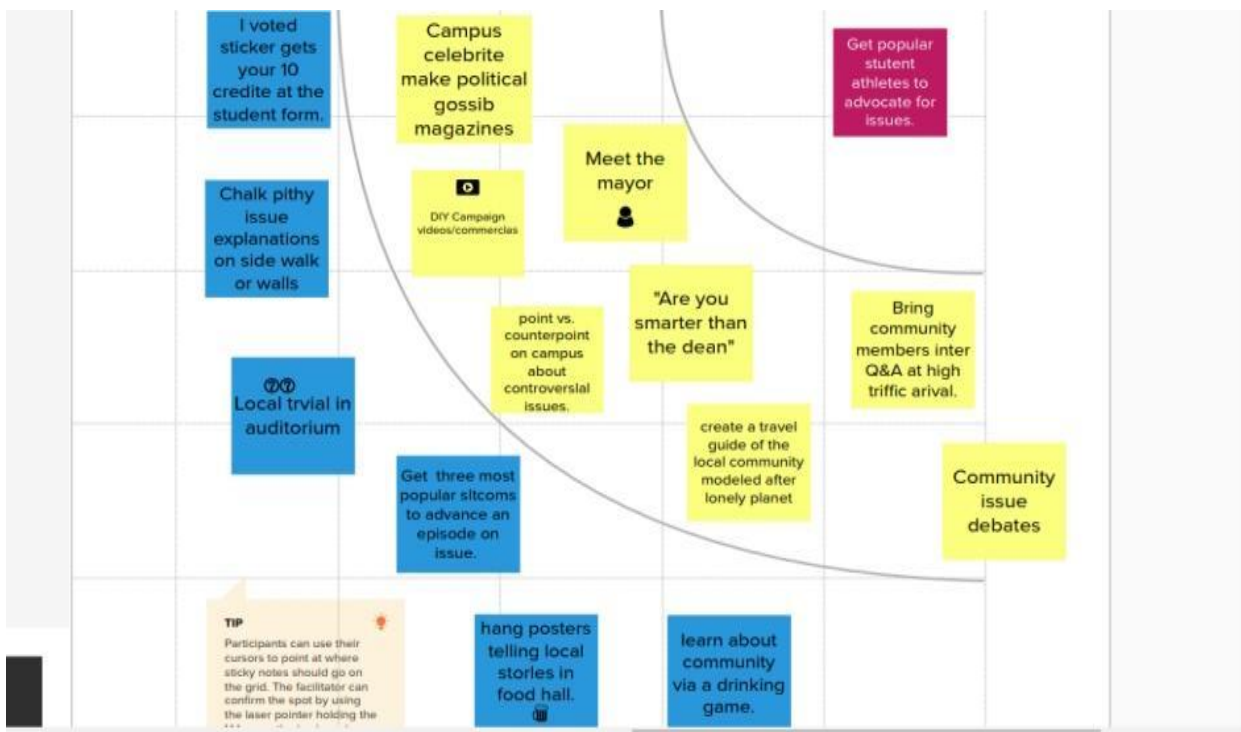
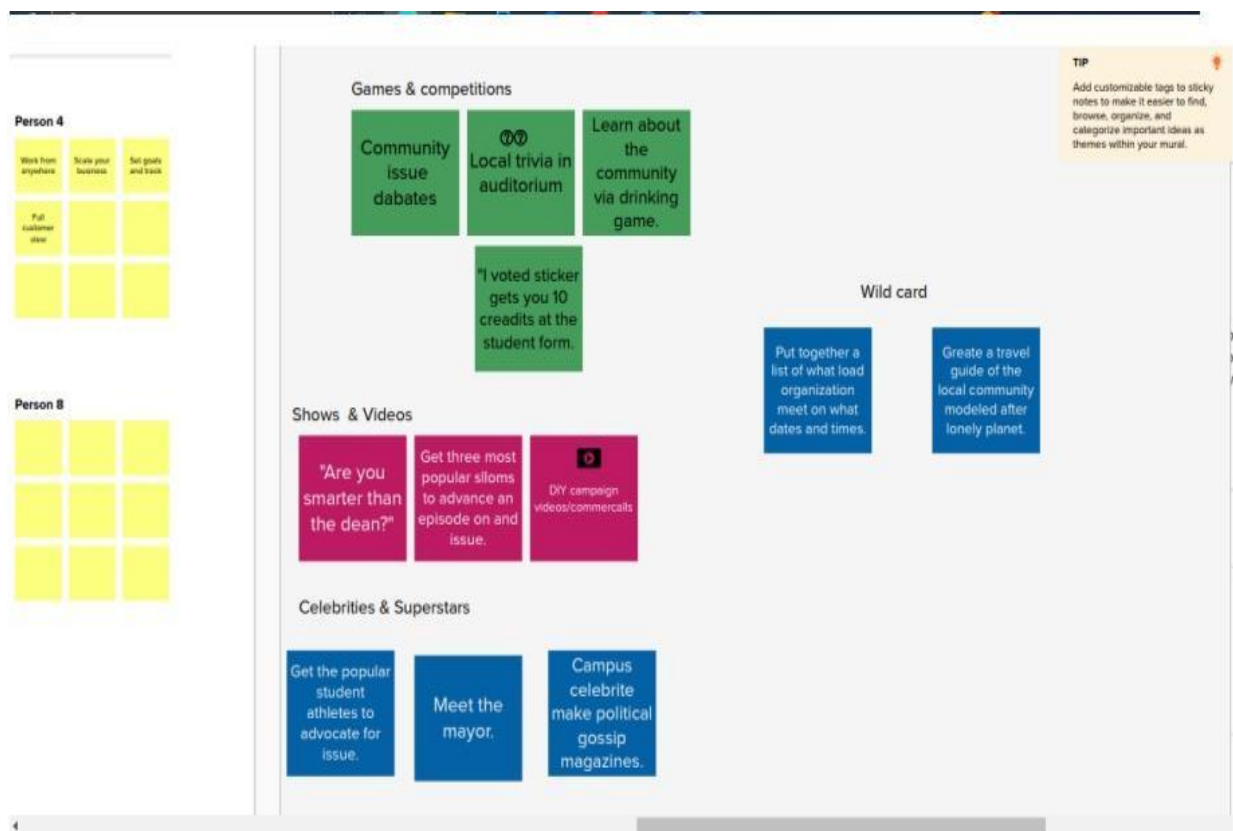
Person 4

Work from anywhere

Scale your business

Set goals and track

Full customer view



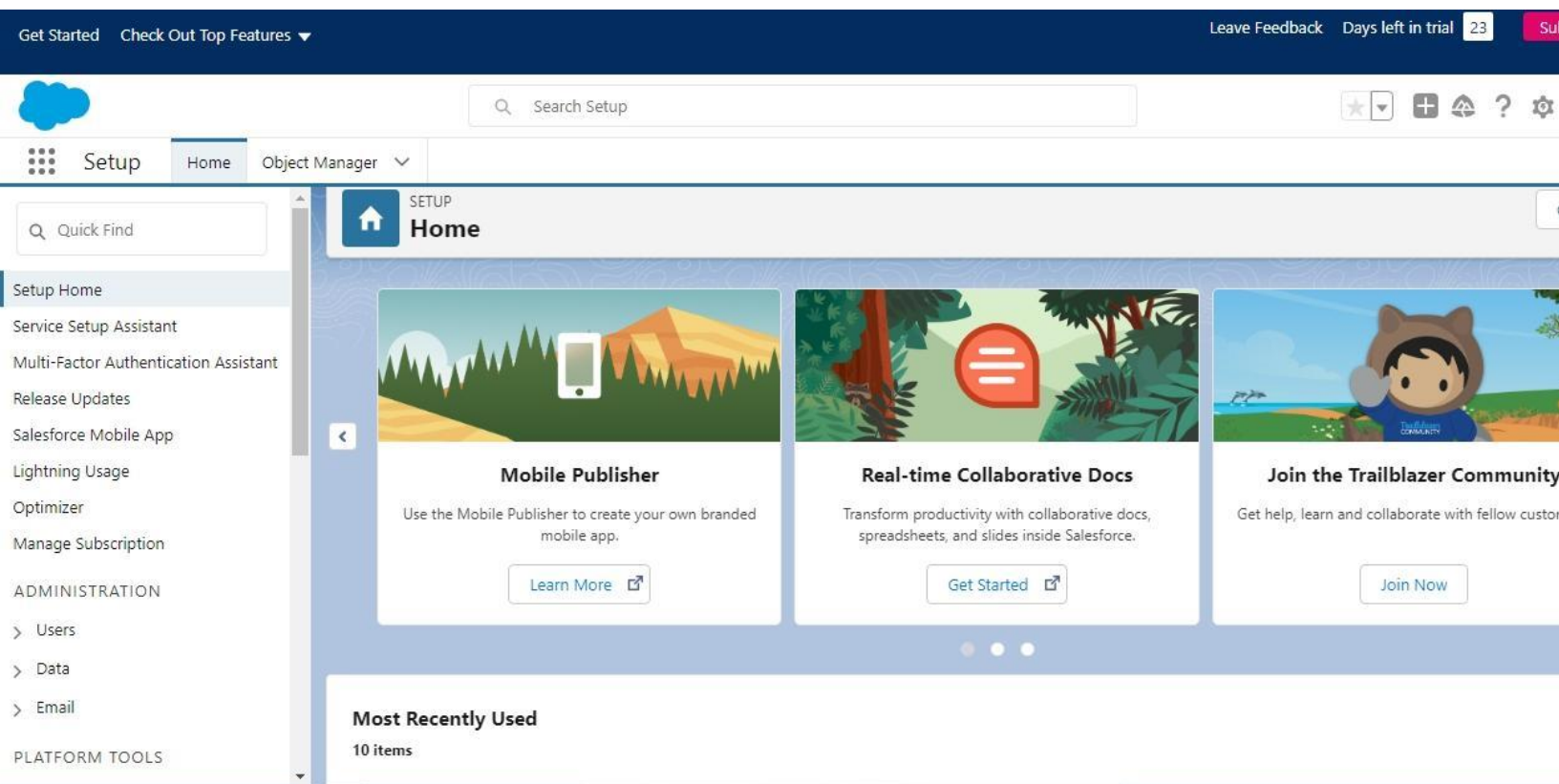
3. RESULT:-

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



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⚙️

🔔



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

School

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

Details

Description

API Name

School__c

Custom

✓

Singular Label

School

Plural Label

Schools

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed


Help Settings

Standard salesforce.com Help Window

Edit

Delete

Creation of Student Object



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?

⚙️

🔔



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

Field Sets

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Details

Description

API Name

leader__c

Custom

✓

Singular Label

Student

Plural Label

Students

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, specifically the Object Manager for the 'Parent' object. The left sidebar lists various configuration options: Details, 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 area displays the 'Details' for the 'Parent' object, including fields like API Name (Father__c), Custom (checked), Singular Label (Parent), and Plural Label (Parents). It also shows settings for Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are visible in the top right corner.

Lightning App

Create The School Management App

The screenshot displays the 'School Management' Lightning App dashboard. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main content area is divided into three sections: 'Connect with Your Customers', 'Manage & Close Deals', and 'Build Your Pipeline'.
Connect with Your Customers: A horizontal bar chart titled 'Sales Person Activity' showing the record count for various companies. The y-axis lists 'Company / Account' and the x-axis shows 'Record Count' from 0 to 6. The data is as of today at 5:49 pm.

Company / Account	Record Count
Acme (Sample)	5
Global Media (Sample)	1
Green Dot Publishing	1
MedLife, Inc.	1
Universal Technologies	1

Manage & Close Deals: A stacked bar chart titled 'Team Pipeline' showing the sum of amount for 'Existing Business' (blue) and 'New Business' (dark blue) over time. The y-axis is 'Sum of Amount' from 0 to 1.2M. The x-axis shows 'Created Date' for April 2023. The data is as of today at 5:49 pm.

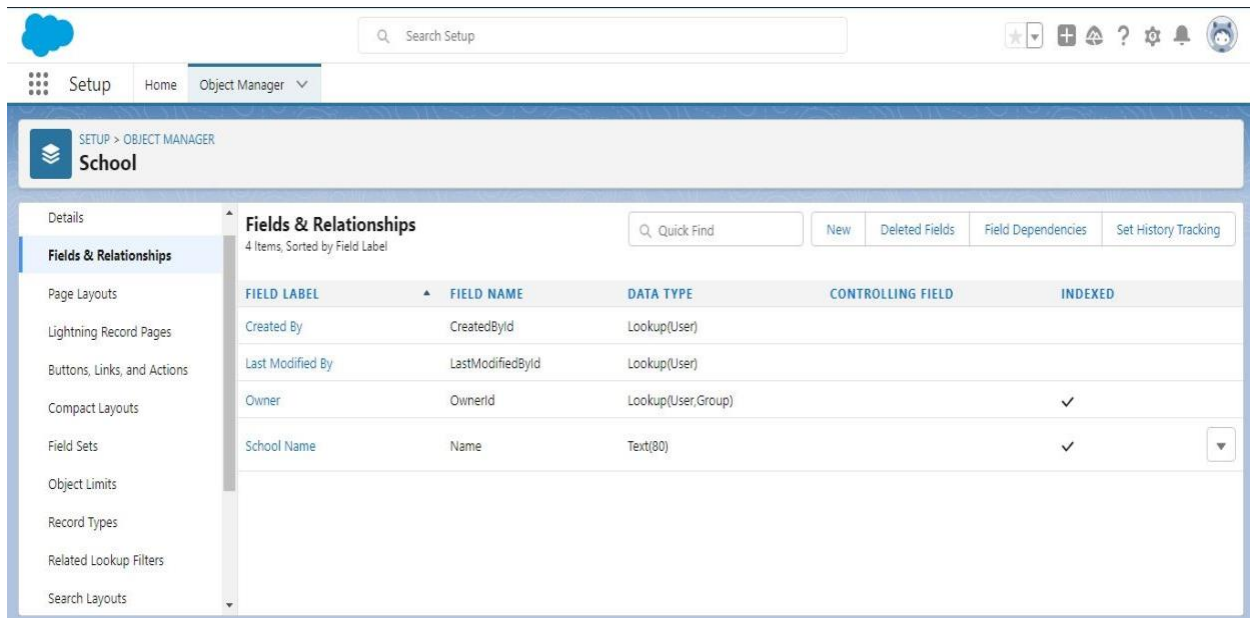
Created Date	Existing Business	New Business
April 2023	~800k	~400k

Build Your Pipeline: A bar chart titled 'Leads by Source' showing the record count for different lead sources. The y-axis is 'Record Count' from 0 to 2. The x-axis shows 'Lead Source > Created Month' for 01/04/2023. The data is as of today at 5:49 pm.

Lead Source > Created Month	Record Count
Adver... 01/04...	1
Empl... 01/04...	1
Other 01/04...	2
Trade... 01/04...	1
Webs... 01/04...	1

Field and Relationship

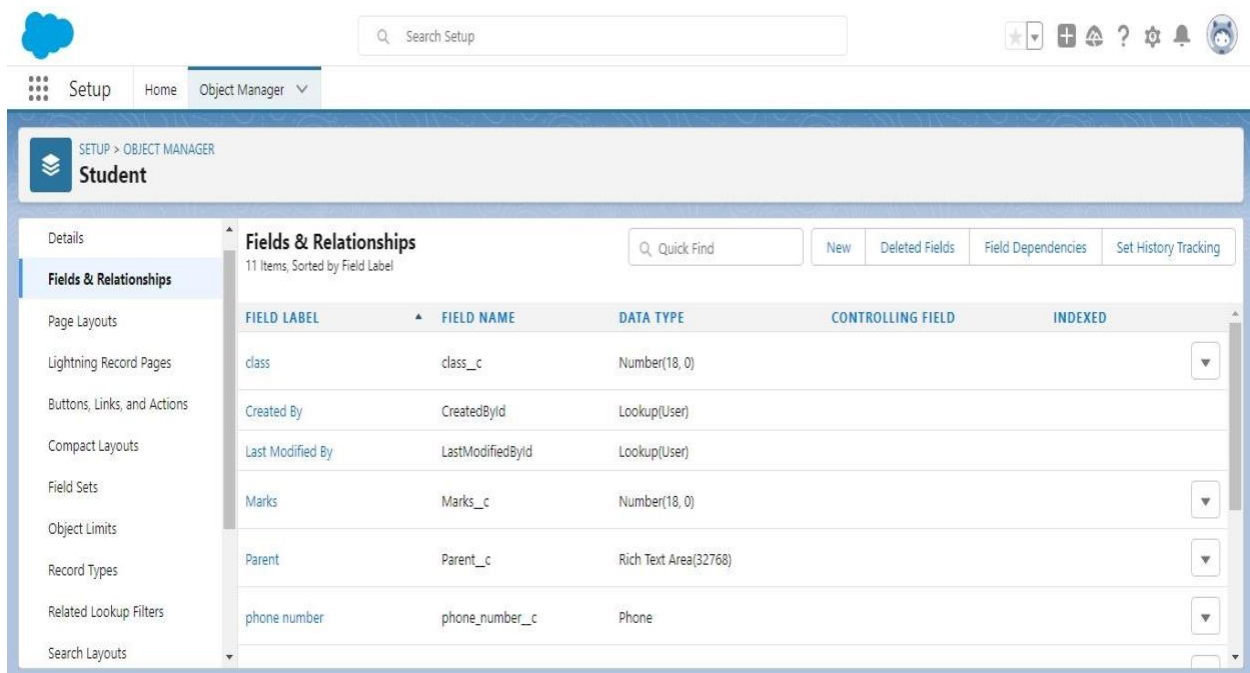
Creation Field for The Schools Object



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a table of 4 items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are 'Created By', 'Last Modified By', 'Owner', and 'School Name'.

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)		✓
School Name	Name	Text(80)		✓

Creation of Fields for The Student Objects



The screenshot shows the Salesforce Setup interface for the 'Student' object. The 'Fields & Relationships' section is active, displaying a table of 11 items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are 'class', 'Created By', 'Last Modified By', 'Marks', 'Parent', and 'phone number'.

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)		
Marks	Marks_c	Number(18, 0)		
Parent	Parent_c	Rich Text Area(32768)		
phone number	phone_number_c	Phone		

Creation of Fields for The Parent Object

Users

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'users' and a list of navigation items: Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a search bar, a 'View: All Users' dropdown, and a table of users. The table has columns for Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The table lists four users: Chatter Expert, M. GAYATHRI, Mahalakshmi, and Sponsor_Exec. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

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](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d2w00000rsfear.x4lqgta7g@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	M. GAYATHRI	GM	sumimaga19-xurk@force.com	12/04/2023, 6:24 pm		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mahalakshmi	maha	mahalakshmi@thesmartbridge.com			<input checked="" type="checkbox"/>	School Profile
<input type="checkbox"/> Edit	Sponsor_Exec	esoon	execsponso44mfurnvop49.qdvqvltpzj6@force.com			<input type="checkbox"/>	End User

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

Permission sets

Permission 1

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'Quick Find' and a list of navigation items: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS. The main content area is titled 'Permission Sets' and shows the 'teacher permission' set. The 'Permission Set Overview' section displays details such as Description, License, API Name (teacher_permission), Namespace Prefix, Session Activation Required, Created By (GAYATHRI M), and Last Modified By (GAYATHRI M). Below this is the 'Apps' section, which includes links for 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'.

Permission Sets

Permission Set **teacher permission**

[Find Settings...](#) [Clone](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description	API Name
teacher_permission	teacher_permission

License

Namespace Prefix

Session Activation Required ☐

Created By **GAYATHRI M** 10/04/2023, 11:20 am

Last Modified By **GAYATHRI M** 10/04/2023, 11:20 am

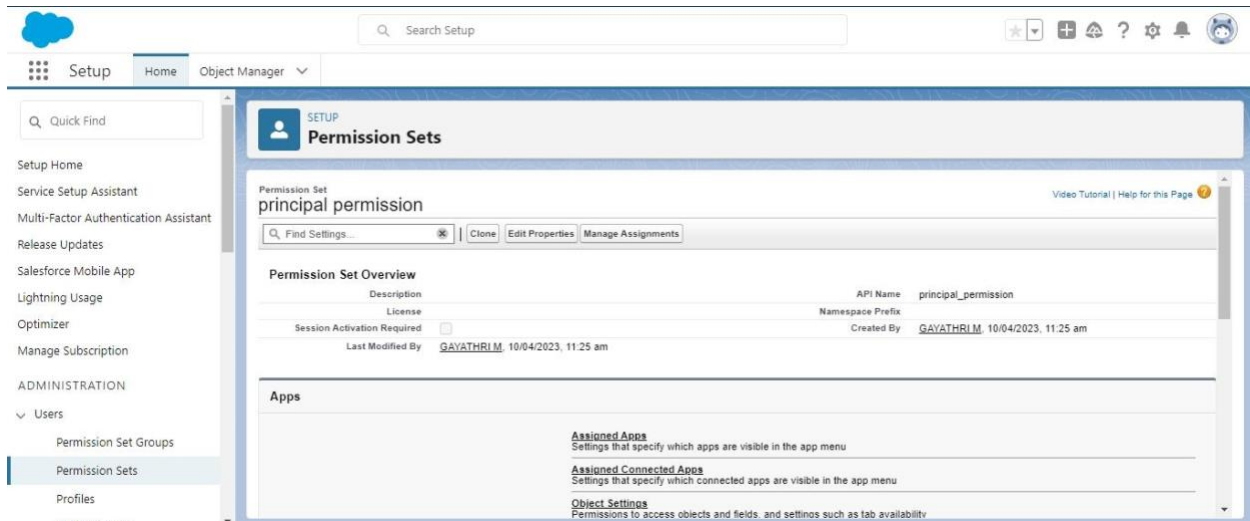
Apps

[Assigned Apps](#)
Settings that specify which apps are visible in the app menu

[Assigned Connected Apps](#)
Settings that specify which connected apps are visible in the app menu

[Object Settings](#)

Permission 2



The screenshot shows the Salesforce Setup interface for the 'principal permission' set. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Permission Set Overview' for 'principal permission'. Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'.

Permission Set Overview

Field	Value
Description	principal permission
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	GAYATHRI M. 10/04/2023, 11:25 am
API Name	principal_permission
Namespace Prefix	
Created By	GAYATHRI M. 10/04/2023, 11:25 am

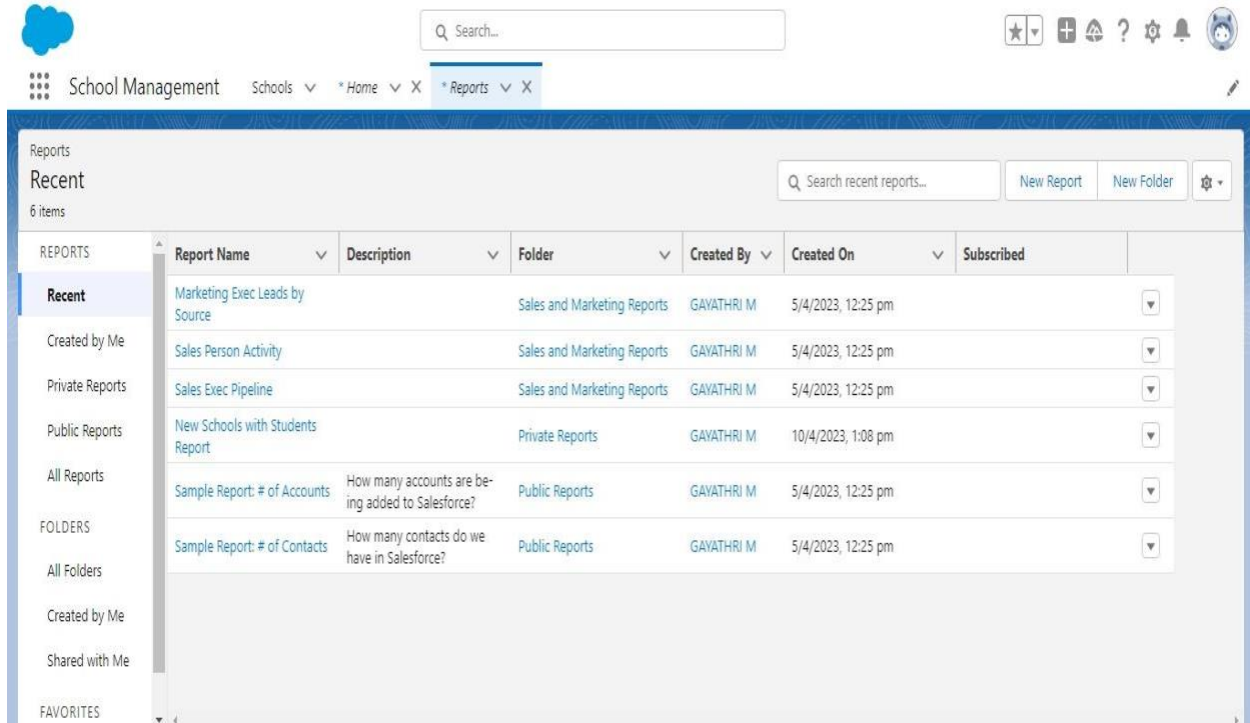
Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

Reports



The screenshot shows the Salesforce Reports interface. The left sidebar contains navigation links for Reports, Recent, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, and FAVORITES. The main content area displays a table of recent reports.

Recent

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Marketing Exec Leads by Source		Sales and Marketing Reports	GAYATHRI M	5/4/2023, 12:25 pm	
Created by Me	Sales Person Activity		Sales and Marketing Reports	GAYATHRI M	5/4/2023, 12:25 pm	
Private Reports	Sales Exec Pipeline		Sales and Marketing Reports	GAYATHRI M	5/4/2023, 12:25 pm	
Public Reports	New Schools with Students Report		Private Reports	GAYATHRI M	10/4/2023, 1:08 pm	
All Reports	Sample Report: # of Accounts	How many accounts are being added to Salesforce?	Public Reports	GAYATHRI M	5/4/2023, 12:25 pm	
FOLDERS	Sample Report: # of Contacts	How many contacts do we have in Salesforce?	Public Reports	GAYATHRI M	5/4/2023, 12:25 pm	
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

4. Trailhead Profile public URL

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

Team member 1-

<https://trailblazer.me/id/maahii>

Team member 2-

<https://trailblazer.me/id/vidhyaaa>

Team member 3-

<https://trailblazer.me/id/vasua11>

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 and 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, preference, 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 messages, 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.

3. Personalized Communication:

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

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-build 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 use 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.