



Sri Meenakshi Govt.Arts College for Women (A),  
Madurai - 625 002

Department of Physics

Naan Mudhalvan Scheme

Domain : Sales Force Associate

Project Tile : CRM Application for Schools & Collages

Submitted by

TEAM V

Team Lead : Ms. Priyadharshini.B

Team Member 1 : Ms.Priyadharshini.P

Team Member 2: Ms.Priyadharshini.N

Team Member 3: Ms.Nandhini.P.S

Mentors : Dr. K. Vijaya Kumar & Dr. P. Indra Devi

Assistants Professors, Department of Physics, Sri Meenakshi Govt.Arts College for  
Women, Madurai

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# PROJECT REPORT TEMPLATE

## 1 INTRODUCTION

### 1.1 Overview

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. CRM software is an excellent tool for schools and institutions looking to enhance their enrollment and on boarding experience for new students. If you're part of the enrollment staff, a CRM for education helps you create lasting relationships with new students and manage them efficiently throughout the student lifecycle.

An education customer relationship management software (CRM) manages all your institution's interactions with prospective and current students. It also supports managing communications with alumni, employees, donors, and other members of the education sector in your institution.

### **Benefits of using CRM systems in higher education**

The conversion rate can be increased by up to four times when CRM is used. According to IBM, every dollar spent on CRM deployment generates a profit of five dollars. This alone highlights the value of using this technique. The primary advantages of CRM for higher education are outlined below.

1. Reduction in the cost of

expenses 2. Improving the quality of service 3.Improving the organization management process 4.Increased customer loyalty 5. Track and increase the number of potential clients 6.History of work with each student 7. Relevant and visual analytics reports 8. Easy integrating with third party services 9. Planning and multitasking 10.Easy implementation 11. Increase in repeat courses sales 12. Elimination of errors in processes

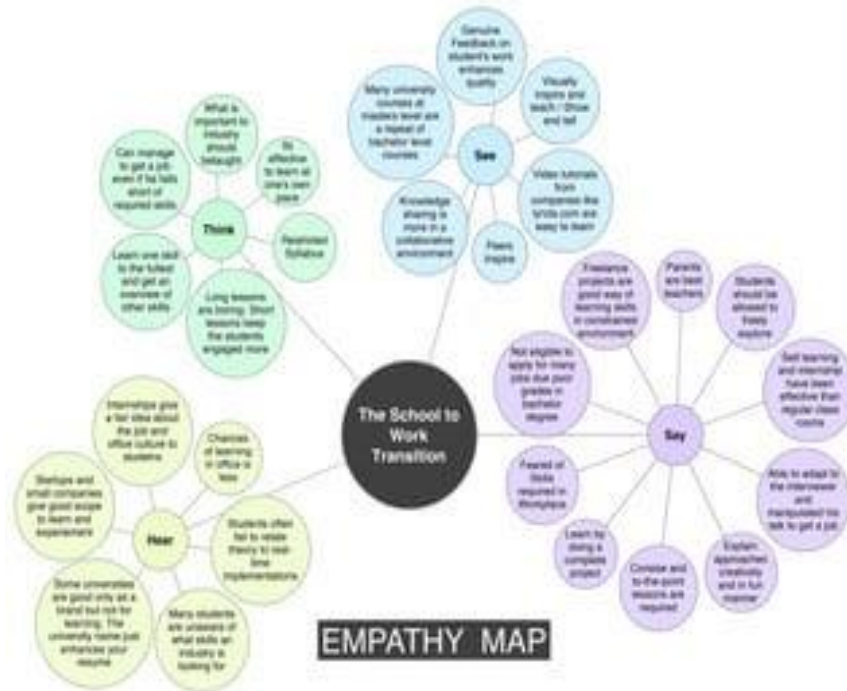
## **1.2 Purpose**

Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

CRM can be achieved by: **Finding out about your customers' purchasing habits, opinions and preferences.** profiling individuals and groups to market more effectively and increase sales. changing the way you operate to improve customer service and marketing.

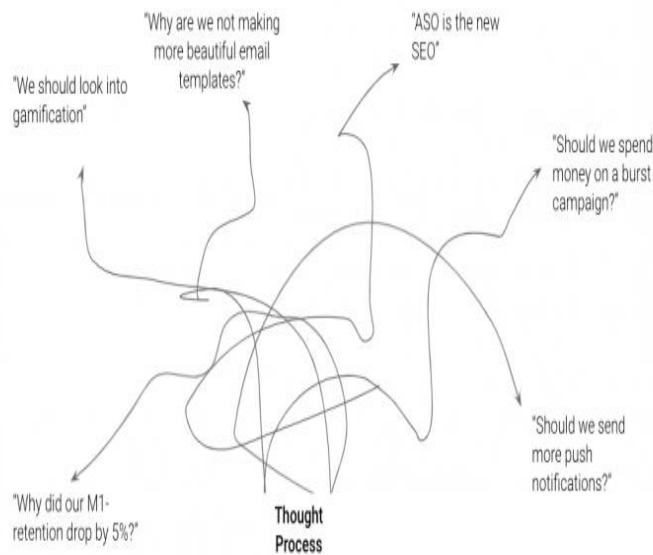
## **2. PURPOSE DEFINITION & DESIGN THINKING**

### **2.1 Emphathy map**



## 2.2 Ideation & Brainstorming Map

Even if there's growth, there's usually chaos

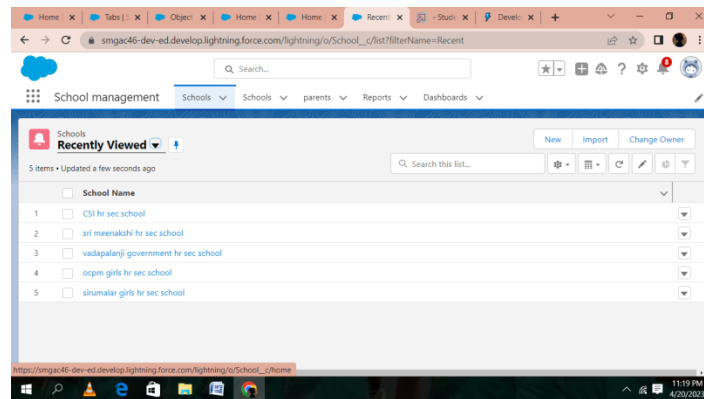


### 3 RESULT

#### 3.1 Data model:

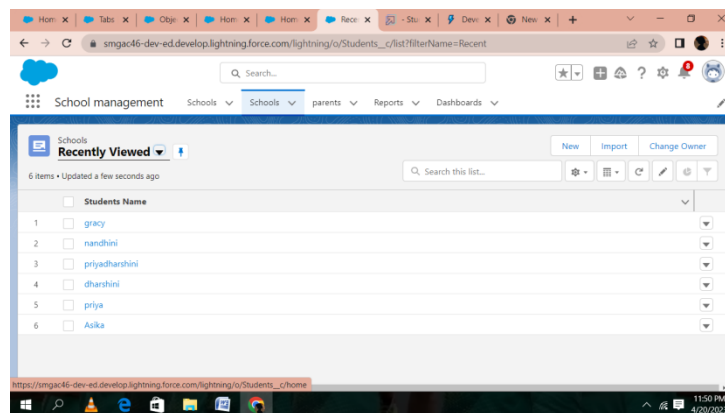
Obj 1 SCHOOL		
	Field lable	Data type
	Address	Text area
	Phone number	Phone
Obj 2 STUDENTS		
	Field lable	Data type
	School	Master-detail relationship
	Results	Picklist
Obj 3 PARENT		
	Field lable	Data type
	Parent address	Text area
	Parent number	Phone

## 3.2 Activity & Screenshot



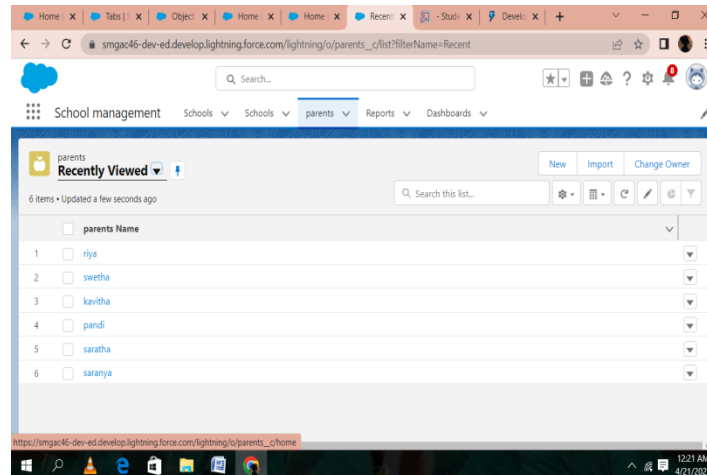
### Description:

In this school object is an educational institution designed to provide learning spaces and learning.



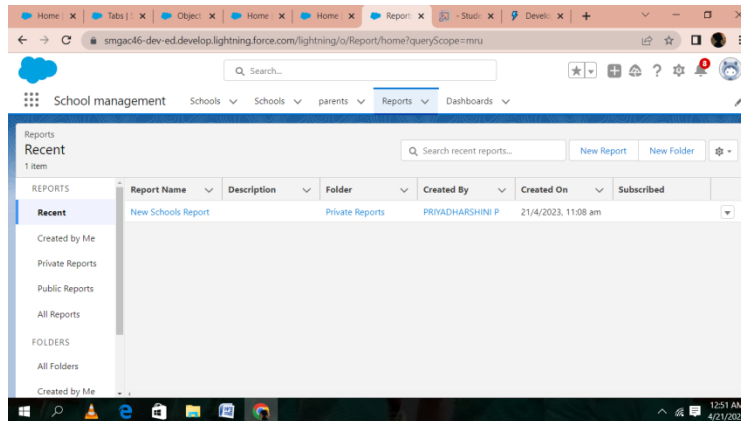
## Description:

The custom student id field is a low-complexity customization, which means it's not difficult to build. However, using this field in an integration involves some additional complexity that's best handled by an integration specialist.



## Description:

To parent object, select at least two objects and press ctrl-P. The set parent to menu will pop up allow in you to select from one of several possible different parenting types. The object to which a given property or method belongs. My Parents are my strength who support me at every stage of life.



## Description:

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

## 4. TRAILHEAD PROFILE PUBLIC URL

Team lead – <https://trailblazer.me/id/priya173>

Team Member 1- <https://trailblazer.me/id/p8priyadharshinip>

Team Member 2- <https://trailblazer.me/id/nandhini7>

Team Member 3- <https://trailblazer.me/id/priyadharshini7>



## **5 ADVANTAGES & DISADVANTAGES**

### **ADVANTAGES:**

Using best CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

The use of CRM in education industry is important for many reasons. A CRM system can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over time.

Using a CRM system provides educational organisation with the data they need to make informed decisions about recruitment, marketing, and other key areas. It also allows you to improve student engagement by tracking student interactions and providing personalised communication. Furthermore, a CRM system can improve communication between different departments within an organisation and help to increase efficiency and productivity. In short, a CRM system is an essential tool

for any educational organisation to improve enrolments, lead management, communication and student engagement.

## DISADVANTAGES:

\*CRM costs. One of the greatest challenges to CRM implementation is cost. ...

\* Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...

\*Poor communication. ...

\* Lack of leadership.

Another disadvantage is that you can only apply for early decision at one school, so it's important to know without a doubt that you can attend that school and pay the tuition costs. If you reject an early decision offer, you cannot apply to that college again.

- Sometimes, brilliant students get bored because of the long tenure of academic sessions.
- Exams and grades can sometimes lead to stress and anxiety.
- It is costly and rigid.
- An unprofessional and non-standard education system may also cause wastage of time and money.

Modern education which is technology based has affected social interaction among students a lot. They feel less motivated and lack peer interaction and motivation. Sometimes they feel bored as there is not much communication between teachers and peers.

However, for some students, hearing back so quickly may make them feel compelled to make a decision quickly as well, before they've even heard back from their regular decision schools. Parents could also be putting pressure on their kids to make a decision. It's important to take it slow and weigh all your options – there *is* time to make your choice carefully.

## **6 APPLICATIONS**

Customer relationship management (CRM) is a set of integrated, data-driven software solutions that help manage, track, and store information related to your company's current and potential customers.

1 . Choose the CRM Type, Roles, and Platforms. Types of CRM Systems. Learn What User Roles Your CRM System Needs. Select Which Platforms to Support.

2 . Deciding On CRM Features. Crucial features. Main features. ...

3. Calculating the CRM Development Budget.
4. Booking For a Technical Contractor.
5. Training.

CRM stands for Customer Relationship Management, and it's a technology for managing and supporting customer relationships.

A CRM system increases the number of leads coming in, helping your marketing team find new customers faster. It supports your sales teams in closing more deals faster. It also enhances customer service. The use of CRM in education industry is important for many reasons. A CRM system can help educational organisations effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalising communication and providing automated follow-up, educational organisation can build better relationships with students and leads, and keep them engaged over time.

## **7 CONCLUSION**

From this study it can be concluded that the customer relationship management in Company is satisfactory. The company is using various CRM practices like custom ization of the product, maintaining interaction with the customers regularly and providing good quality product etc.

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.

Customer relationship management (CRM) is important in running a successful business. The better the relationship, the easier it is to conduct business and generate revenue. Therefore using technology to improve CRM makes good business sense.

## **8 FUTURE SCOPE**

“[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations.

The ultimate goal of the discipline of customer relationship management, and associated CRM systems, is efficiently managing and improving business relationships.