DOCUMENT

OF OUR PROJECT USING SALESFORCE AND SMARTINTENZ

A CRM APPLICATION SCHOOL/ COLLEGES

BY

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A CRM APPLICATION FOR SCHOOL / COLLEGES

PROJECT REPORT

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INTRODUCTION

1.1 Overview

A CRM is a system that helps schools manage the entire lifecycle of a potential customer sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place. 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. By keeping this information in a centralised system, business teams have access to the insights they need, the moment they need them. Without the support of an integrated CRM solution, your company may miss growth opportunities and lose potential revenue because it's not optimising operating processes or making the most of customer relationships and sales leads.

1.2Purpose

A CRM system can help educational organistation effectivery mange and track leads, resulting in improved enrolment number

What is the purpose of CRM software in a business? Basically, it helps nurture relationships with customers for long-term sales. Although the underlying principle in CRM is not to squeeze out more profits but to make customers happy, which in turn results in product loyalty and more revenues for the business.

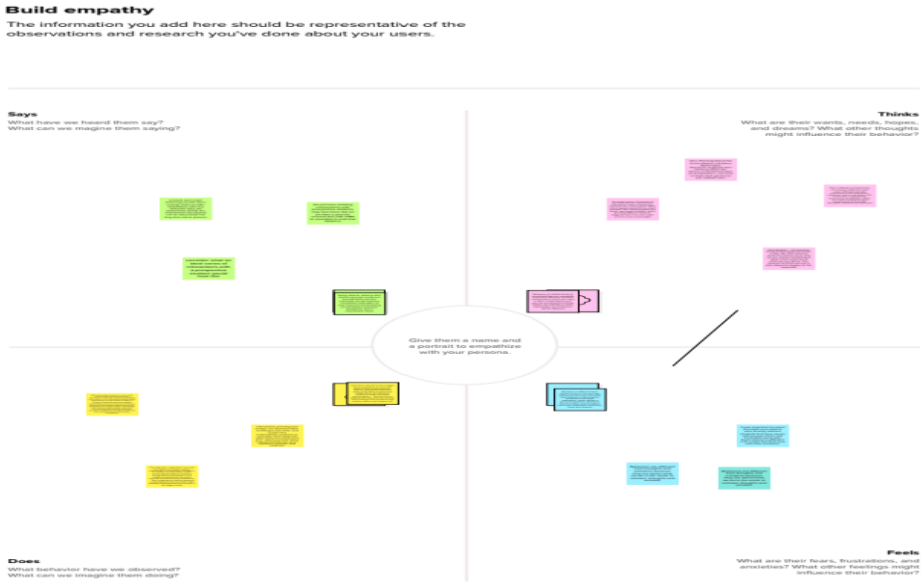
In this guide, you'll find more detailed answers on the fundamental aspects of CRM software. We'll discuss some of its most important benefits, potential issues you might face with the platform, and some best practices when implementing the software.

Towards the end, we'll provide a list of CRM products where we'll highlight different features and pricing details. There are also handy links to free trials so you can quickly get started on your CRM journey.

Ultimately, the answer to the question—what is the purpose of CRM software in a business?—is to provide all the essential tools for businesses to retain customers and, through it, achieve sustained sales growth. You may think of **CRM software platforms** as your main clearinghouse for every information that would matter when dealing with your company's clients, from complaints or purchase history and patterns, how your sales and marketing have performed against the latest company marketing and loyalty drives, to as-of-yet unexploited areas that offer great potential for upselling and cross-selling, among others.

Problem definition & Design thinkin

2.1 EMPATHY MAPING



2.2 IDEATION & BRAINSTORMING MAP

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.

20 minutes

But there are many alternative exercises for tackling problems and developing new ideas, both individually and in a group setting.

Ranging from structured to silly, here are the best creative brainstorming exercises and techniques to help you get your problem-solving juices flowing. This list is a modified excerpt from my guideWe're all familiar with traditional brainstorming as a way to produce new ideas. You sit in a room with a whiteboard and work with whatever comes to mind. Maybe you play a few rounds of word association to strengthen your ideas, or pull up Google and use research to flesh them out.

TIP

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

2

Brainstorm

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

10 minutes

TIP

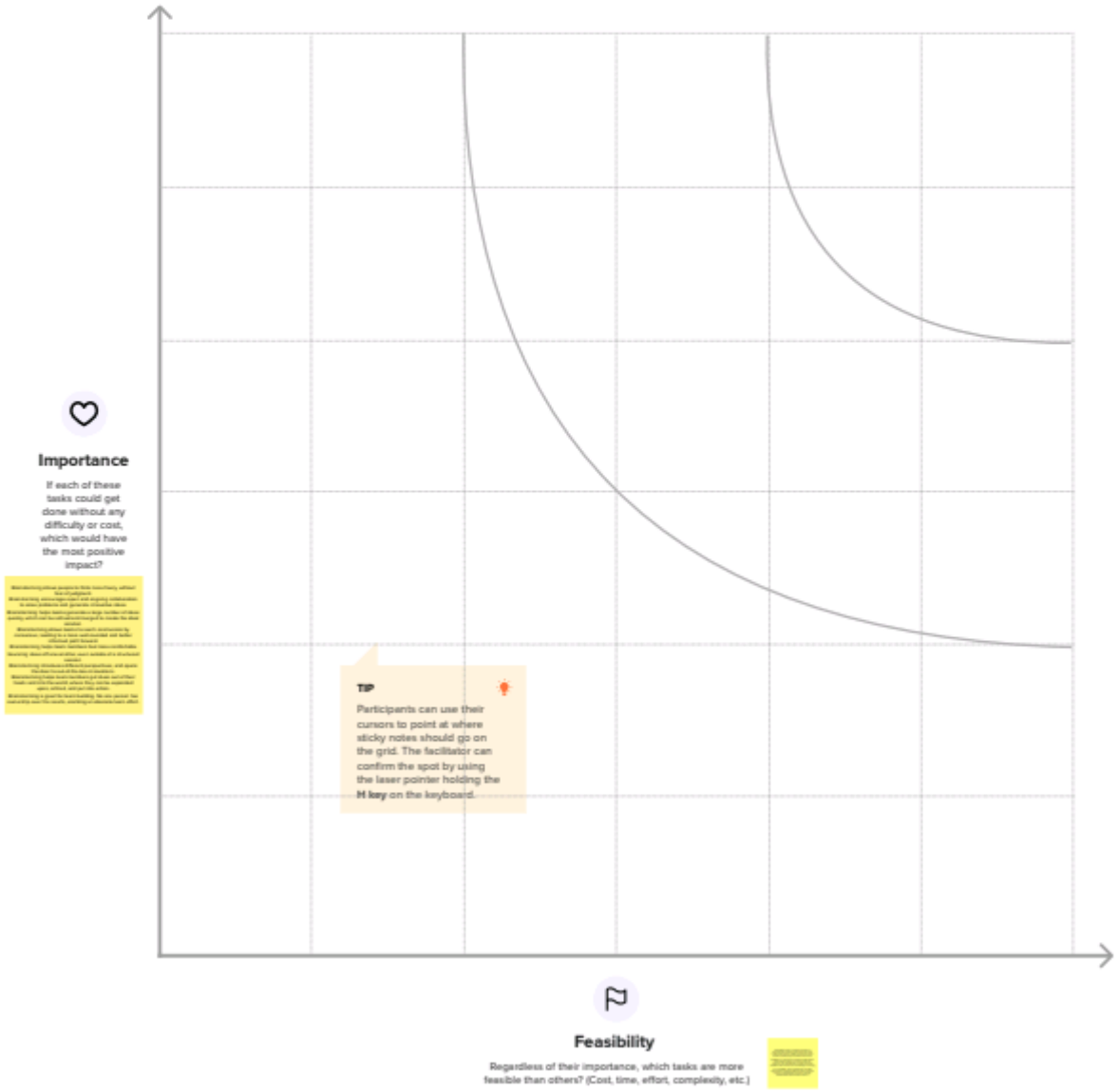
You can select a sti
and hit the pencil [e
sketch] icon to start

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

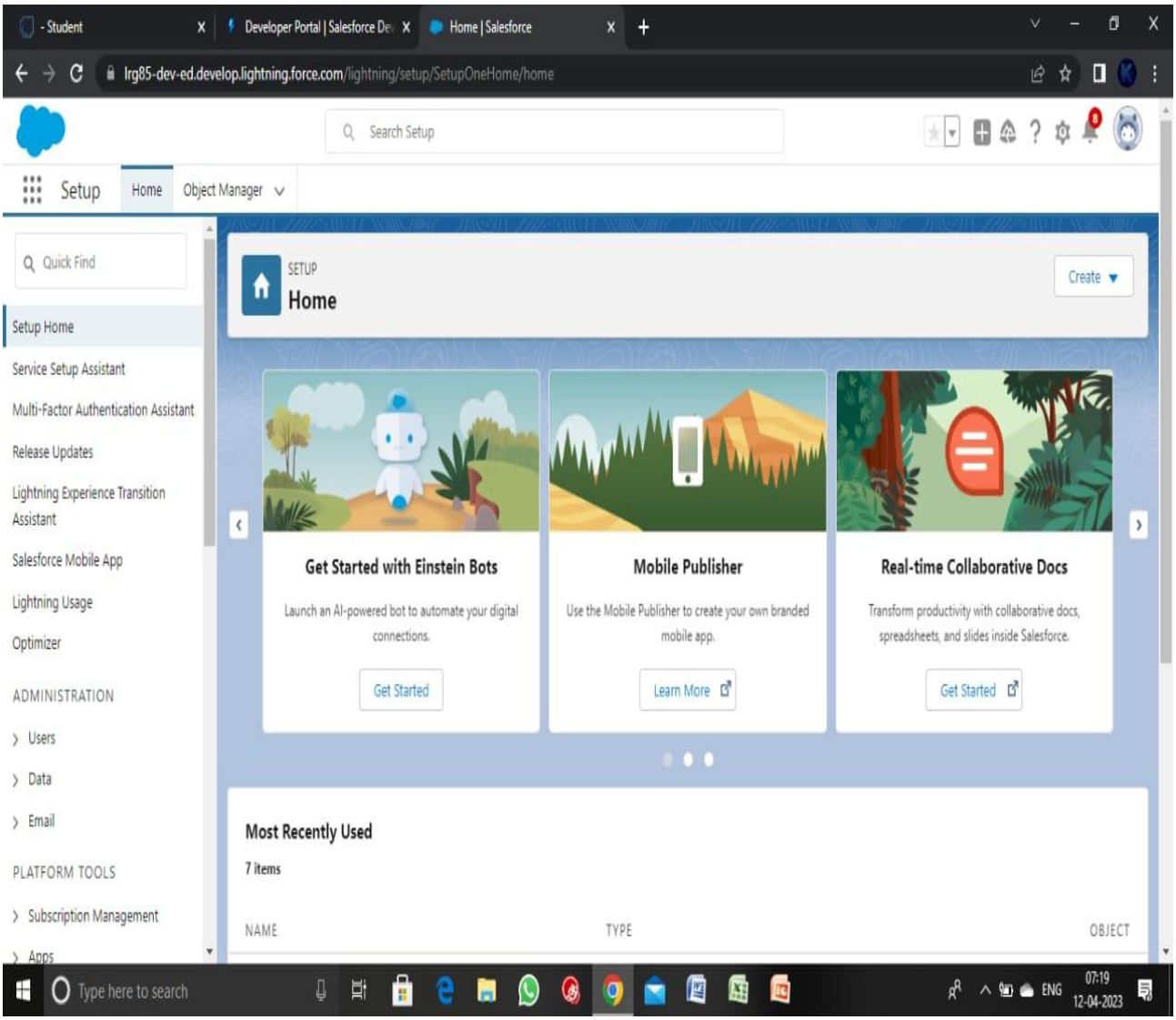
20 minutes

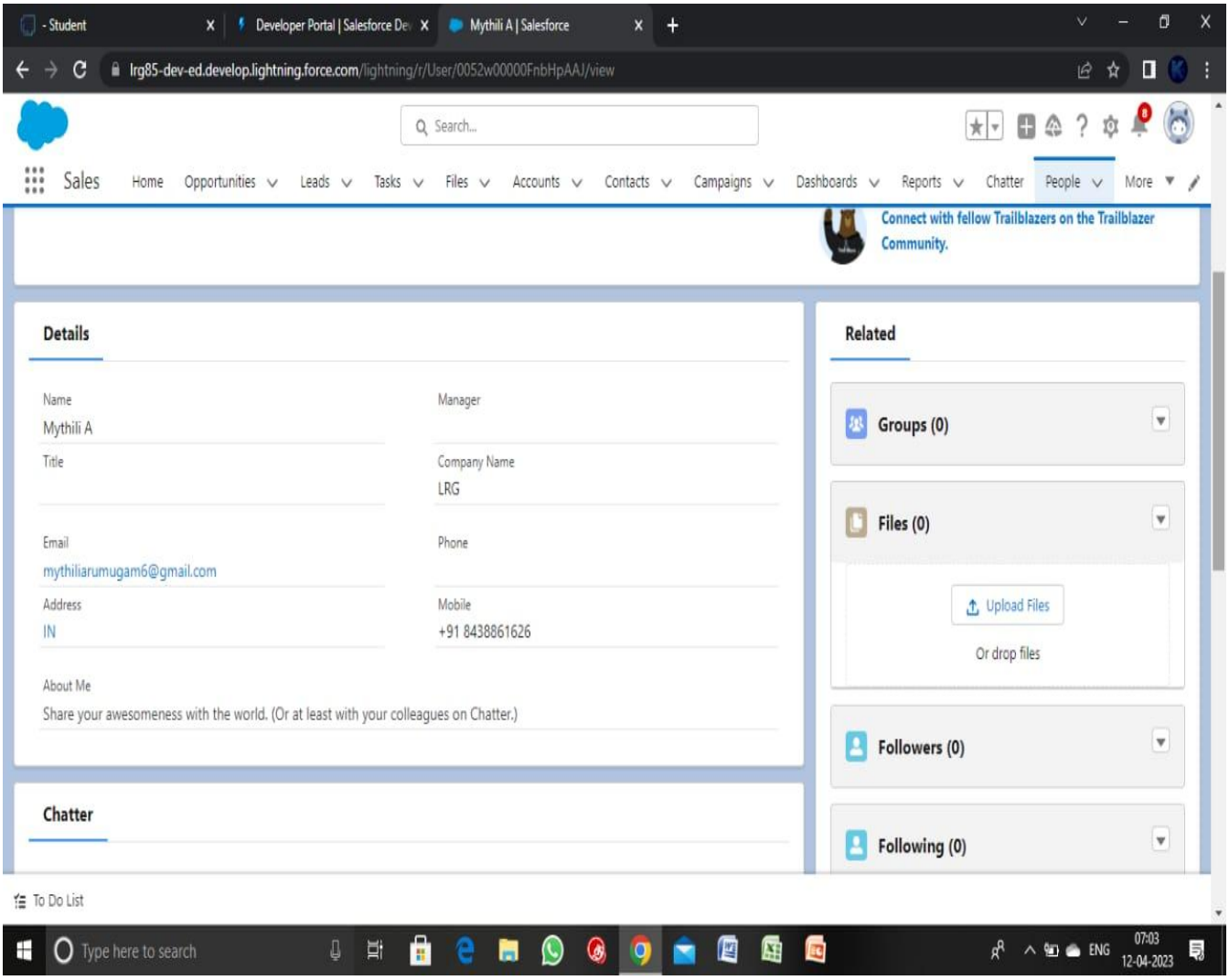


3.1 DATA MODEL

OBJECT NAME	FIELDS IN OBJECT
OBJECT 1	FIELD LABLE : SCHOOL DATA TYPE : CUSTOM OBJECT
OBJECT 2	FIELD LABLE : SCHOOL DETAILS DATA TYPE : CUSTOM OBJECT

3.2 Activity screenshot

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Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
People
More
Connect with fellow Trailblazers on the Trailblazer Community.
Details
Name
Mythili A
Manager
Title
Company Name
LRG
Email
mythiliarumugam6@gmail.com
Phone
Address
IN
Mobile
+91 8438861626
About Me
Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)
Chatter
Related
Groups (0)
Files (0)
Upload Files
Or drop files
Followers (0)
Following (0)
To Do List
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ENG
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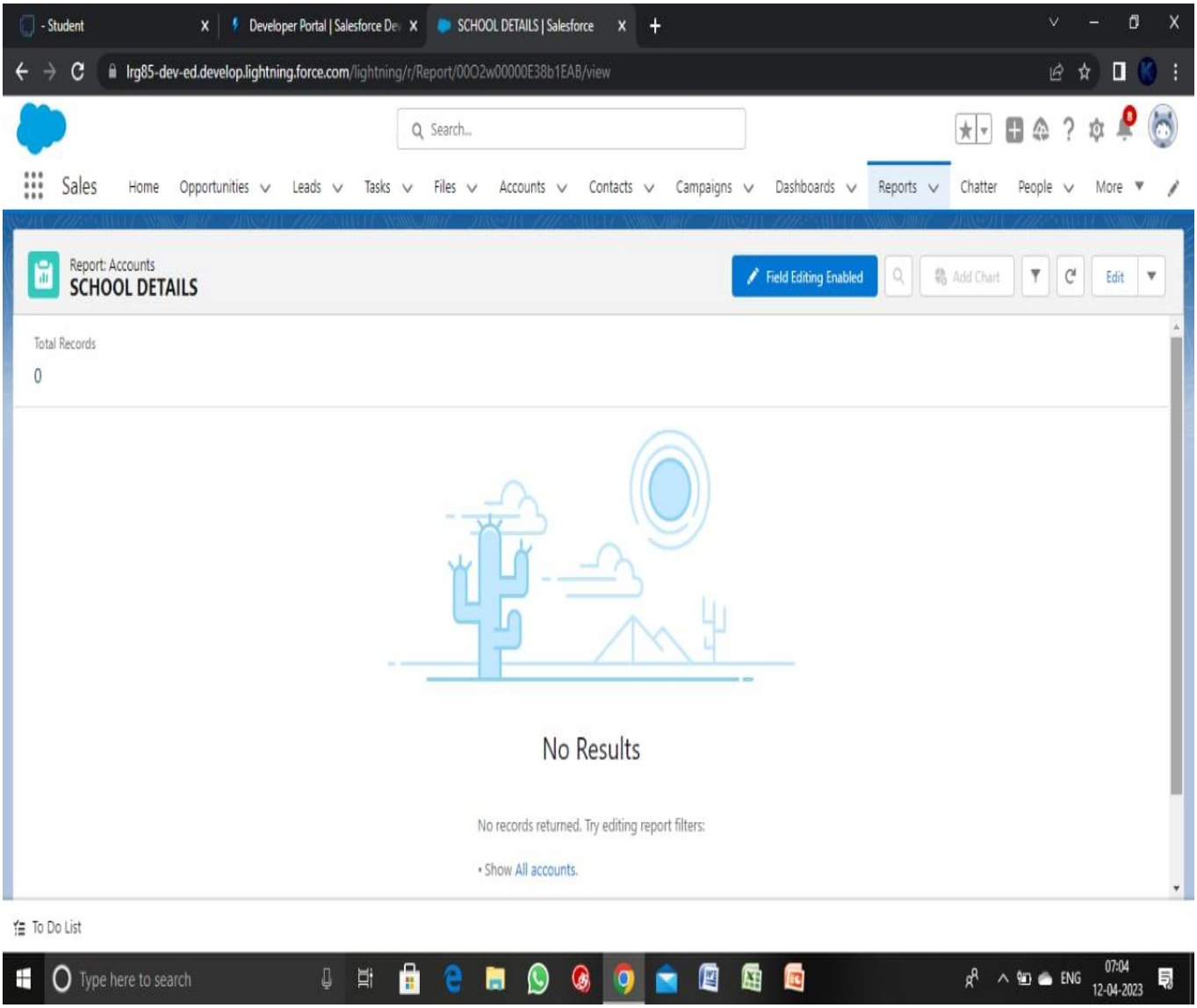
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Search...
Sales
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Opportunities
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Contacts
Campaigns
Dashboards
Reports
Chatter
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Field Editing Enabled
Add Chart
Edit
Total Records
0
No Results
No records returned. Try editing report filters:
• Show All accounts.
To Do List
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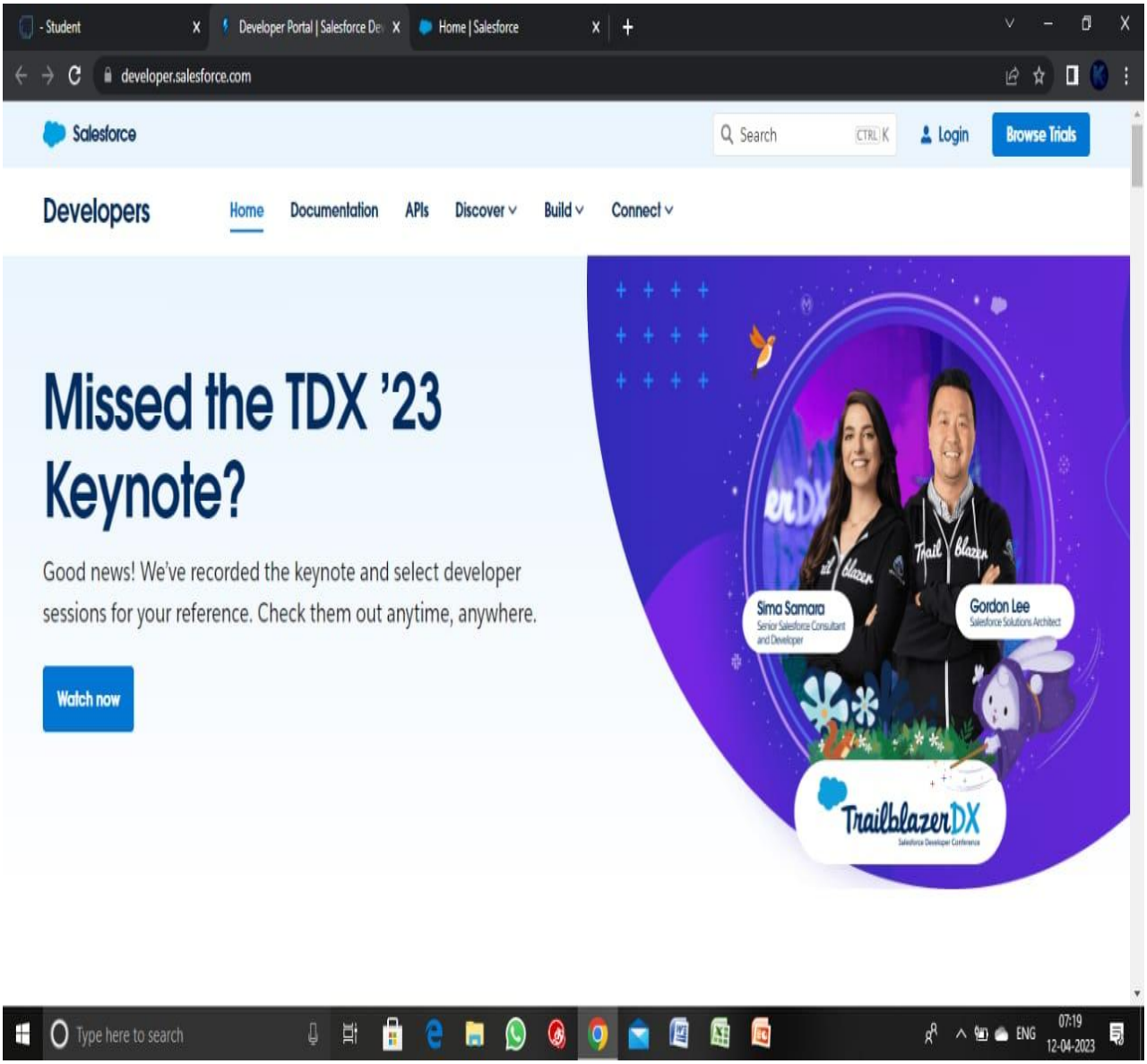
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developer.salesforce.com
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Developers
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Documentation
APIs
Discover
Build
Connect
Missed the TDX '23 Keynote?
Good news! We've recorded the keynote and select developer sessions for your reference. Check them out anytime, anywhere.
Watch now
Sima Samara
Senior Salesforce Consultant and Developer
Gordon Lee
Salesforce Solutions Architect
TrailblazerDX
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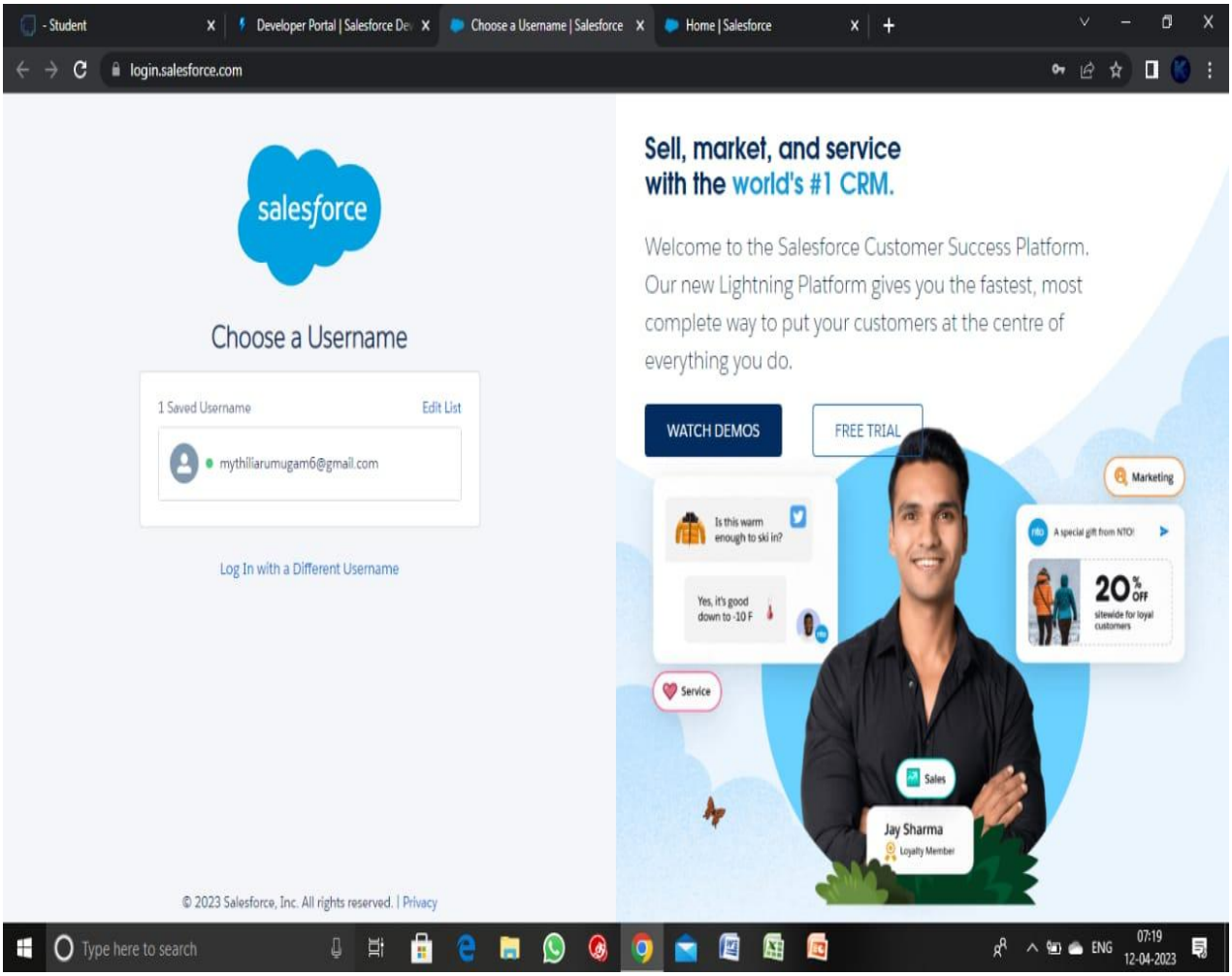
- Student
Developer Portal | Salesforce De
Choose a Username | Salesforce
Home | Salesforce
login.salesforce.com
salesforce
Choose a Username
1 Saved Username
Edit List
mythiliarumugam6@gmail.com
Log In with a Different Username
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Sell, market, and service with the world's #1 CRM.
Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.
WATCH DEMOS
FREE TRIAL
Marketing
Is this warm enough to ski in?
Yes, it's good down to -10 F
A special gift from NTO!
20% OFF
sitewide for loyal customers
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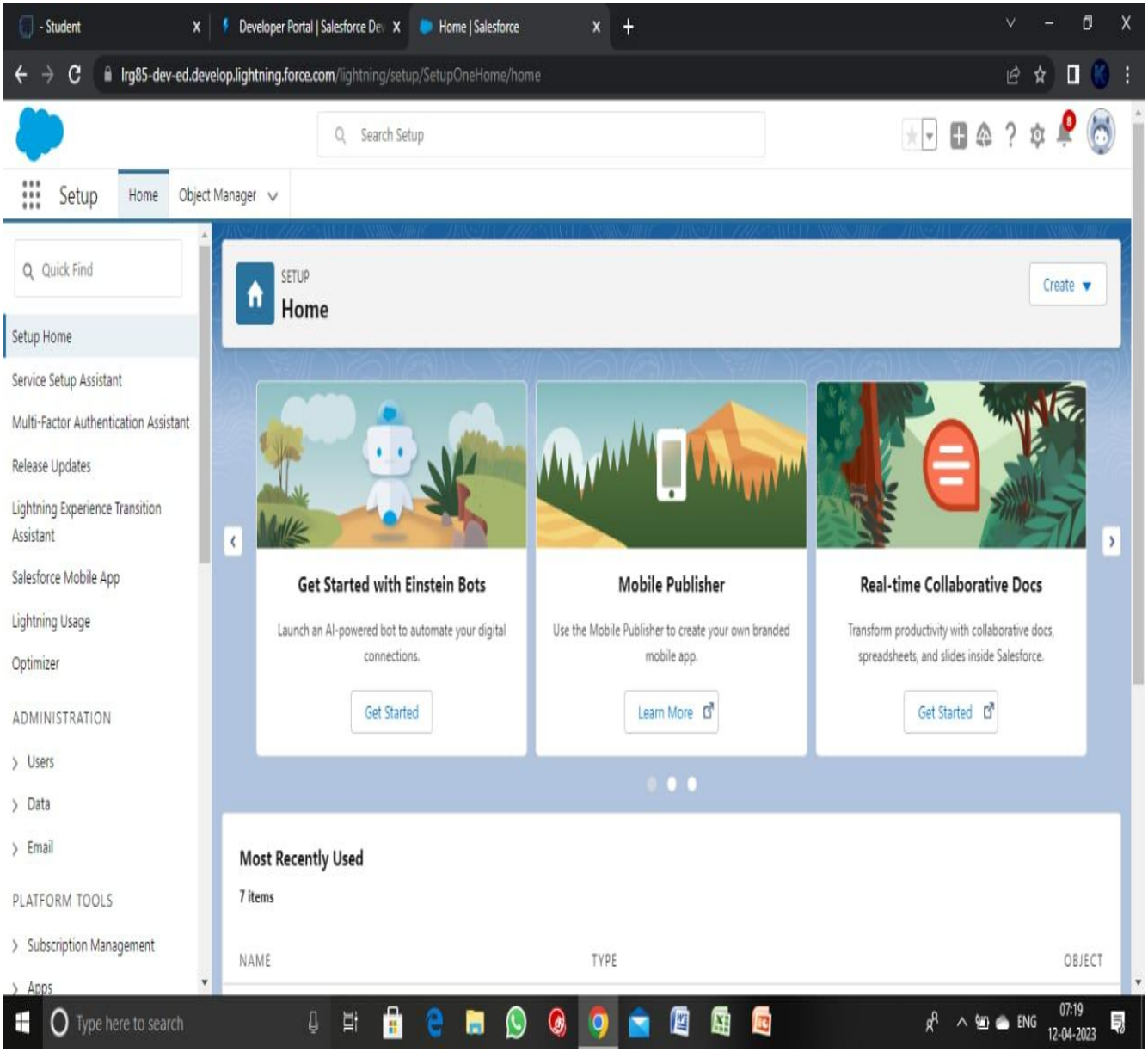
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Search Setup
Setup
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Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
7 items
NAME
TYPE
OBJECT
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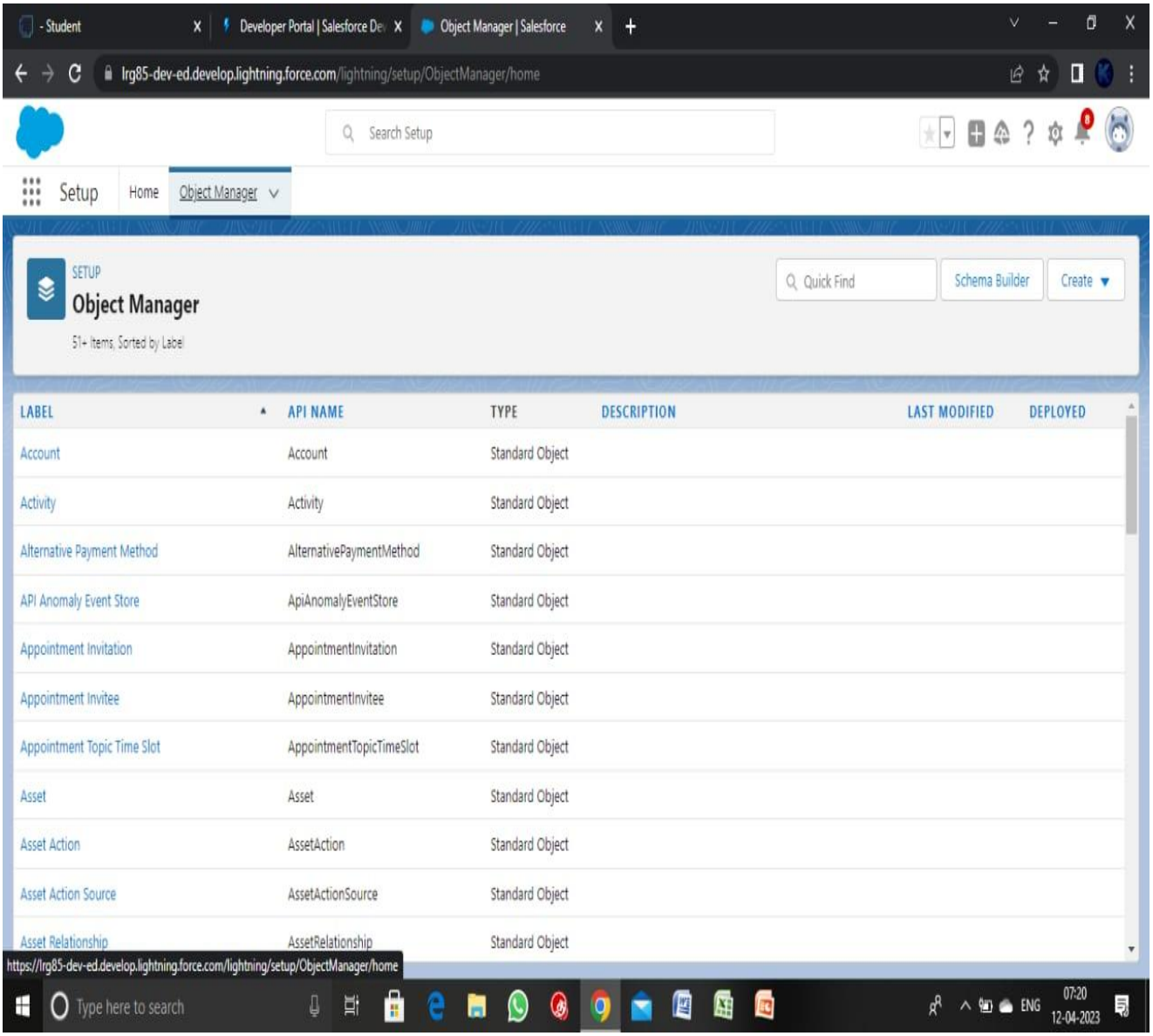
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51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
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DESCRIPTION
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DEPLOYED
Account Account Standard Object
Activity Activity Standard Object
Alternative Payment Method AlternativePaymentMethod Standard Object
API Anomaly Event Store ApiAnomalyEventStore Standard Object
Appointment Invitation AppointmentInvitation Standard Object
Appointment Invitee AppointmentInvitee Standard Object
Appointment Topic Time Slot AppointmentTopicTimeSlot Standard Object
Asset Asset Standard Object
Asset Action AssetAction Standard Object
Asset Action Source AssetActionSource Standard Object
Asset Relationship AssetRelationship Standard Object
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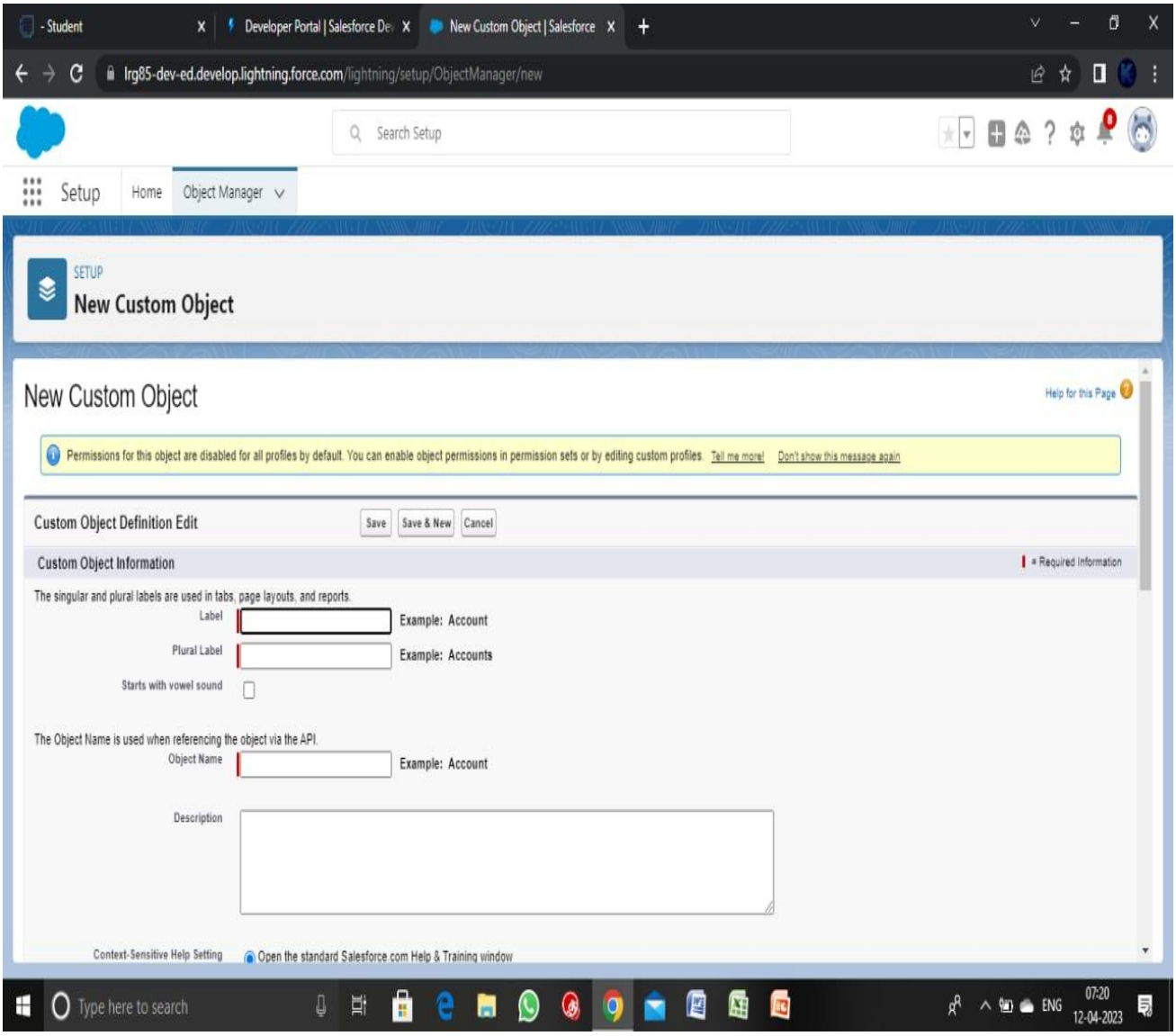
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New Custom Object | Salesforce
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Search Setup
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Home
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SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Example: Account
Plural Label
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
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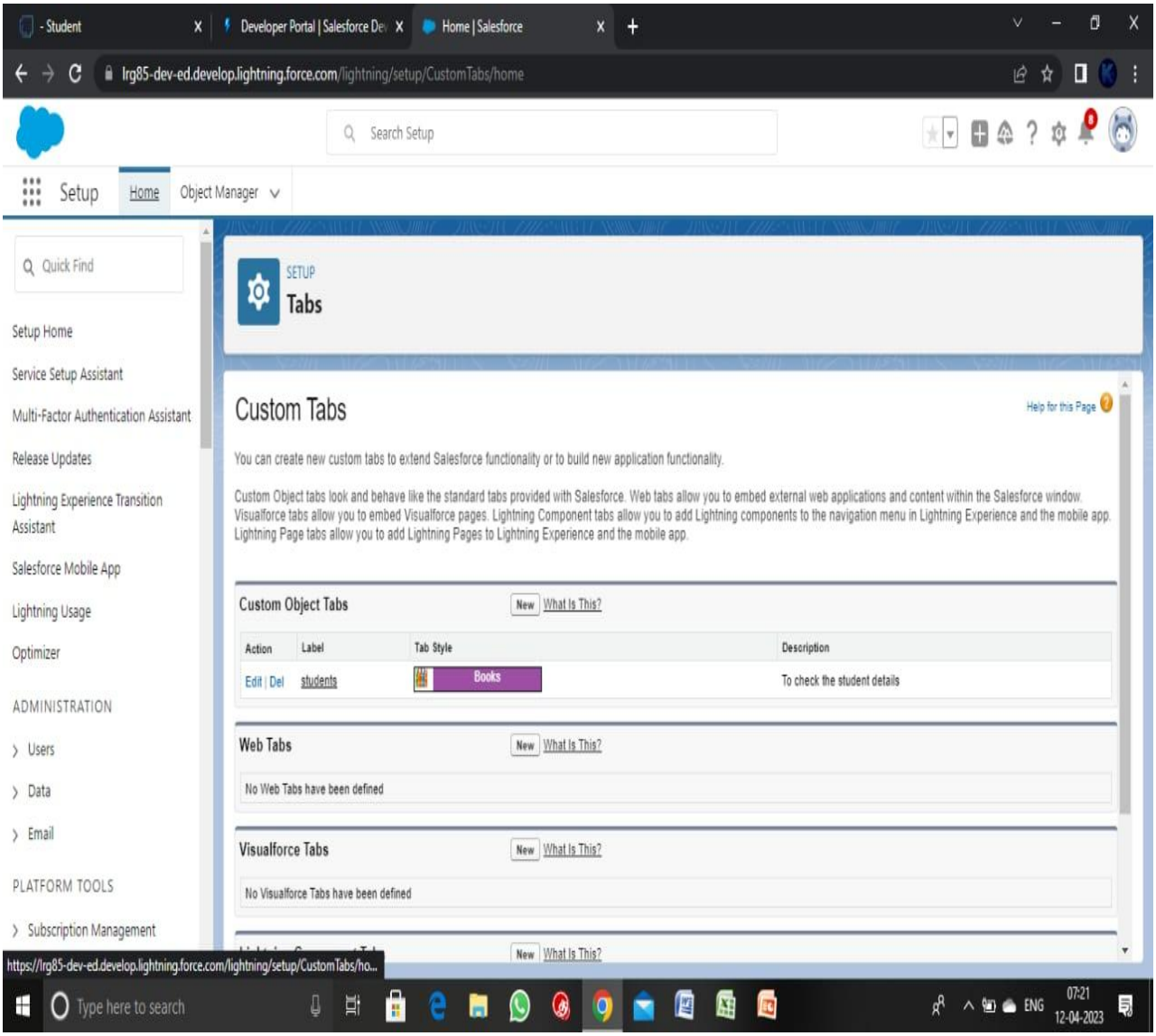
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Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
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Tab Style
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To check the student details
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Visualforce Tabs
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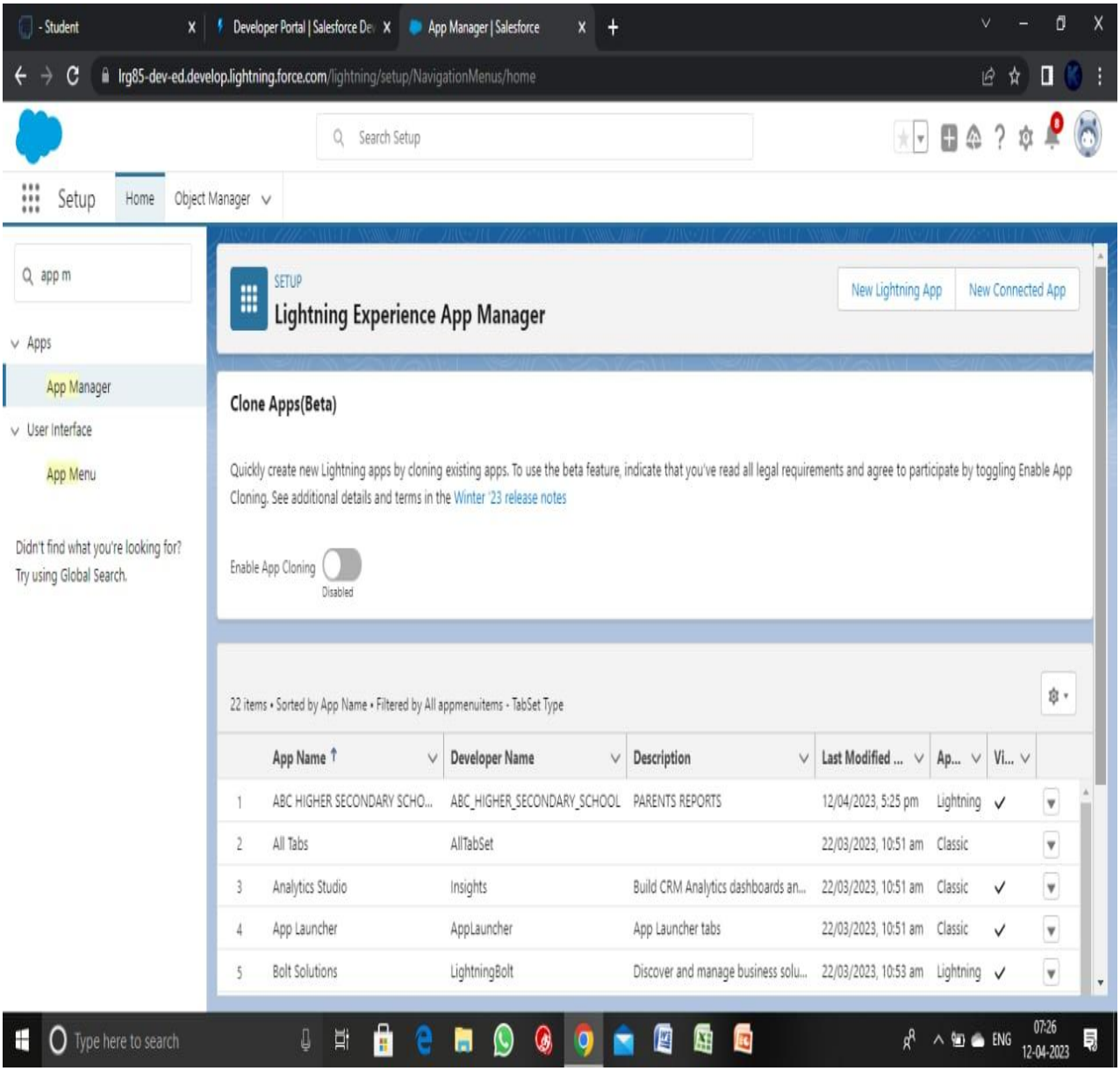
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App Manager
User Interface
App Menu
Didn't find what you're looking for?
Try using Global Search.
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
Clone Apps(Beta)
Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes
Enable App Cloning
Disabled
22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
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2 All Tabs AllTabSet 22/03/2023, 10:51 am Classic
3 Analytics Studio Insights Build CRM Analytics dashboards an... 22/03/2023, 10:51 am Classic
4 App Launcher AppLauncher App Launcher tabs 22/03/2023, 10:51 am Classic
5 Bolt Solutions LightningBolt Discover and manage business solu... 22/03/2023, 10:53 am Lightning
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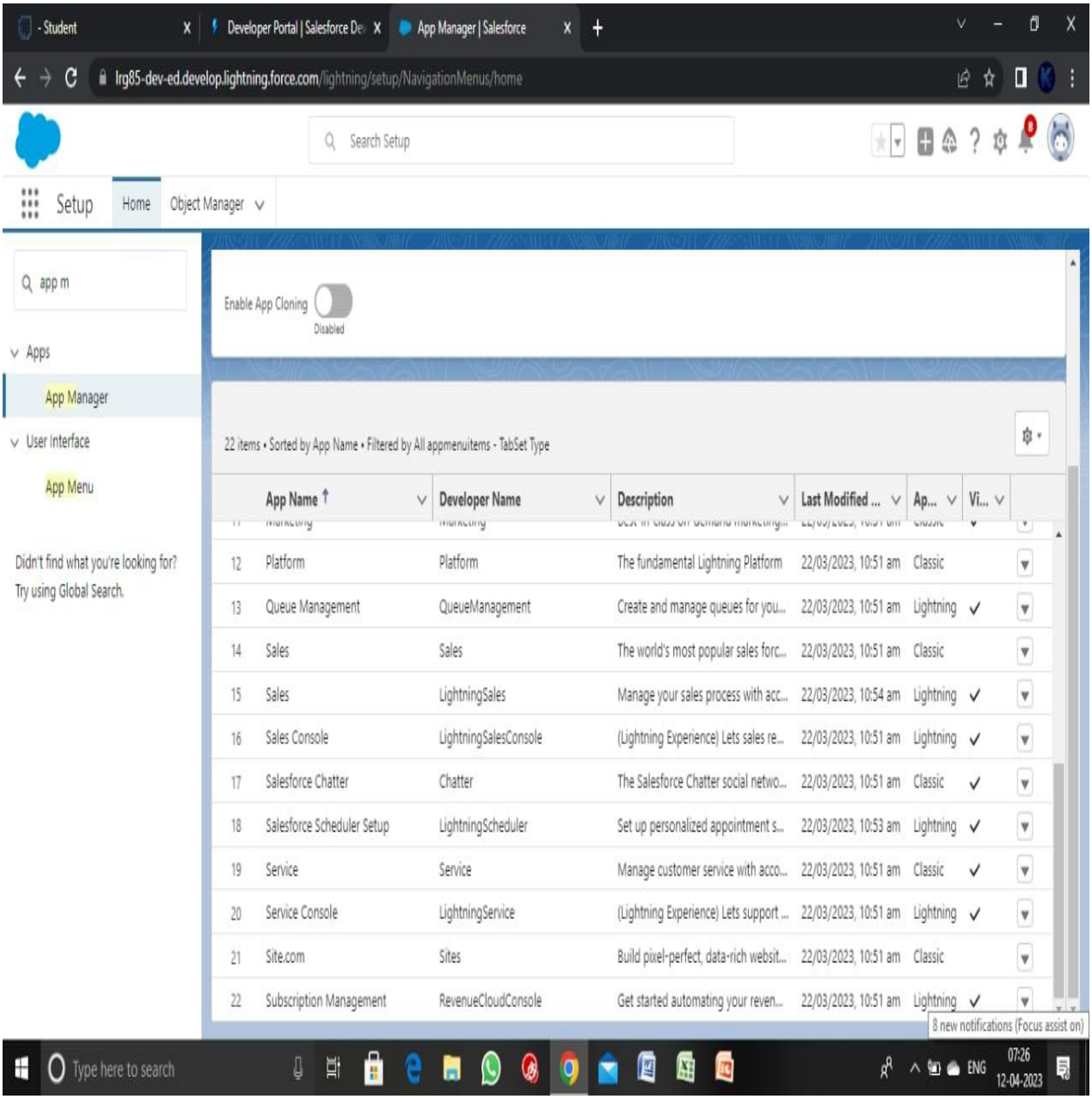
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Try using Global Search.
Enable App Cloning
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12 Platform Platform The fundamental Lightning Platform 22/03/2023, 10:51 am Classic
13 Queue Management QueueManagement Create and manage queues for you... 22/03/2023, 10:51 am Lightning
14 Sales Sales The world's most popular sales forc... 22/03/2023, 10:51 am Classic
15 Sales LightningSales Manage your sales process with acc... 22/03/2023, 10:54 am Lightning
16 Sales Console LightningSalesConsole (Lightning Experience) Lets sales re... 22/03/2023, 10:51 am Lightning
17 Salesforce Chatter Chatter The Salesforce Chatter social netwo... 22/03/2023, 10:51 am Classic
18 Salesforce Scheduler Setup LightningScheduler Set up personalized appointment s... 22/03/2023, 10:53 am Lightning
19 Service Service Manage customer service with acco... 22/03/2023, 10:51 am Classic
20 Service Console LightningService (Lightning Experience) Lets support ... 22/03/2023, 10:51 am Lightning
21 Site.com Sites Build pixel-perfect, data-rich websit... 22/03/2023, 10:51 am Classic
22 Subscription Management RevenueCloudConsole Get started automating your reven... 22/03/2023, 10:51 am Lightning
8 new notifications (Focus assist on)
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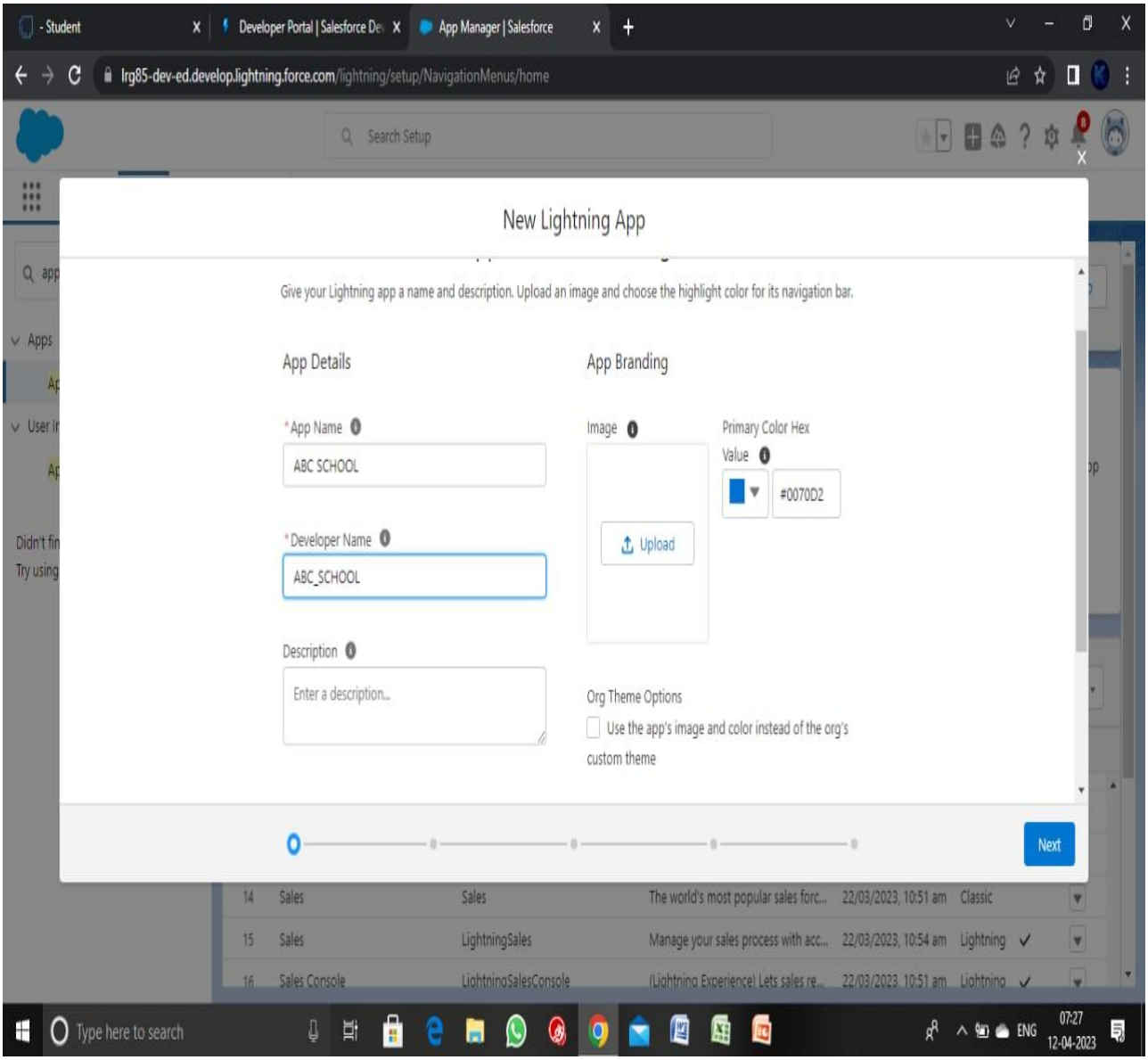
- Student
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Search Setup
New Lightning App
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
*App Name
ABC SCHOOL
*Developer Name
ABC_SCHOOL
Description
Enter a description...
Image
Upload
Primary Color Hex Value
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Org Theme Options
Use the app's image and color instead of the org's custom theme
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Apps
14 Sales Sales The world's most popular sales forc... 22/03/2023, 10:51 am Classic
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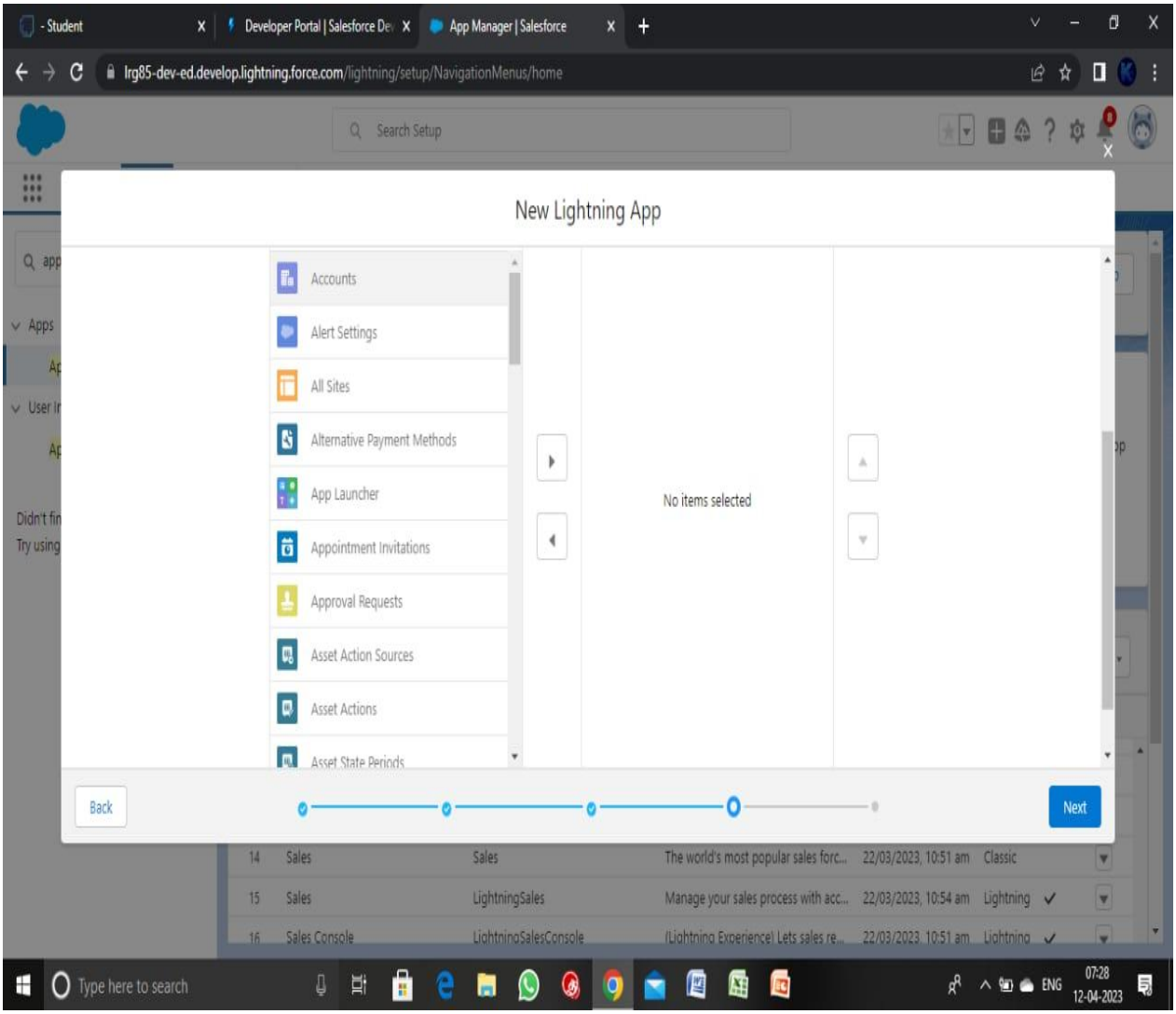
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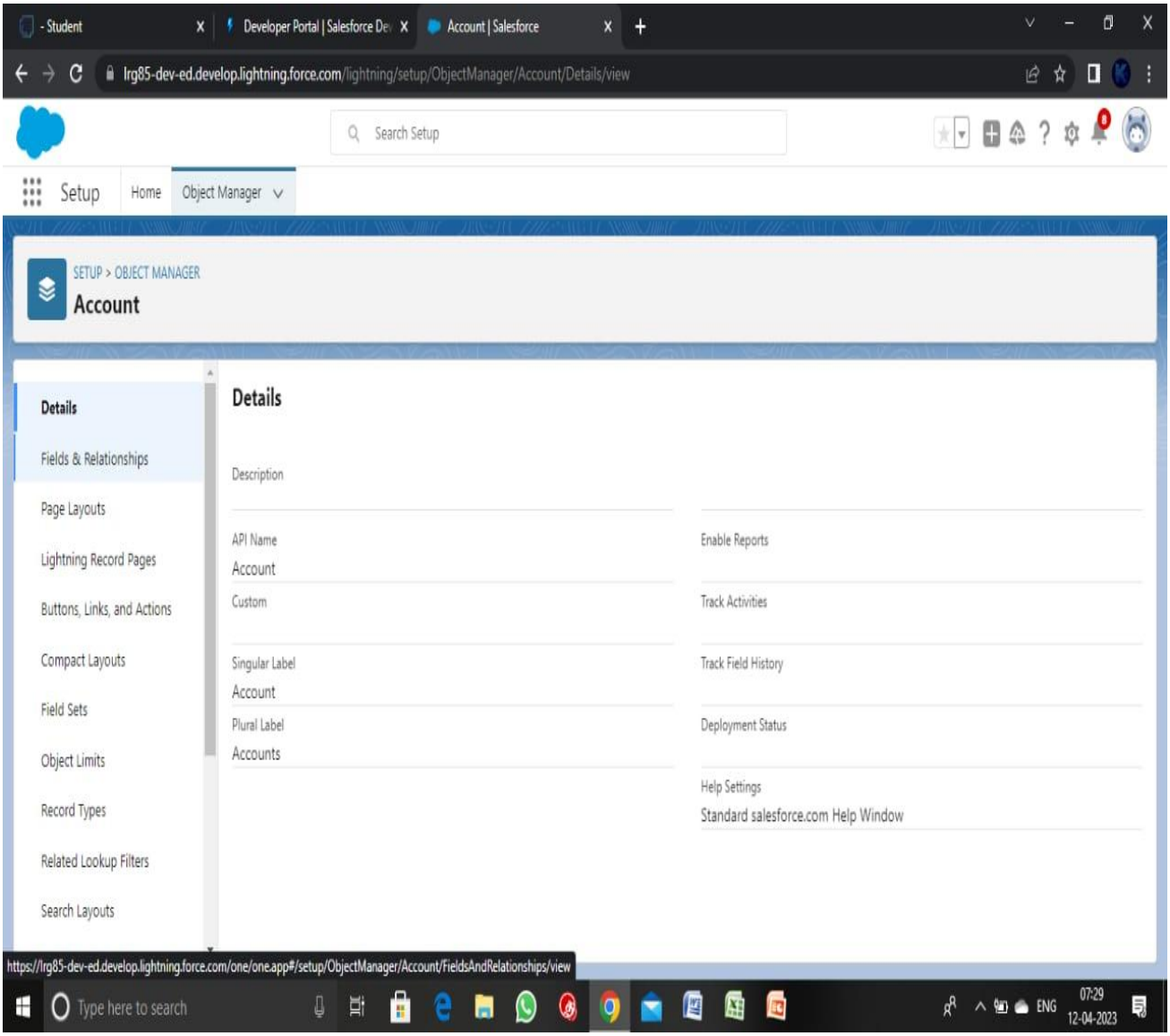
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Account | Salesforce
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Search Setup
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SETUP > OBJECT MANAGER
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Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
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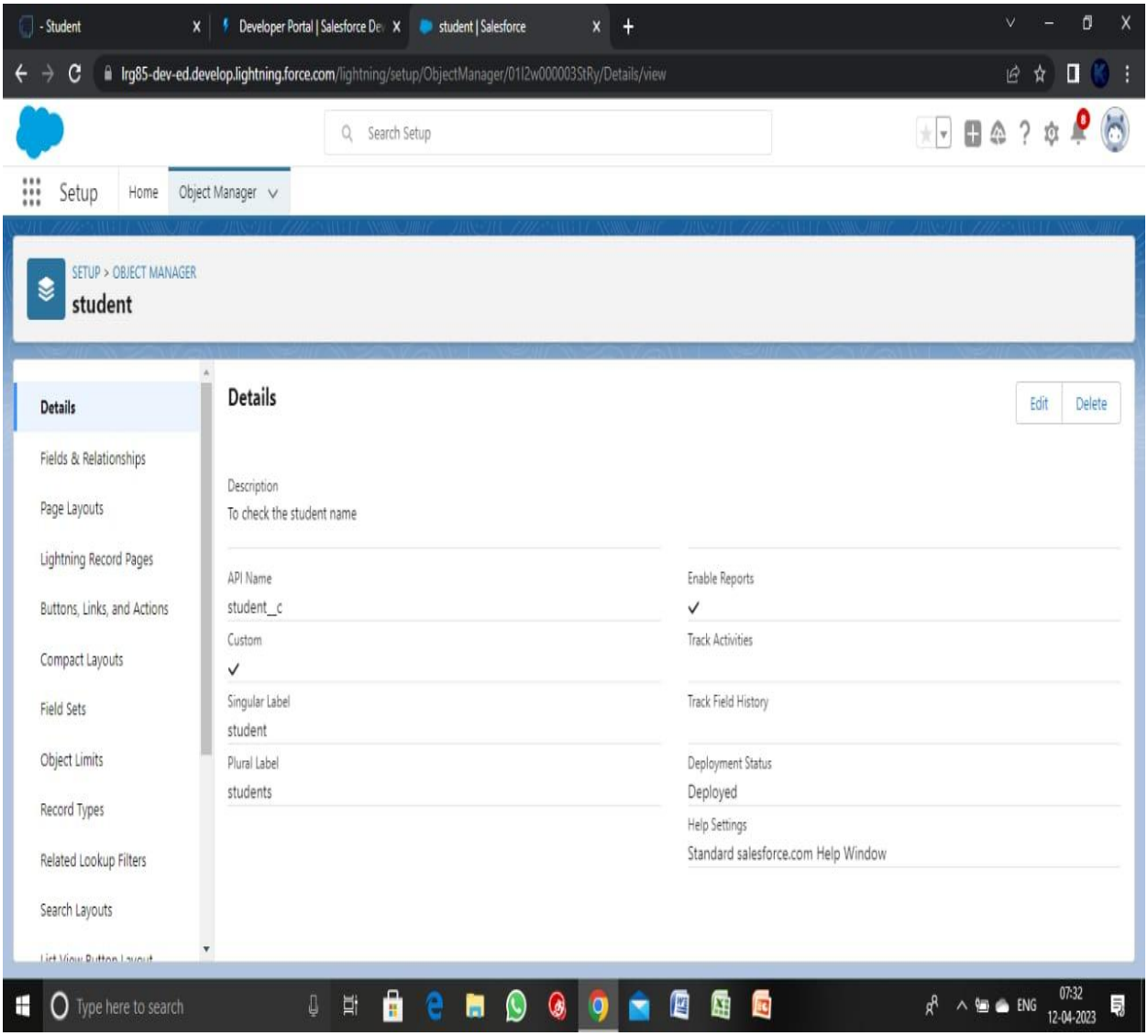
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Page Layouts
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Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
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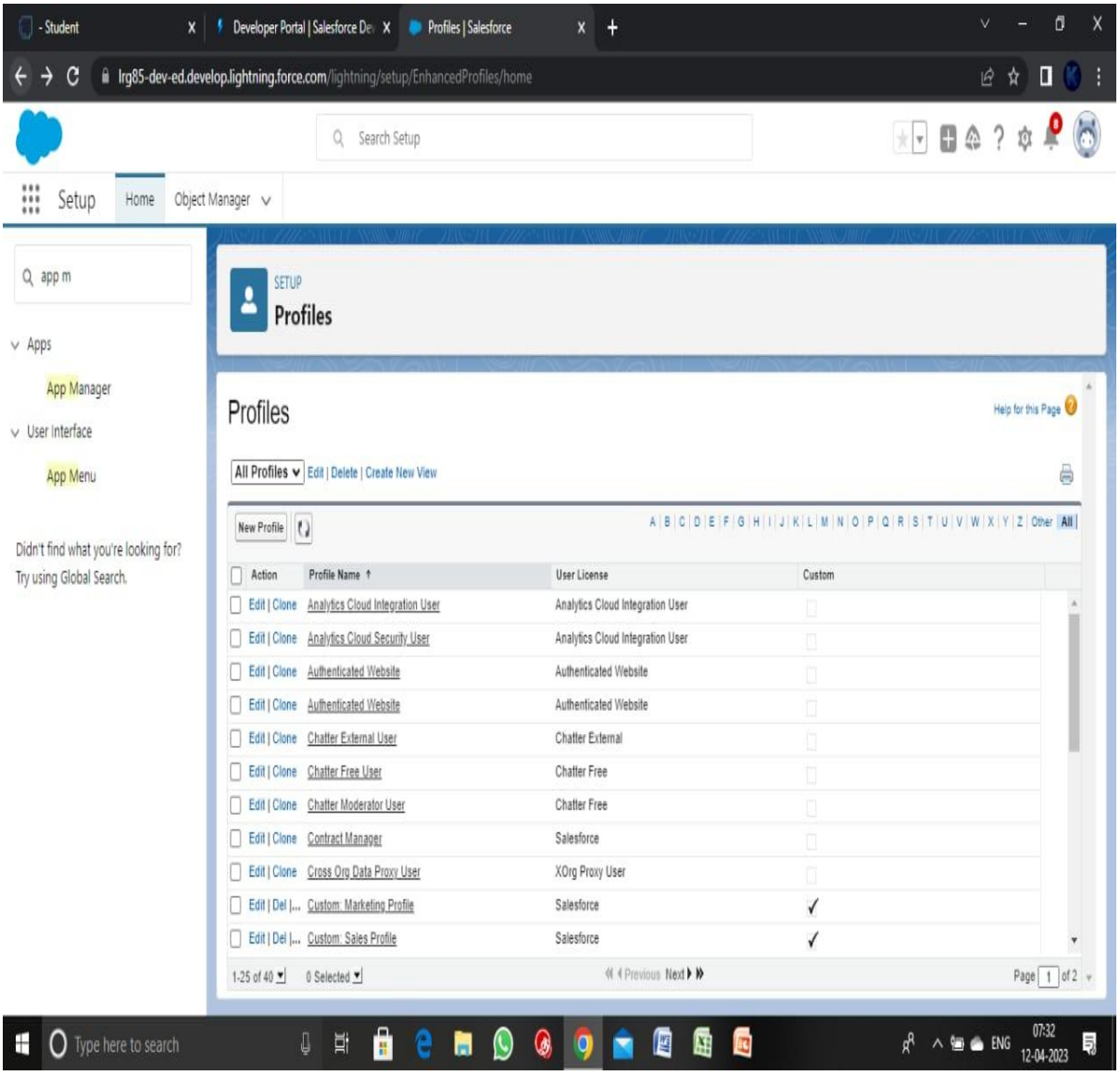
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
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Help for this Page
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Analytics Cloud Integration User
Analytics Cloud Integration User
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Page 1 of 2
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ENG
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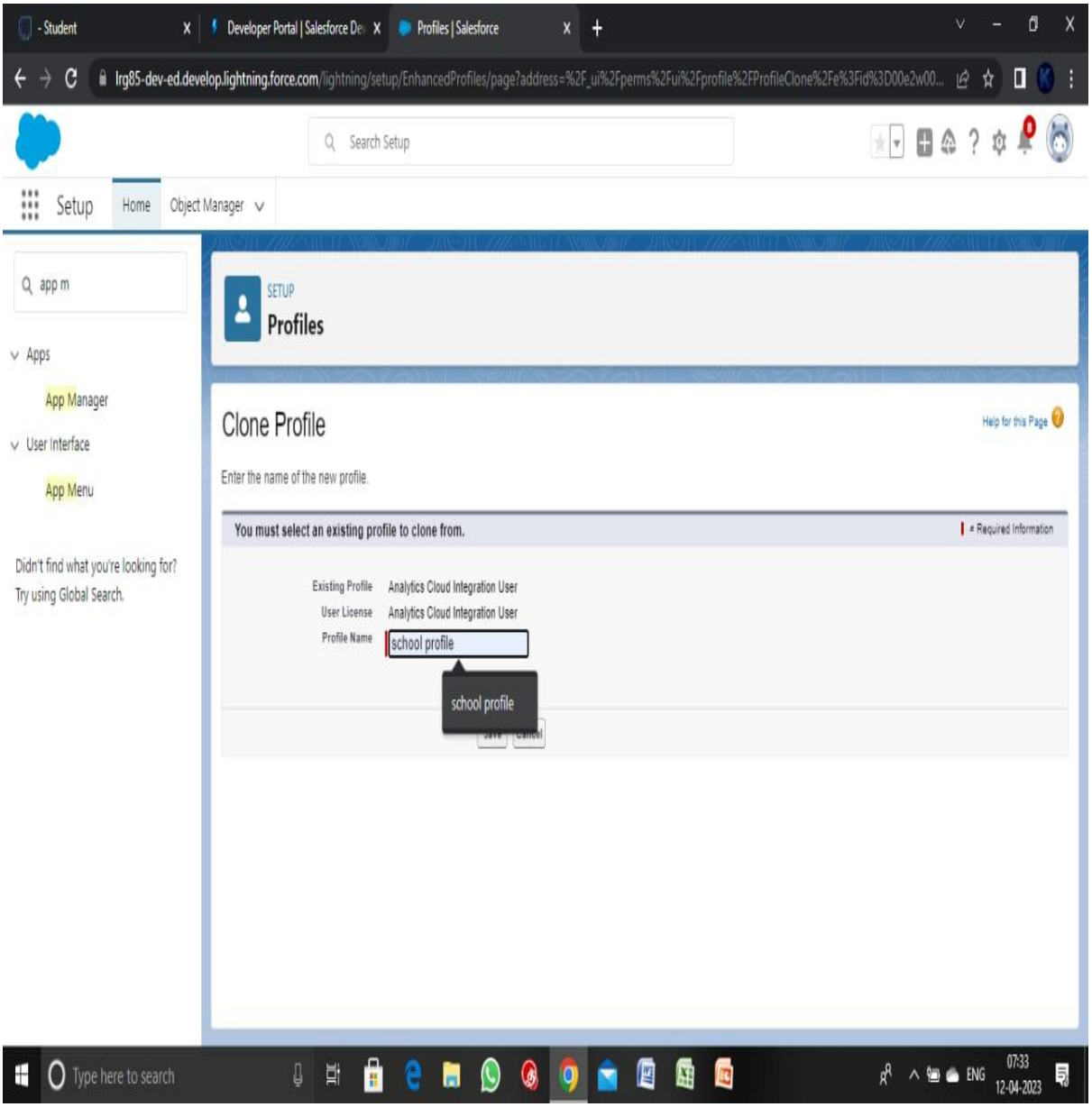
12-04-2023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lrg85-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e2w00...
Search Setup
Setup
Home
Object Manager
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Apps
App Manager
User Interface
App Menu
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Analytics Cloud Integration User
User License
Analytics Cloud Integration User
Profile Name
school profile
school profile
Type here to search
ENG
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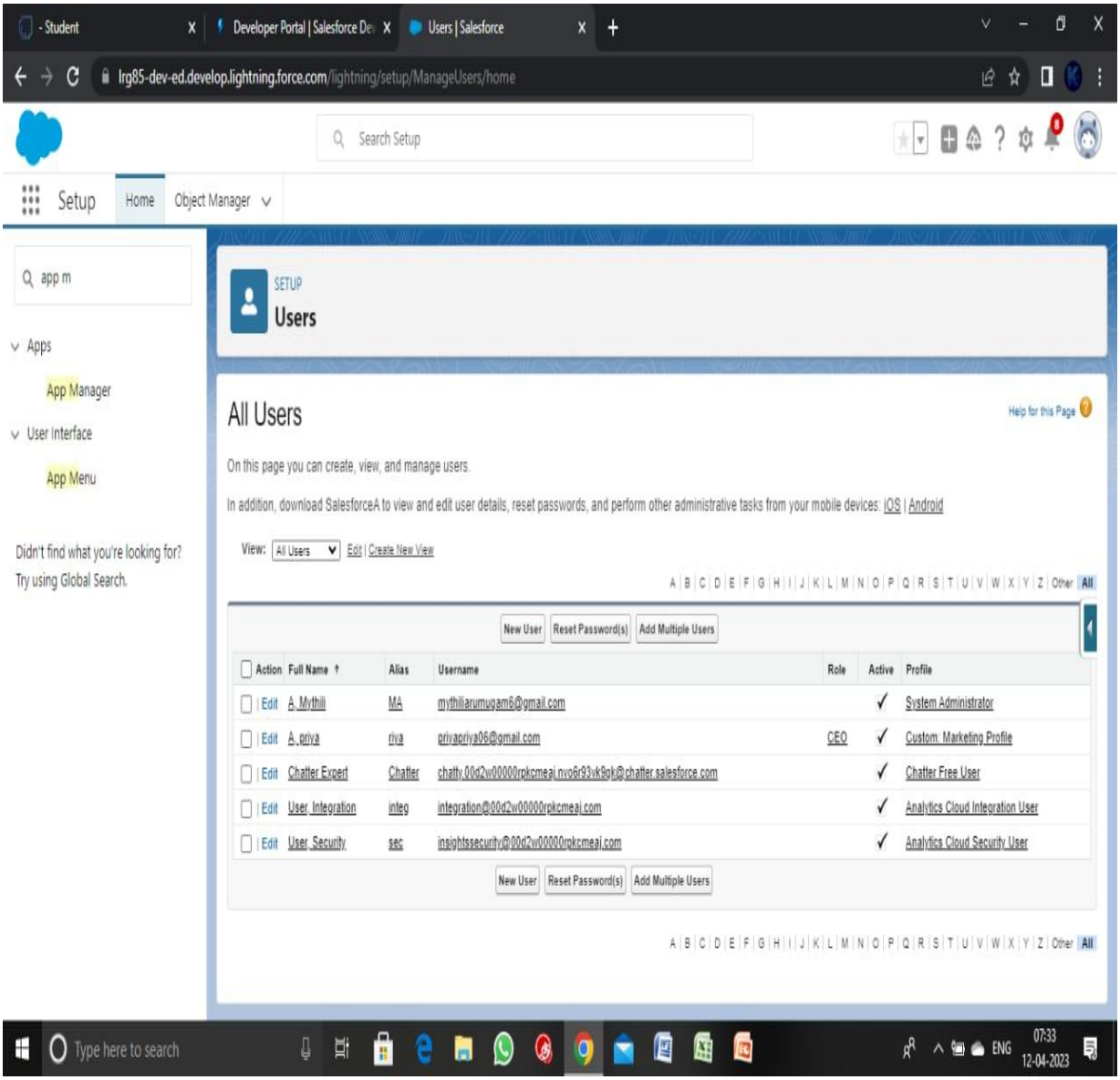
12-04-2023


- Student
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Users | Salesforce
lrg85-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Search Setup
Setup
Home
Object Manager
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Apps
App Manager
User Interface
App Menu
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
All Users
Help for this Page
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
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Edit A, Mythili MA mythiliarumugam6@gmail.com ✓ System Administrator
Edit A, priya riya priyapriya06@gmail.com CEO ✓ Custom: Marketing Profile
Edit Chatter Expert Chatter chatty.00d2w00000rpkcmeaj.nvo6r93vk9qk@chatter.salesforce.com ✓ Chatter Free User
Edit User, Integration integ integration@00d2w00000rpkcmeaj.com ✓ Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00d2w00000rpkcmeaj.com ✓ Analytics Cloud Security User
New User
Reset Password(s)
Add Multiple Users
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
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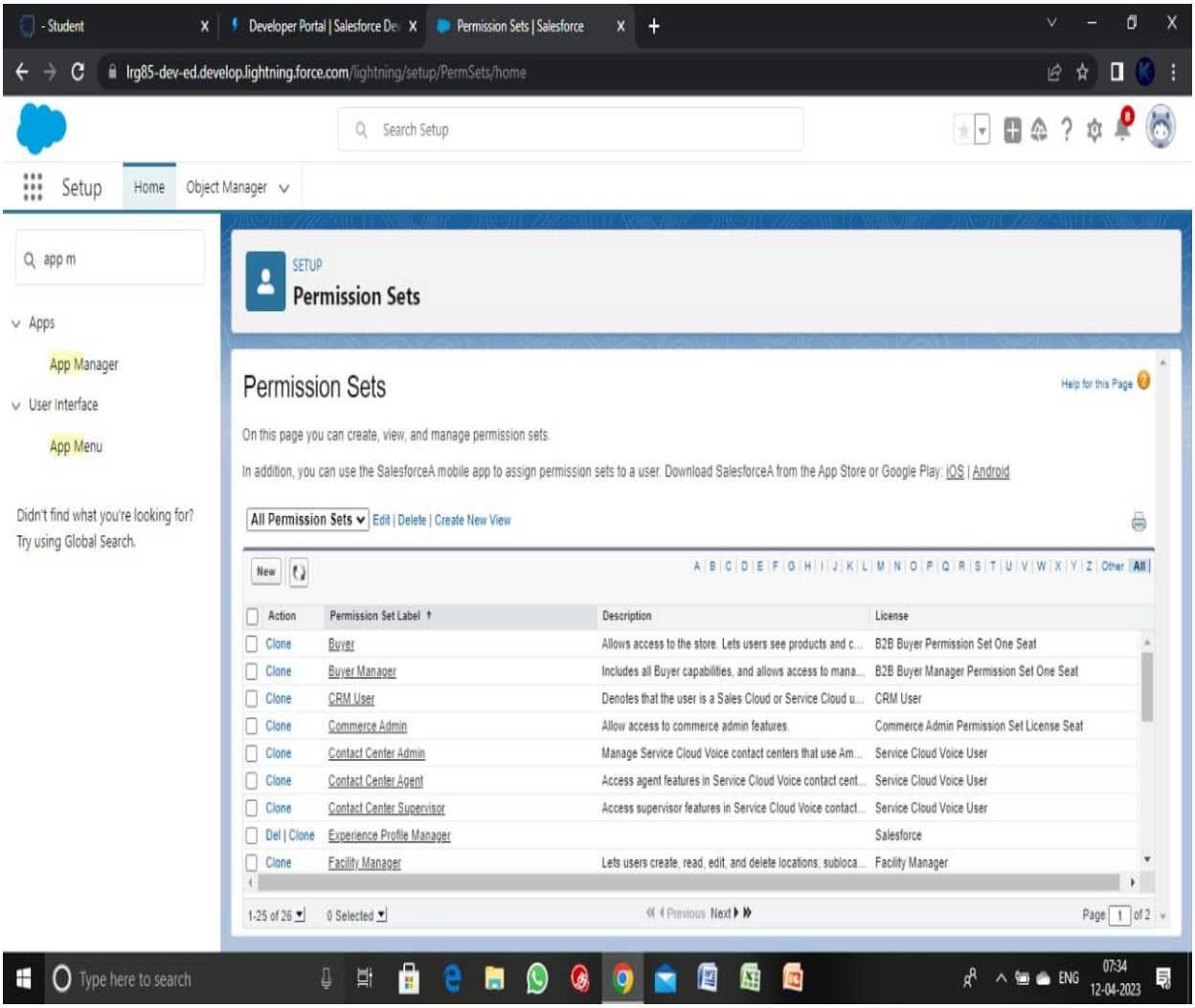
12-04-2023


- Student
Developer Portal | Salesforce De
Permission Sets | Salesforce
lrg85-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Search Setup
Setup
Home
Object Manager
app m
Apps
App Manager
User Interface
App Menu
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Sets
Help for this Page
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
New
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Permission Set Label
Description
License
Clone | Buyer | Allows access to the store. Lets users see products and c... | B2B Buyer Permission Set One Seat
Clone | Buyer Manager | Includes all Buyer capabilities, and allows access to mana... | B2B Buyer Manager Permission Set One Seat
Clone | CRM User | Denotes that the user is a Sales Cloud or Service Cloud u... | CRM User
Clone | Commerce Admin | Allow access to commerce admin features. | Commerce Admin Permission Set License Seat
Clone | Contact Center Admin | Manage Service Cloud Voice contact centers that use Am... | Service Cloud Voice User
Clone | Contact Center Agent | Access agent features in Service Cloud Voice contact cent... | Service Cloud Voice User
Clone | Contact Center Supervisor | Access supervisor features in Service Cloud Voice contact... | Service Cloud Voice User
Del | Clone | Experience Profile Manager | Salesforce
Clone | Facility Manager | Lets users create, read, edit, and delete locations, subloca... | Facility Manager
1-25 of 26
0 Selected
Previous Next
Page 1 of 2
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12-04-2023

4. Trailhead profile Public URL

Team leader _ https://trailblazer.me/id/kkumar2144

Team member 1 _ https://trailblazer.me/id/sboopathi7

Team member 2 _ https://trailblazer.me/id/mytha5

Team member 3 _ https://trailblazer.me/id/absri10

5. ADVANTAGES & DISADVANTAGES

5.1 ADVANTAGES

There are various advantages of using a CRM system for a business as it provides the best possible customer service by improving customer service, by improving customer retention, tracking customer data,streamlining operation, redusing costs, and taking the business to the next level. The CRM can engage the user with its customer across multiple channels like email, social media,live chat,and phone.

Valuable calculated data given an insight into need of customers, problems faced by them , correction required, and how you can serve then better. Collected data can be tracked and saved them better.

Modern CRM software has many functions, but the software was created to improve business-customer relationships, and that's still its main benefit. A CRM manages all of your contacts and gathers important customer information – like demographics, purchase records and previous messages across all channels – and makes it easily accessible to anyone in your company who needs it. This ensures that your employees have all they need to know about the customer at their fingertips and can provide a better customer experience, which tends to boost customer satisfaction.

DISADVANTAGES

A CRM software is not a small investment by any means. The price of the software itself can be quite high, and then you have to factor in the cost of integration, data migration, training, and support. Not every business can afford to make this kind of investment, and even if they can, there's no guarantee that the return on investment will be worth it.

A lot of CRM systems are not user-friendly and can be quite frustrating to use. This can lead to a lot of wasted time and energy trying to get the system to do what you want it to do. If a CRM is difficult to use, people are going to avoid using it, which defeats the whole purpose of having one in the first place.

A lot of CRM systems are very complex, and require a lot of training for users to be able to use them effectively. This complexity can lead to frustration and ultimately lead users to give up on the system entirely. If a CRM system is too complex, it's not going to be used to its full potential, which will defeat the whole purpose of implementing it in the first place.

A lot of CRM systems are not very customizable, which means that businesses may not be able to make them fit their specific needs and requirements. This can lead to a lot of frustration on the part of users who feel like they can't get the system to do what they want it to do.

6. APPLICATION

Today we announced that redancy has acquired Ascendify, adding value to our radancy talent acquisition cloud through advanced candidate relationship management capabilities.

Traditionally, talent technology has consisted of siloed solutions, often involving manual processes.With the redancy talent acquisition cloud, we offer a single, integrated, end-to-end platform that automates and optimizes the candidate recuirement process allowing our platform to deliver more effective amd cost-efficient outcomes.

As you switch to using a CRM software solution for schools, many benefits come along. Not only does it enhances 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:

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.

Better Student Engagement:

It enables schools to track interactions with students and their parents, and provides a platform for **personalised 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.

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.

7. CONCLUSION

Cutomer relationship management is a business strategy that enable a business organization to maximize revenue, customer satisfaction , profitability through strategic mobilization , organization and management of customer interest and desire.

The system has significantly contributed to the company financial, operational, managerial, and development initiatives with a robust customer relationship that has fostered great sale of its product. From the above analyses and comparison of CRM systems a series of conclusion can be drawn.

Customer Relationship Management entails all aspects of interaction a company has with its customer, whether it is sales or service related: it starts with the foundation of relationship marketing.

CRM is a systematic approach towards using information and ongoing dialogue to built long lasting mutually beneficial customer relationship. From the above all available data it is clear that how CRM is placing a vital role in service sector. So, it makes more strengthen this sector.

1. Findings of the survey revealed that 59% of the respondents do not use a CRM system, while 41% indicated using at least one system. When asked why a CRM system is not being used, 57% of the institutions indicated that the lack of knowledge about CRM systems is the main reason, followed by lack of budget, (43% of HEIs pointing out this reason) and 25% of the institutions indicated

both these reasons.

2. However, 36% out of 104 institutions that do not use a CRM system are considering purchasing

one.

3. CRM systems are most commonly used for recruitment and admissions with 57% of institutions using the CRM system(s) for both processes.

4. Microsoft Dynamics CRM is used by most HEIs that responded to the survey, with 19 respondents using this CRM, followed by Student Recruitment System with seven and Salesforce with five institutions using these systems, respectively.

5. Smaller institutions tend to use a proprietary CRM system more often than existing standard systems.

6. Most generic systems were not willing to provide an online demo, whereas most education specific system providers were very eager to collaborate and provide a demo.

7. It is impossible to recommend any system in particular, as every system in this report comes with unique functionalities that different institutions might find useful.

8. For institutions looking for CRM software that offers tools to manage every part of the student life cycle, from enquiry to alumni, the following systems may be a good fit:

- Campus Management (Campus Nexus CRM)
- Ellucian (Recruiter)

- Hobsons (Radius)
- Jenzabar (SEM CRM)
- Maximizer CRM (Student Relate)
- Proretention (Enrollment CRM)

8. FUTURE SCOPE

These days, numerous small and medium sized enterprises are arising across the world. Unlike large organization, they are reluctant to implement CRM software.However the preference and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment. Moreover, the companies didn't have the expertise to manage the CRM software inhouse. Hence, they were bound to hire designated technicians. These technicians used to charge a lump sum amount in exchange for their services. As a result, the cost used to be the most discouraging factor for small and medium enterprises. If we notice today's scenario, then the CRM software has become quite affordable. Even many developers are providing CRM software for free. Since most CRMs are web-based software, the up-gradation of infrastructure does not become necessary. Hence, it is a great way to save your expenses.

Integration of the CRM software with accounting software can be a big game-changer for small enterprises. Both the software will analyze past data of your business and generate sales forecasts automatically. Thus, you can easily have 42% better forecasts than that of non-CRM applications. Leads management refers to the process of managing the prospects of your company and classifying them into various categories. Moreover, you can use the social media platform for identifying the choices and preferences of your leads. Next, you can track and persuade them to purchase the products and services of your company. Therefore, leads management enables you to unfold the likes and dislikes of your customers.

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