A CRM APPLICAIONS FOR SCHOOLS/COLLEGES

Submitted By

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Project Report Template

1 INTRODUCTION

1.1 Overview

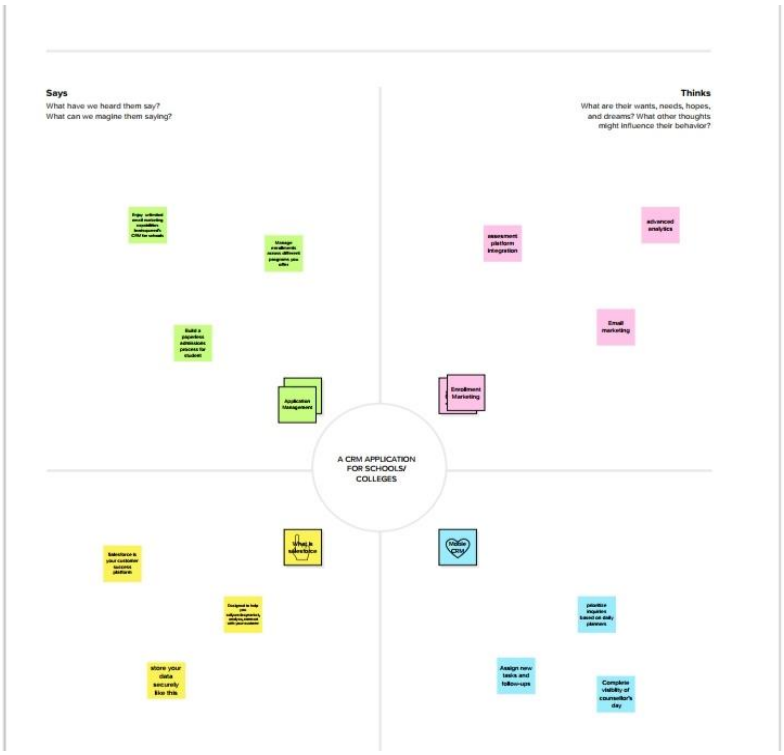
A CRM is a customer-centric system that can help education professionals nurture relationships with prospects and enrollees, produce data-driven insights to illustrate progress towards goals, and streamline their admissions and marketing initiatives to save time and effort.

1.2 Purpose

- *Improve Student Admissions Lifecycle. ...*
- *Track Student Life-Cycles Within the Institution. ...*
- *Keep Alumni Information Safe and Accessible. ...*
- *Stay Connected with Teams. ... ...*
- *Track and Gain Insight on Organization-Wide Data and Processes. ...*
- *Reduce Operational Costs*

2 Problem Definition &Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

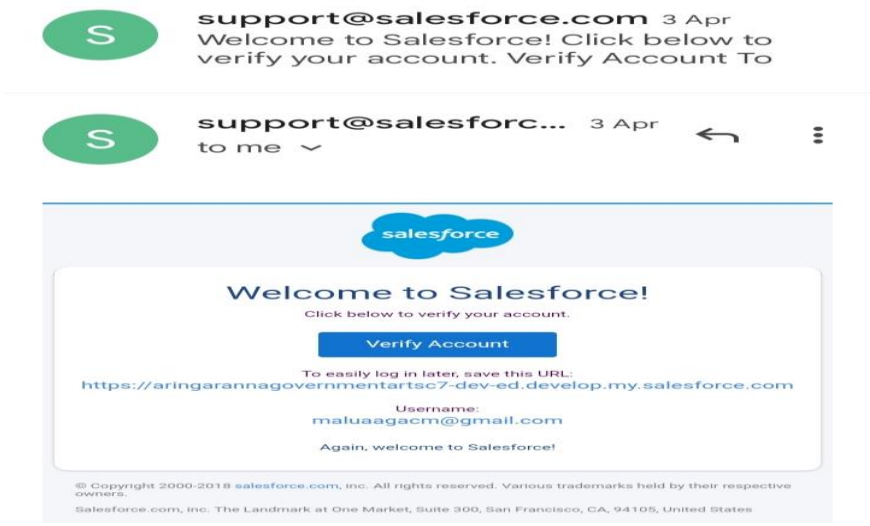
3 RESULT

3.1 Data Model:

<table>
<tr><th>Object name</th><th>Fields in the Object</th></tr>
<tr><td>obj1</td><td>
<table>
<tr><th>Field label</th><th>Data type</th></tr>
<tr><td>School</td><td>Text Area</td></tr>
<tr><td>Student</td><td>Picklist</td></tr>
</table>
</td></tr>
<tr><td>Obj2</td><td>
<table>
<tr><th>Field label</th><th>Data type</th></tr>
<tr><td>Parent</td><td>Text Area</td></tr>
<tr><td>Student</td><td>Master details relationship</td></tr>
</table>
</td></tr>
</table>

3.2 Activity & Screenshot

Milestone 1

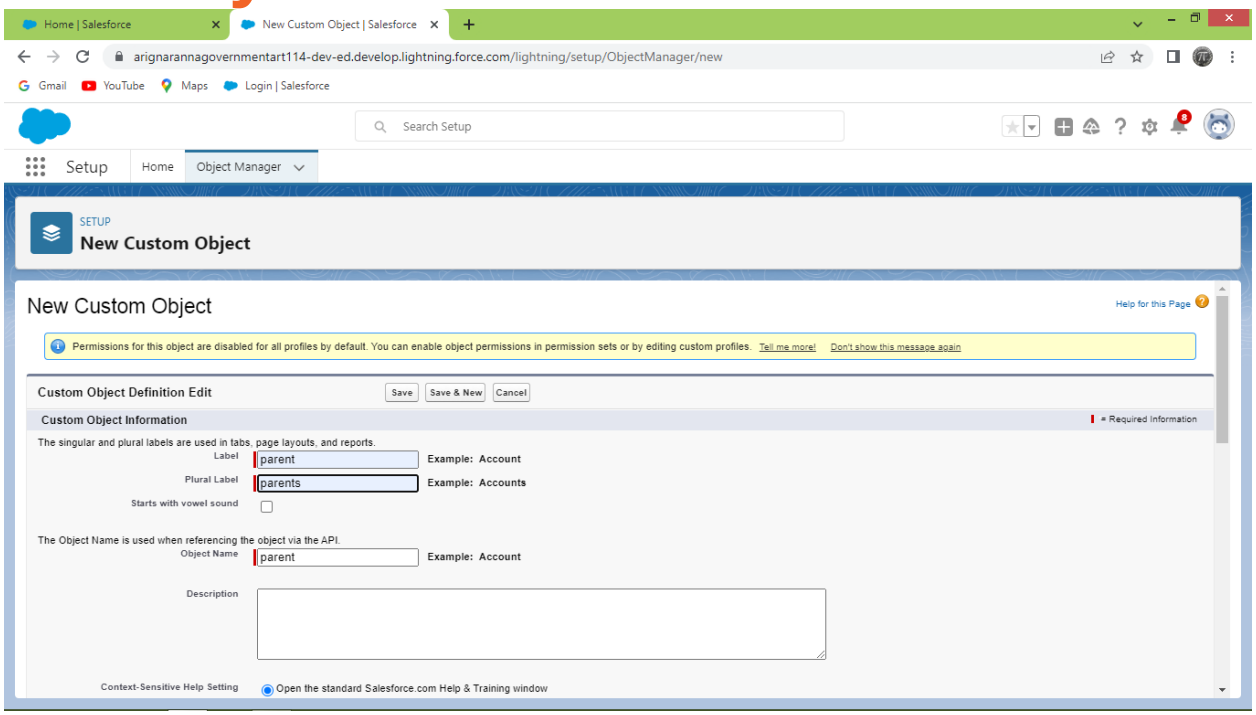


Milestone 2

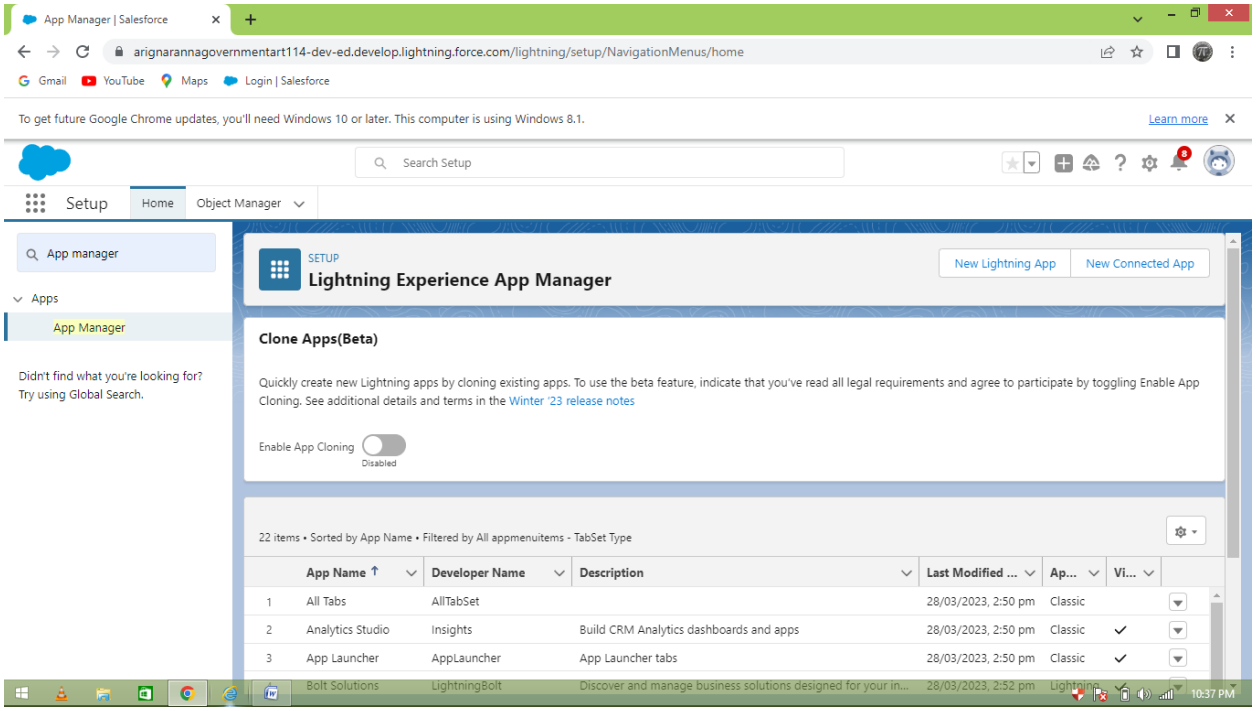
Activity 1

Activity 2

Activity 3

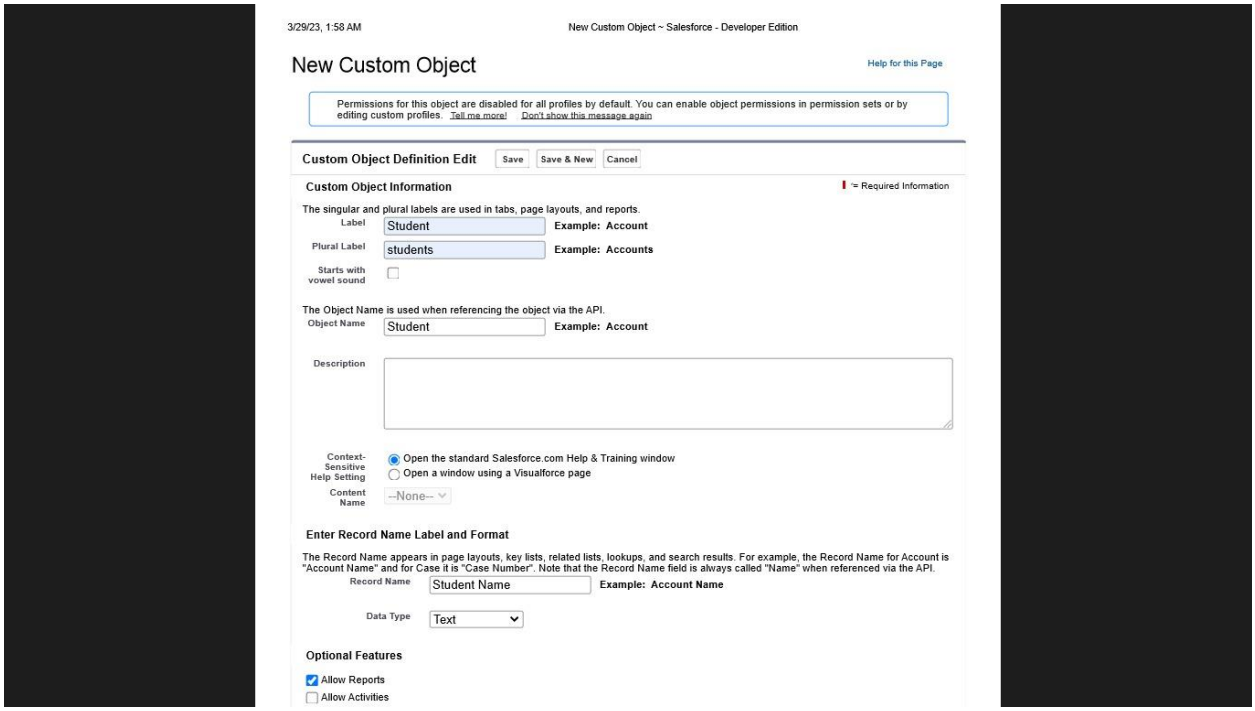


Milestone 3
Activity

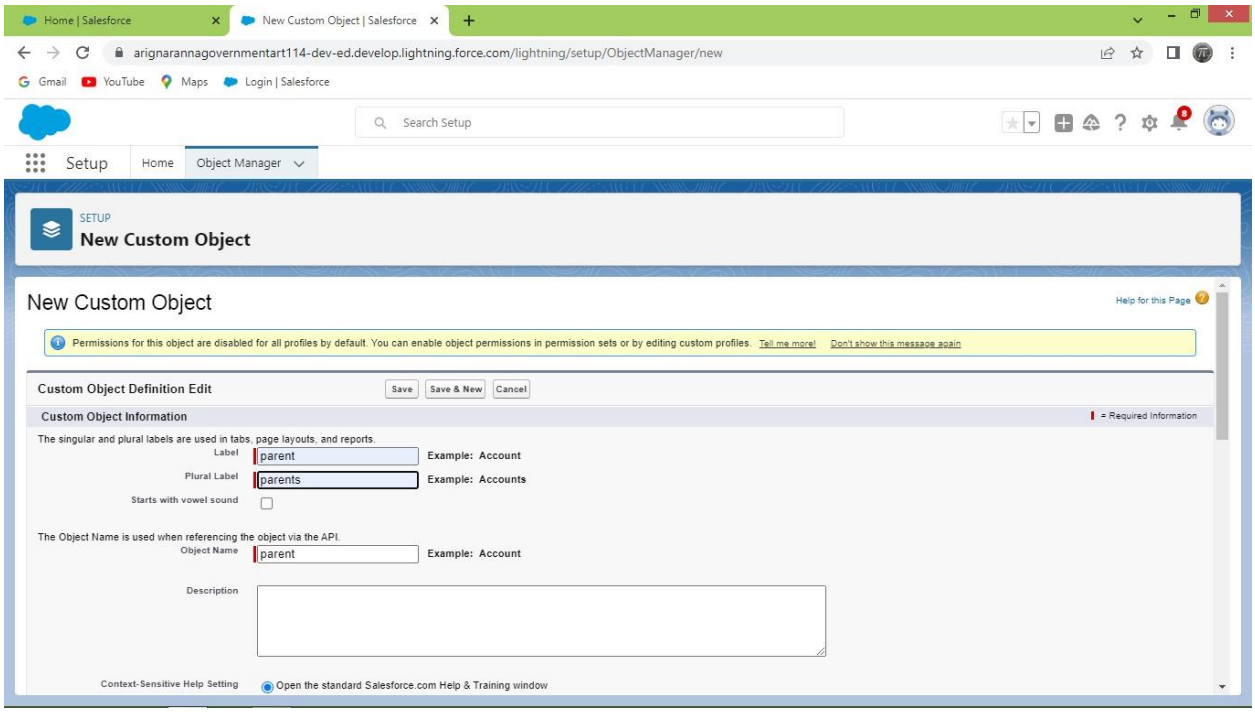


Milestone 4
Activity 1

Activity 2

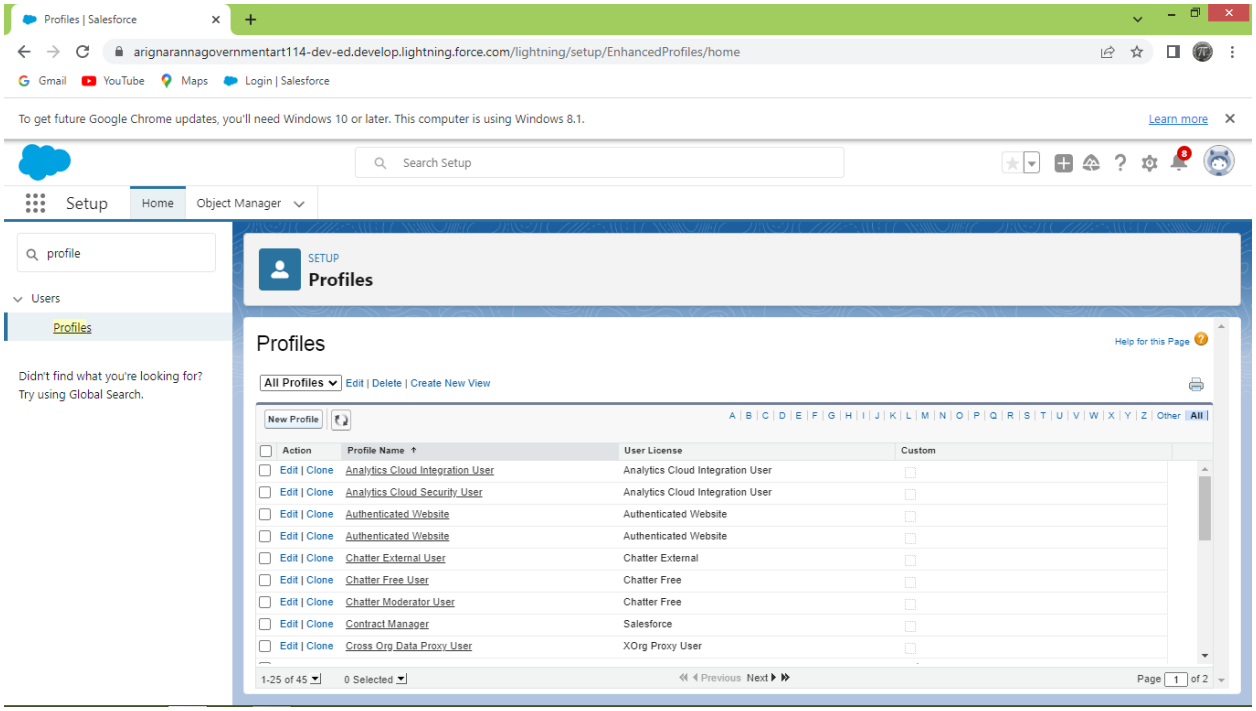


Activity 3



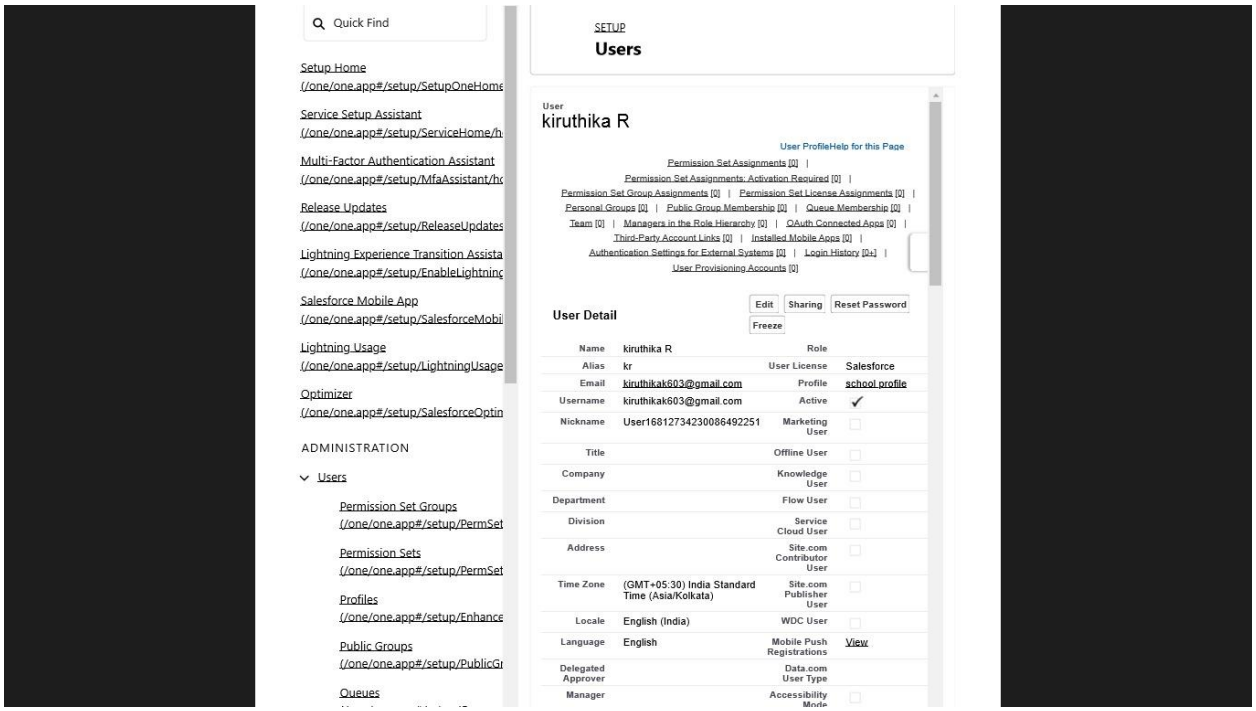
Milestone 5

Activity



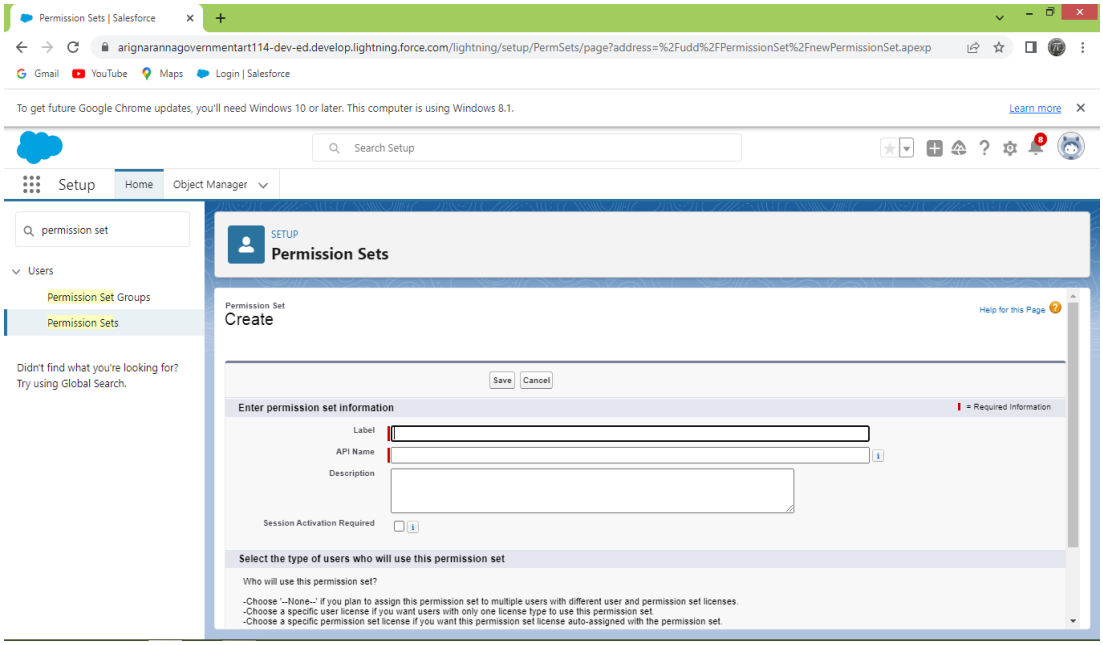
Milestone 6

Activity



Milestone 7

Activity 1

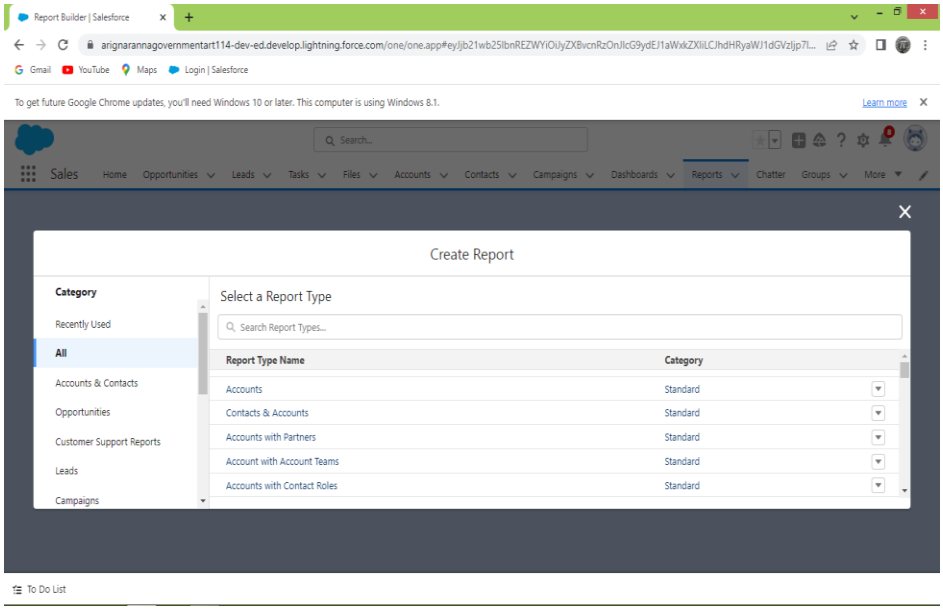

Permission Sets | Salesforce
arignarannagovernmentart114-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Gmail
YouTube
Maps
Login | Salesforce
To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 8.1.
Learn more
Search Setup
Setup
Home
Object Manager
permission set
Users
Permission Set Groups
Permission Sets
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
API Name
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Activity 2

4/11/23, 10:49 PM
Permission Sets | Salesforce
permission sets
Users
Permission Sets
Didn't find what you're looking for?
Try using Global Search.
... > SETUP > PERMISSION SET 'PRINCIPAL'
Principal
Current Assignments
Add Assignment
Full Name
Active
Role
Profile
User License
kiruthika R
school profile
Salesforce

Milestone 8

Activity



4 Trailhead Profile Public URL

Team Lead - https://trailblazer.me/id/kirur8

Team Member 1 – https://trailblazer.me/id/kowss11

Team Member 2 – https://trailblazer.me/id/loges20

Team Member 3 – https://trailblazer.me/id/mpoomalai

Project Report Template

5 ADVANTAGES & DISADVANTAGE

Advantages of CRM

It allows for more effective sales and marketing.

Having huge amounts of data on **customer interactions** enables an organisation to build up a clearer picture of its customers. It allows for deep insights to identify what the company is doing right as well as where it's weak when it comes to managing its customers.

It can speed up the sales conversion process.

A CRM system integrated within a marketing campaign allows insights into the interests of prospective customers. Once the client enters the sales funnel, qualification and conversion can be full or partly automated making it much faster.

It increases staff productivity, lowers time costs and boosts morale.

Quaint as it may seem, paperwork is still a significant part of many businesses' day-to-day operations. A lot of that paperwork could be eliminated with a CRM system.

Disadvantages of CRM

Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

If staff come to rely too heavily on **CRM software**, it reduces their flexibility in dealing with customer queries. They often

become helpless in the face of questions from clients where the information isn't on the system and which requires lateral thinking to solve the problem.

Security concerns associated with centralised data.

There are risks associated with keeping a lot of data in one place. With stringent regulations surrounding data (GDPR, for example), businesses face severe penalties in the event of security breaches. When it comes to CRM software, it is vital that security processes are put in place to protect clients' personal information. This can be a significant expense for a business, but the costs associated with not having such safeguards in place are far higher.

6 APPLICATIONS

7 CONCLUSION

You can focus on quality leads

If you've created a strong enrollment strategy by nurturing prospective leads with targeted events, email communications, a responsive website, and more, it's likely that you'll see an increase in admissions coming through your portal.

8 FUTURE SCOPE

Benefits of CRM for Higher Education

Institutions can benefit from CRM higher education technology in a variety of ways:

- A unified view of constituent information
- $2.4 million in total legacy cost savings
- An improved student experience
- Empowered faculty and staff
- The flexibility needed to pivot quickly

Let’s take a look at each one in detail