

GOVT ARTS COLLEGE , OOTY

DEPT OF MATHEMATICS

Mentor : Dr.N.Anusheela

Team Lead : Magadevi G

Team member 1: Gopika B

Team member 2:Keerthana J

Team member 3:Manimegala K

A CRM Application For Schools/Colleges

1.Introduction:

First let's we define what CRM is Customer Relationship Management. A school CRM is a CRM to built for preschools and k-12 education to streamline the admission process , manage student profiles and relationships with parents through timely communication.

1.1Overview:

CRM higher education plays a crucial role of in managing all your student enquiries and takes students through a smooth and streamlined admission process.

CRM its a tool that's primarily used in B2B sales. But as schools continue to impliment new technologies, its a system that's build, manage and nurture relationships with protective families .In this post,we'll take a look at how CRM , work and why your school needs one!

Today many higher education instutions are managing the student journey with outdated and siloed systems. Increasingly, students are expecting seamless technology experiences, personalized communications, a clear ROI.

CRM, however, is an integrated platform connecting insights across recruitment and admissions ,student experience , advancement and marketing into a single pane of glass. This enables institutions to collaborate more effectively and support more students at scale.

1.2Purpose:

A CRM is a system that helps schools manage the entire lifecycle of a potential customer- sometimes also refered 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. Some of the benefits of a school

CRM are internal, offering efficiencies for your school's register or admissions team .First your school will benefit from having all key prospective parent data in a single system.

One of the biggest challenges to Building long term relationship with customers is to aggregate the right data and Build a holistic view of the customer. Our project can be achieved by Unified view of constituent information .An improved student experiences. The flexibility needed to pivot quickly.

Project Team:

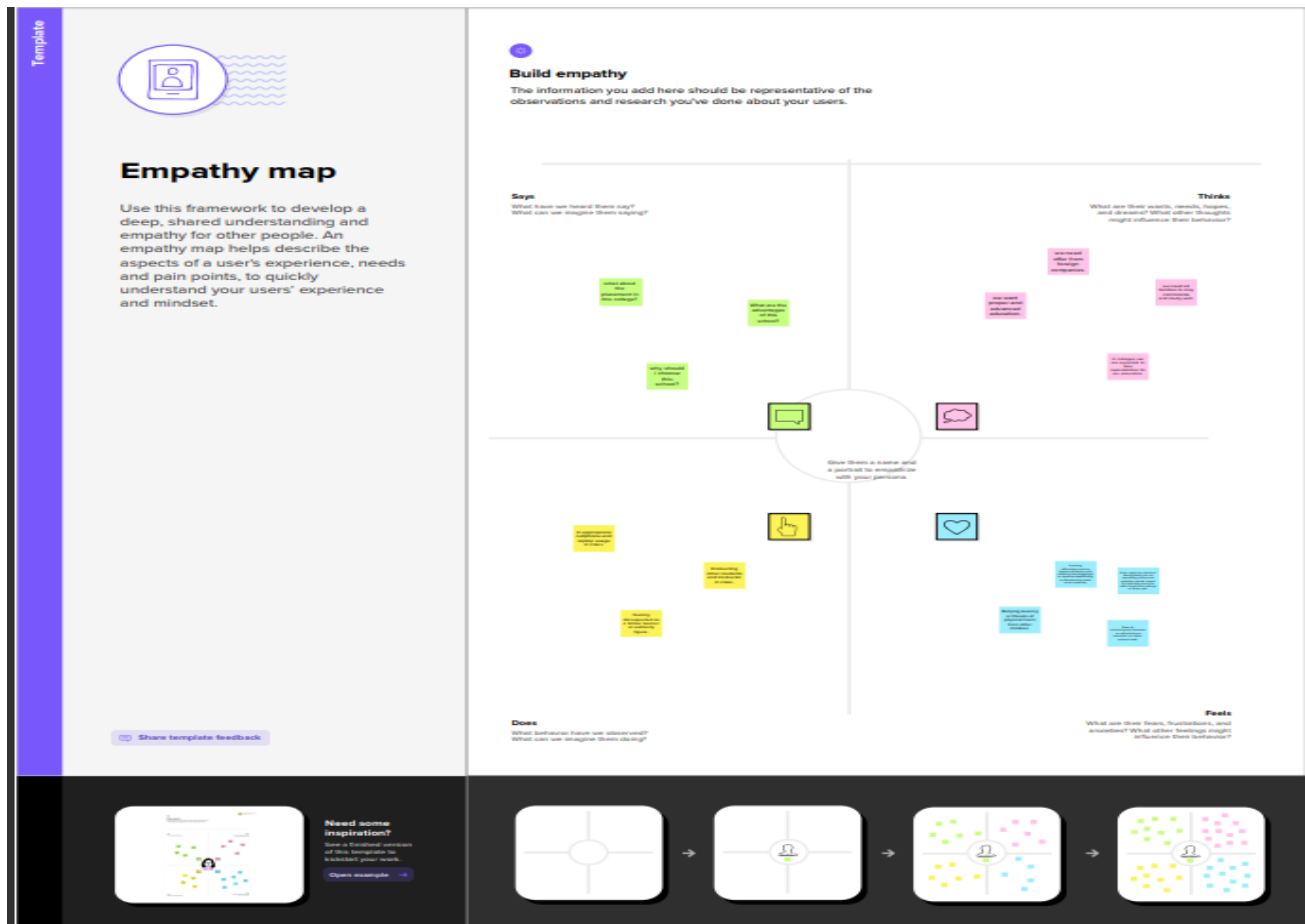
Team lead:Magadevi g

Team member: Gopika B

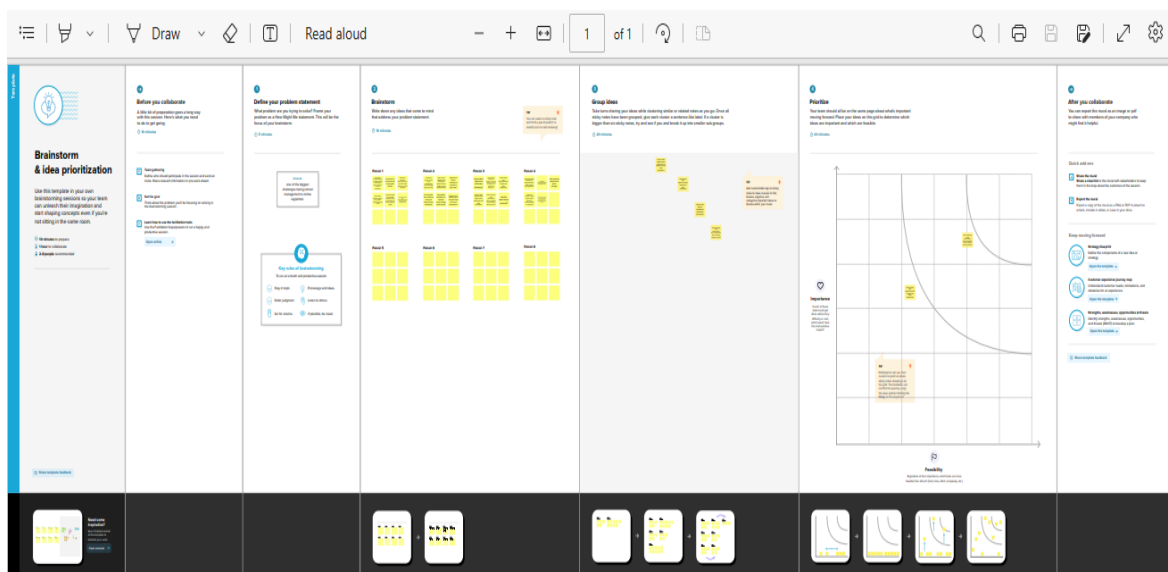
Team member: Manimegala K

2.Problem Definition & Design Thinking

2.1 Empathy map



2.2 Ideation & Brainstorming Map



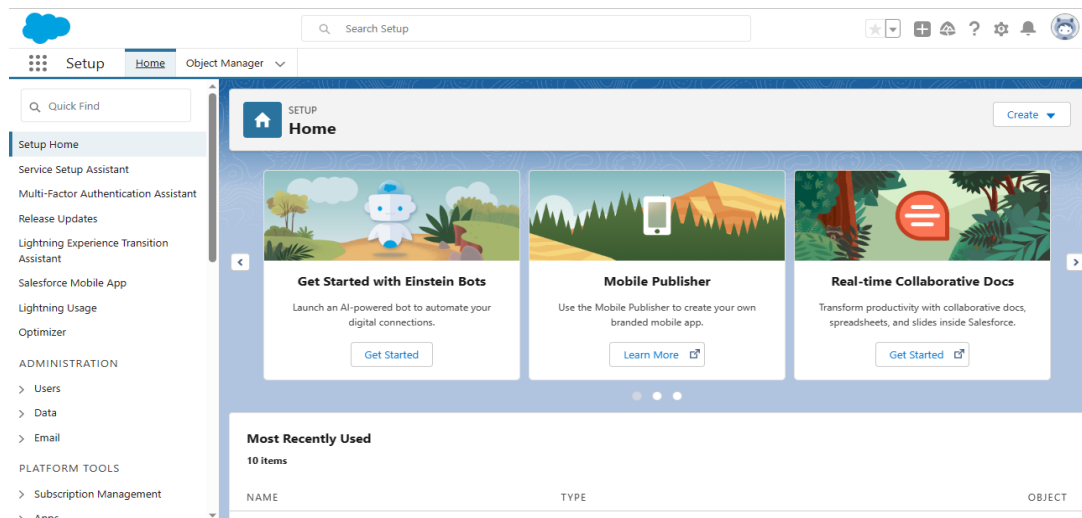
3.RESULT:

3.1 Data Model:

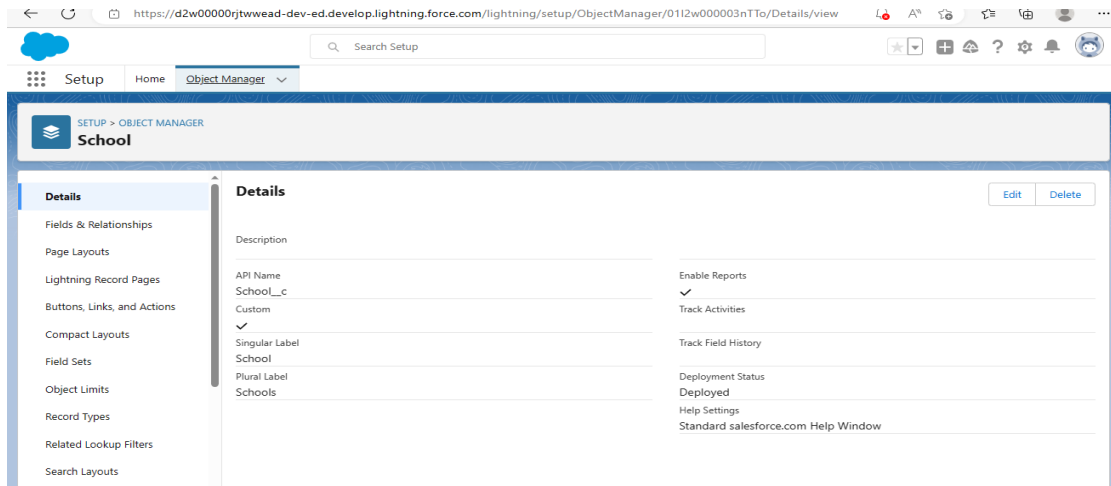
Object Name	Fields in the Object	
Obj 1	Field Label	Data Type
	Address	Text Area
	Phone Number	Phone
	Number of Students	Roll up Summary
Obj 2	Field Label	
	Phone Number	Phone
	School	Master- Detail Relationship
	Results	Picklist
	Class	Number
Obj 3	Field Label	Data type
	Parent Address	Text Area

3.2 Activity & Screenshot:

Milestone 1:



Milestone 2:



Creation of School Object:

Creation of objects for school management

For this school management we need to create 3 objects i.e. school, parents, and students.

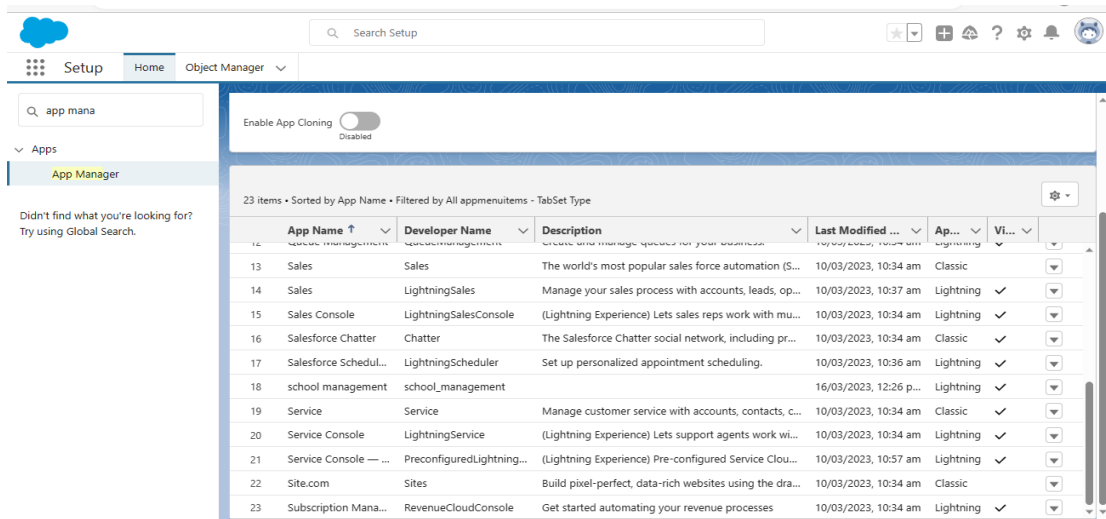
Create student object:

Create a custom tab. Click the home tab, enter tabs in quick find and select tabs. Click new select student.

Create parent object:

Create a custom tab. Click the home tab, enter tabs in quick find and select tabs. Under custom object tabs. Click new. Select parents.

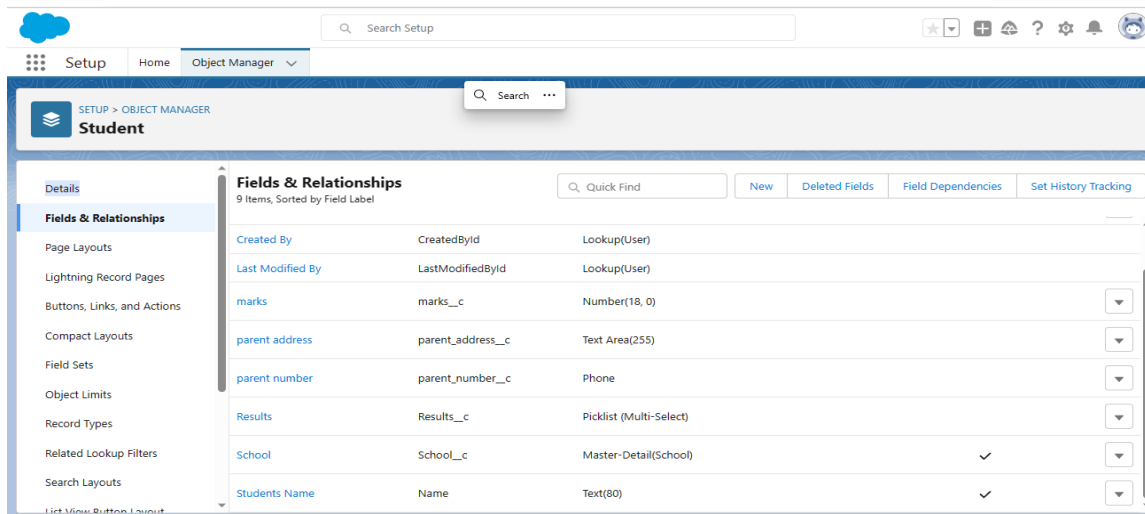
Milestone 3 : Lightning App



Create the school management app

From setup enter App manager in the Quick find and select App manager.

Milestone 4 : Fields and Relationship



Creation of fields for school objects

Select the master object summarized as Students and then select max as Roll up and then select marks as fields to aggregate.

Creation of fields for the student objects

Create a master details relationships with school object. Select master detail relationship as the data type.

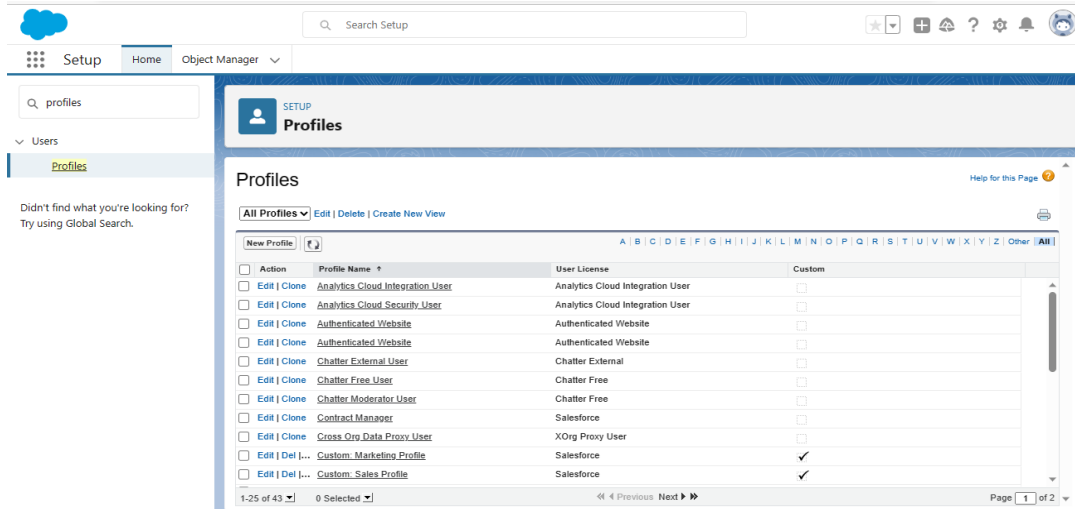
Create a picklist field . Select picklist as the data type.

Create a number field .Select the number as data type.

Creation of fields for parent object

Select the text area as the data type enter parent address.

Milestone 5 : Profile

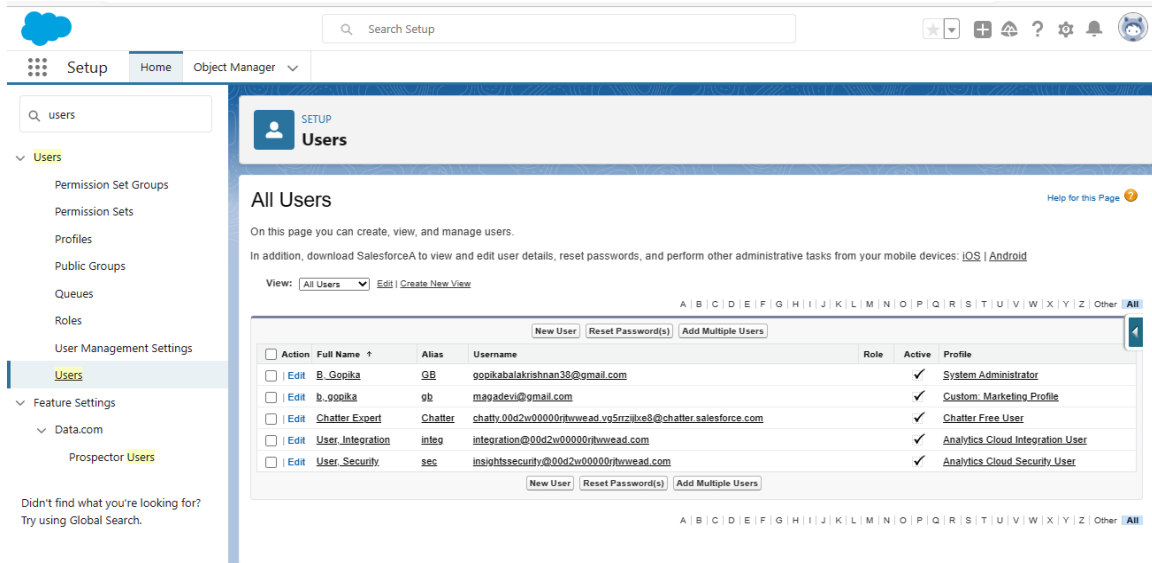


The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'profiles' and a list of navigation items including 'Users' and 'Profiles'. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists various profiles such as 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', and 'Custom Sales Profile'. The 'Custom' column has checkboxes, with 'Custom Marketing Profile' and 'Custom Sales Profile' checked. The bottom of the table shows '1-25 of 43' items, '0 Selected', and navigation links for 'Previous' and 'Next'.

Creation on profile

From setup enter profiles in the quick find bx and select profiles.

Milestone 6: Users

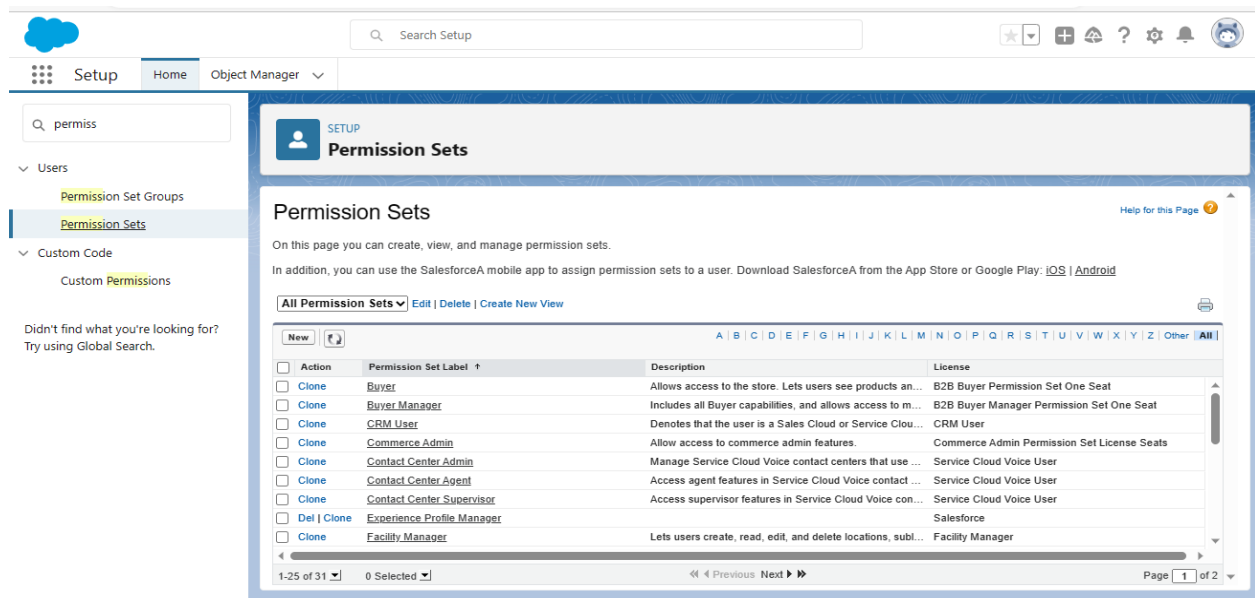


The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains a search bar with 'users' and a list of navigation items including 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'B. Gopika', 'b. gopika', 'Chatter Export', 'User Integration', and 'User Security'. The 'Active' column has checkboxes, with all listed users being active. The 'Profile' column shows the assigned profile for each user, such as 'System Administrator', 'Custom Marketing Profile', 'Chatter Free User', 'Analytics Cloud Integration User', and 'Analytics Cloud Security User'. The bottom of the table shows 'New User', 'Reset Password(s)', and 'Add Multiple Users' buttons.

Creating on Users

From setup in the quick find box,enter users and the select users.

Milestone 7: Permission Sets

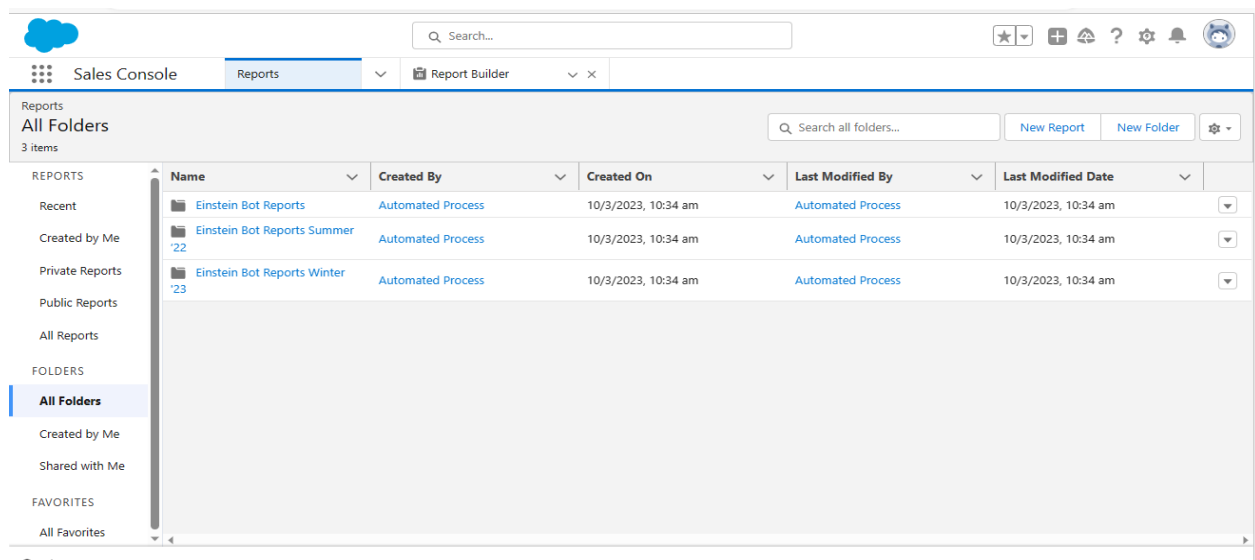


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with "permission" entered and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a search bar, a "New" button, and a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. The table lists several permission sets, including Buyer, Buyer Manager, CRM User, Commerce Admin, Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Experience Profile Manager, and Facility Manager. The bottom of the table shows "1-25 of 31" items and "0 Selected".

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products an...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to m...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Clou...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use ...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact ...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice con...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager		Salesforce
<input type="checkbox"/>	Facility Manager	Lets users create, read, edit, and delete locations, subli...	Facility Manager

From setup ,enter permission sets in the quick find box ,then select permission sets.

Milestone 8: Reports



The screenshot shows the Salesforce Reports page. The left sidebar contains a search bar and a list of navigation items: Reports, Folders, All Folders (highlighted), Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area is titled "Reports" and includes a search bar, a "New Report" button, and a table of report folders. The table has columns for Name, Created By, Created On, Last Modified By, and Last Modified Date. The table lists three report folders: Einstein Bot Reports, Einstein Bot Reports Summer '22, and Einstein Bot Reports Winter '23. The bottom of the table shows "1-25 of 31" items and "0 Selected".

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	10/3/2023, 10:34 am	Automated Process	10/3/2023, 10:34 am
Einstein Bot Reports Summer '22	Automated Process	10/3/2023, 10:34 am	Automated Process	10/3/2023, 10:34 am
Einstein Bot Reports Winter '23	Automated Process	10/3/2023, 10:34 am	Automated Process	10/3/2023, 10:34 am

From the reports tab, click new report. Select the report type as school with students and parents for the reports.

4.Trailhead Profiles Public URL

Team lead: <https://trailblazer.me/id/maswini10>

Team member 1- <https://trailblazer.me/id/gopib16>

Team member 2- <https://trailblazer.me/id/kkeerthana42>

Team member 3- <https://trailblazer.me/id/mkathir19>

5.Advantages of the CRM application for schools/colleges

Thanks to the use of CRM, the conversion can increase up to four times. According to IBM, every dollar invested in CRM implementation brings the company five dollars in profit. This alone clearly demonstrates the importance of using this system. Below we will share the main benefits of CRM for higher education.

1. Reduction In The Cost Of Expenses

One of the main benefits of using CRM in education is that automation and standardized online learning processes reduce costs by eliminating a lot of routine and manual steps. But if during the implementation of CRM the number of routine operations in the company's business processes does not decrease, then the implementation plan requires revision.

2. Improving The Quality Of Service / Product

With a CRM approach, the company prioritizes customer relationships, which allows for more feedback. And thanks to this feedback, you can seriously increase the quality of your services or your product.

3. Improving The Organization Management Process

The use of automation tools helps in the control and management of employees. With the help of CRM for university technologies, you can get data on the effectiveness of each of your teachers and students.

4. Increased Customer Loyalty

All necessary information about the customer is collected and stored in a database that is available to all employees of the sales department. Thus, it is much easier to meet the client's needs without getting on the client's precious nerves while communicating with the sellers.

5. Track And Increase The Number Of Potential Clients

Having received loyal customers, you can be sure that they will bring their friends or partners to you. This method of attracting customers is much better than others in terms of price / quality ratio.

6. History Of Work With Each Student.

This is another benefit of CRM in the education industry. We are accustomed to the fact that our desires are foreseen, and post-sales support is available at any time of the day. Implementing such processes is impossible without a CRM platform, because it has a separate card for each client with full information about the student. This data is presented in chronology, and you can view the entire history of work with the client in a couple of minutes.

Disadvantages of CRM application for School/Colleges

1. Difficult implementation process Whichever CRM you choose, you 'could' face a [complex and challenging implementation process](#). At MO Agency we've completed over 150 successful CRM implementations, and it takes time and effort to get them right! **Every CRM is a complex system** that needs to be integrated properly if you want to make the most of them.

2. Costs of CRMs

It goes without saying that if you want a top-quality CRM you need to invest some money. But, the problem is that **CRMs can be incredibly expensive, especially when you look at the top CRMs such as Salesforce and Pipedrive.**

3. Training your staff

CRM systems can be hugely beneficial to any business, but **the downside of these systems is that they can be difficult to learn and use consistently.** Your team members will need to learn how to use the system, and your management needs to fully understand how the system works so they can provide guidance wherever necessary.

4. Complexity of the system

One of the biggest concerns that business owners have is that the system is too complex for their team. **Some CRMs fall into this category very often. Salesforce CRM is often over spec'ed and can fall in here. Large Salesforce implementations can often require an entire team to look after the CRM.** This adds major costs and additional staff members to your team that you didn't account for initially.

5. Data security concerns

CRMs provide businesses with one unified system. This means that **your business data is shared across team members in the organisation.** Whether it's finances, contact details, projects, or marketing analytics, you need to be comfortable sharing these details with some of your teams.

6.Applications

A Project CRM application for School/Colleges with a plethora of **CRM** tools populating the industry, it gets difficult to choose the one that really suits your business. Each CRM on the market is unique and has its own suite of features and automations.

Create a custom object for school application: By embedding a **custom School Application** Form on your university's website, you'll avoid scanning mounds of paperwork, save time considering **applications**.

Customize the page layouts for the crm school application object: This will allow you to easily view and update students information

Set up automation rules: Automating school applications can be done using different tools, depending on the specific needs and requirements. Identify the tasks that need to be automated: List down the tasks involved in the school application process, such as collecting and processing application forms, sending confirmation emails, scheduling interviews, and notifying applicants of their acceptance or rejection.

Create a reports and dashboards: To create a report and dashboards for school applications, we need to first define the objectives of the report and the intended audience. In this case, the report and dashboards are intended for school administrators and teachers, and the objective is to provide them with data-driven insights into the performance of their students and the effectiveness of their teaching methods.

Integrate with other systems: Student Information System (SIS) Integration: Integrating your school application with your SIS can help with data consistency, reduce data entry errors, and save time. This integration can also help with managing student data, including attendance, grades, and transcripts.

7.CONCLUSION:

customer relationship management (CRM) applications can be very beneficial for educational institutions as they help in managing and organizing various aspects such as student data, course information, schedules, communication with parents and teachers, and more.

Implementing CRM applications in schools or colleges can streamline the administrative tasks, improve communication between staff and students, enhance the overall learning experience, and provide insights to improve student outcomes. By having a centralized system, educational institutions can save time and resources while improving their operational efficiency.

In conclusion, the use of CRM applications in schools and colleges can have a positive impact on the educational environment, creating a more organized, efficient, and effective learning environment for both students and staff.

8.FUTURE SCOPE:

CRM (Customer Relationship Management) applications can be very beneficial for schools and colleges in managing their interactions with students, parents, and other stakeholders. Here are some potential future scopes of CRM applications for schools and colleges:

1. **Personalized communication:** CRM applications can help schools and colleges personalize their communication with students and parents. By tracking individual interactions, a CRM system can suggest personalized messages and recommendations for each student, based on their interests, strengths, and needs.

2. Streamlined admissions: A CRM application can simplify the admissions process by tracking student applications, sending reminders for missing documents, and providing automated status updates. This can save time for admissions staff and reduce errors in the process.
3. Student success tracking: By tracking student progress and performance, a CRM application can help schools and colleges identify students who are at risk of falling behind or dropping out. The system can alert teachers and counselors to provide extra support and interventions, such as tutoring or counseling.
4. Alumni relations: A CRM application can help schools and colleges maintain relationships with their alumni, tracking their achievements and providing opportunities for continued engagement. This can lead to increased donations, volunteerism, and support for the institution.
5. Data analytics: By collecting and analyzing data from various sources, a CRM system can help schools and colleges make data-driven decisions about enrollment, student success, and resource allocation. This can lead to more efficient operations and improved outcomes for students.

Overall, a CRM application can help schools and colleges better manage their relationships.