

Salesforce



Smart Internz

Associate Curriculum

Salesforce Ecosystem

Salesforce: Quick Look

Trailhead and Trailblazer
Community

Trailhead Playground
Management

Salesforce help

Salesforce Customer 360

Salesforce Platform Basics

Explore the Complete
Customer 360

Salesforce for Nonprofits
Basics

what does salesforce do?

Nonprofit Success Pack

Health and Optimization

The Benefits of Declarative
Programming vs. Imperative
Programming

Discover Your Ideal Career in
the Cloud

Salesforce Trust Site

Trailhead: Quick Look

What is CRM introduction?

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

Navigation

Accounts & Contacts for
Lightning Experience

AppExchange Basics

Scrum and Kanban at
Salesforce

Search Solution Basics

Salesforce CRM

Lightning Experience
Customization

Company-Wide Org Settings

User Management

List Views: Quick Look

Setup: Quick Look

Organize Your Data

Lightning App Builder

Personalize Your Salesforce
Experience

Data Model

Data Modeling

**Leads & Opportunities for
Lightning Experience**

**Lightning Experience
Productivity**

Formulas and Validations

Data Security

**Protect Your Data in
Salesforce**

Permission Set Groups

**Lightning Knowledge Setup
and Customization**

Picklist Administration

Customize a Salesforce Object

Custom Fields: Quick Look

What
Application
s is CRM?

What is
CRM
System for
Schools?

How is
CRM Used
in
University?

track all
communicatio
n and nature
relationship

Tool build
for
preschools
and k-12
education

Institution to
manage
relationships

Says

Think

databases
and apps
that many
business

Manage
student
profiles and
relationship
s

all cus connect
insights from
the
interactions

admission
process

this system
that helps
business
owners

All of their
customers
connect

Does

Feel

Customer Relationship Management (CRM) software is a type of technology that helps businesses manage their interactions and relationships with customers. It can be used to track customer information, sales, marketing, and customer service interactions, as well as to analyze customer data and predict future behavior.

CRM software is typically used by sales, marketing, and customer service teams to manage customer interactions and data in one central location. This can include information such as contact information, purchase history, and communication history. The software can also be used to automate certain tasks, such as sending follow-up emails or making personalized product recommendations.

One of the main benefits of CRM software is that it allows businesses to have a better understanding of their customers. By collecting and analyzing customer data, businesses can gain insights into customer behavior,

One of the main benefits of CRM software is that it allows businesses to have a better understanding of their customers. By collecting and analyzing customer data, businesses can gain insights into customer behavior, preferences, and needs. This information can then be used to create more targeted marketing campaigns and improve the overall customer experience.

Another benefit of CRM software is that it can help businesses improve their sales processes. By tracking customer interactions, businesses can identify potential sales opportunities and better understand the needs of their customers. This can lead to more effective sales strategies and ultimately result in more closed deals.

CRM software can also be used to improve customer service. By collecting customer data and communication history, businesses can quickly and easily access customer information, which can help them provide more personalized and efficient customer service. Additionally, some CRM software also includes features such as customer service portals, which allow customers to access information and resolve issues on their own.

There are many different types of CRM software available on the market, each with its own set of features and functionalities. Some popular types of CRM software include:

Operational CRM: This type of CRM software is focused on automating and optimizing sales, marketing, and customer service processes. It can be used to track customer interactions, manage leads and opportunities, and analyze customer data.

Analytical CRM: This type of CRM software is focused on analyzing customer data in order to gain insights into customer behavior and preferences. It can be used to create more targeted marketing campaigns and improve the overall customer experience.

Collaborative CRM: This type of CRM software is focused on fostering collaboration and communication among teams. It can be used to share customer data and information, as well as to manage workflow and projects.

What is a CRM system for schools?

What is a school CRM? A school CRM is a CRM (Customer Relationship Management) tool built for preschools and K-12 education to streamline the admission process, manage student profiles and relationships with parents through timely communication.



15 Best Higher Education CRM 2023

- Easy to implement CRM tool that helps focus on activities that close deals.
- monday sales CRM. Fully-customizable no-code CRM that centralizes your entire sales cycle.
- HubSpot. Free CRM solution at the core of HubSpot's business management suite.
- ClickUp.



What application is CRM?



CRM stands for “Customer Relationship Management” and is a software system that helps business owners easily track all communications and nurture relationships with their leads and clients. A CRM replaces the multitude of spreadsheets, databases and apps that many businesses patch together to track client data.

The Best CRM for Higher Education

Complete admissions platform for student acquisition, application tracking, student journey tracking, enrollment, and more.

Enrollment Lead Management

Equip your teams with the complete admissions platform for student acquisition, application tracking, student journey tracking, enrollment, and more.

- Inquiry capture
- Lead nurturing
- Applicant tracking and management
- Lead scoring based on predefined parameters
- Advanced Reporting
- Publisher platform integrations



Secure

Student Portal

David Bruce
Age 18

Course
Journaleers 1st Year

Student ID
917909

Campus Name
Osho Man/E89

Email
davidp@edu.com

Phone
9573670021

My Uploaded Documents

Documents

My Applications

Subjects

Upload Documents?

Upload

Chat with Counsellor

1st Year

2nd Year

3rd Year

4th Year

5th Year

6th Year

7th Year

8th Year

9th Year

10th Year

11th Year

12th Year

13th Year

14th Year

15th Year

16th Year

17th Year

18th Year

19th Year

20th Year

21st Year

22nd Year

23rd Year

24th Year

25th Year

26th Year

27th Year

28th Year

29th Year

30th Year

31st Year

32nd Year

33rd Year

34th Year

35th Year

36th Year

37th Year

38th Year

39th Year

40th Year

41st Year

42nd Year

43rd Year

44th Year

45th Year

46th Year

47th Year

48th Year

49th Year

50th Year

51st Year

52nd Year

53rd Year

54th Year

55th Year

56th Year

57th Year

58th Year

59th Year

60th Year

61st Year

62nd Year

63rd Year

64th Year

65th Year

66th Year

67th Year

68th Year

69th Year

70th Year

71st Year

72nd Year

73rd Year

74th Year

75th Year

76th Year

77th Year

78th Year

79th Year

80th Year

81st Year

82nd Year

83rd Year

84th Year

85th Year

86th Year

87th Year

88th Year

89th Year

90th Year

91st Year

92nd Year

93rd Year

94th Year

95th Year

96th Year

97th Year

98th Year

99th Year

100th Year

101st Year

102nd Year

103rd Year

104th Year

105th Year

106th Year

107th Year

108th Year

109th Year

110th Year

111th Year

112th Year

113th Year

114th Year

115th Year

116th Year

117th Year

118th Year

119th Year

120th Year

121st Year

122nd Year

123rd Year

124th Year

125th Year

126th Year

127th Year

128th Year

129th Year

130th Year

131st Year

132nd Year

133rd Year

134th Year

135th Year

136th Year

137th Year

138th Year

139th Year

140th Year

141st Year

142nd Year

143rd Year

144th Year

145th Year

146th Year

147th Year

148th Year

149th Year

150th Year

151st Year

152nd Year

153rd Year

154th Year

155th Year

156th Year

157th Year

158th Year

159th Year

160th Year

161st Year

162nd Year

163rd Year

164th Year

165th Year

166th Year

167th Year

168th Year

169th Year

170th Year

171st Year

172nd Year

173rd Year

174th Year

175th Year

176th Year

177th Year

178th Year

179th Year

180th Year

181st Year

182nd Year

183rd Year

184th Year

185th Year

186th Year

187th Year

188th Year

189th Year

190th Year

191st Year

192nd Year

193rd Year

194th Year

195th Year

196th Year

197th Year

198th Year

199th Year

200th Year

201st Year

202nd Year

203rd Year

204th Year

205th Year

206th Year

207th Year

208th Year

209th Year

210th Year

211st Year

212nd Year

213th Year

214th Year

215th Year

216th Year

217th Year

218th Year

219th Year

220th Year

221st Year

222nd Year

223rd Year

224th Year

225th Year

226th Year

227th Year

228th Year

229th Year

230th Year

231st Year

232nd Year

233rd Year

234th Year

235th Year

236th Year

237th Year

238th Year

239th Year

240th Year

241st Year

242nd Year

243rd Year

244th Year

245th Year

246th Year

247th Year

248th Year

249th Year

250th Year

251st Year

252nd Year

253rd Year

254th Year

255th Year

256th Year

257th Year

258th Year

259th Year

260th Year

261st Year

262nd Year

263rd Year

264th Year

265th Year

266th Year

267th Year

268th Year

269th Year

270th Year

271st Year

272nd Year

273rd Year

274th Year

275th Year

276th Year

277th Year

278th Year

279th Year

280th Year

281st Year

282nd Year

283rd Year

284th Year

285th Year

286th Year

287th Year

288th Year

289th Year

290th Year

291st Year

292nd Year

293rd Year

294th Year

295th Year

296th Year

297th Year

298th Year

299th Year

300th Year

301st Year

302nd Year

303rd Year

304th Year

305th Year

306th Year

307th Year

308th Year

309th Year

310th Year

311st Year

312nd Year

313th Year

314th Year

315th Year

316th Year

317th Year

318th Year

319th Year

320th Year

321st Year

322nd Year

323rd Year

324th Year

325th Year

326th Year

327th Year

328th Year

329th Year

330th Year

331st Year

332nd Year

333rd Year

334th Year

335th Year

336th Year

337th Year

338th Year

339th Year

340th Year

341st Year

342nd Year

343rd Year

344th Year

345th Year

346th Year

347th Year

348th Year

349th Year

350th Year

351st Year

352nd Year

353rd Year

354th Year

355th Year

356th Year

357th Year

358th Year

359th Year

360th Year

361st Year

362nd Year

363rd Year

364th Year

365th Year

366th Year

367th Year

368th Year

369th Year

370th Year

371st Year

372nd Year

373rd Year

374th Year

375th Year

376th Year

377th Year

378th Year

379th Year

380th Year

381st Year

382nd Year

383rd Year

384th Year

385th Year

386th Year

387th Year

388th Year

389th Year

390th Year

391st Year

392nd Year

393rd Year

394th Year

395th Year

396th Year

397th Year

398th Year

399th Year

400th Year

401st Year

402nd Year

403rd Year

404th Year

405th Year

406th Year

407th Year

408th Year

409th Year

410th Year

411st Year

412nd Year

413th Year

414th Year

415th Year

416th Year

417th Year

418th Year

419th Year

420th Year

421st Year

422nd Year

423rd Year

424th Year

425th Year

426th Year

427th Year

428th Year

429th Year

430th Year

431st Year

432nd Year

433rd Year

434th Year

435th Year

436th Year

437th Year

438th Year

439th Year

440th Year

441st Year

442nd Year

443rd Year

444th Year

445th Year

446th Year

447th Year

448th Year

449th Year

450th Year

451st Year

452nd Year

453rd Year

454th Year

455th Year

456th Year

457th Year

458th Year

459th Year

460th Year

461st Year

462nd Year

463rd Year

464th Year

465th Year

466th Year

467th Year

468th Year

469th Year

470th Year

471st Year

472nd Year

473rd Year

474th Year

475th Year

476th Year

477th Year

478th Year

479th Year

480th Year

481st Year

482nd Year

483rd Year

484th Year

485th Year

486th Year

487th Year

488th Year

489th Year

490th Year

491st Year

492nd Year

493rd Year

494th Year

495th Year

496th Year

497th Year

498th Year

499th Year

500th Year

501st Year

502nd Year

503rd Year

504th Year

505th Year

506th Year

507th Year

508th Year

509th Year

510th Year

511st Year

512nd Year

513th Year

514th Year

515th Year

516th Year

517th Year

518th Year

519th Year

520th Year

521st Year

522nd Year

523rd Year

524th Year

525th Year

526th Year

527th Year

528th Year

529th Year

530th Year

531st Year

532nd Year

533rd Year

534th Year

535th Year

536th Year

537th Year

538th Year

539th Year

540th Year

541st Year

542nd Year

543rd Year

544th Year

545th Year

546th Year

547th Year

548th Year

549th Year

550th Year

551st Year

552nd Year

553rd Year

554th Year

555th Year

556th Year

557th Year

558th Year

559th Year

560th Year

561st Year

562nd Year

563rd Year

564th Year

565th Year

566th Year

567th Year

568th Year

569th Year

570th Year

571st Year

572nd Year

573rd Year

574th Year

575th Year

576th Year

577th Year

578th Year

579th Year

580th Year

581st Year

582nd Year

583rd Year

584th Year

585th Year

586th Year

587th Year

588th Year

589th Year

590th Year

591st Year

592nd Year

593rd Year

594th Year

595th Year

596th Year

597th Year

598th Year

599th Year

600th Year

601st Year

602nd Year

603rd Year

604th Year

605th Year

606th Year

607th Year

608th Year

609th Year

610th Year

611st Year

612nd Year

613th Year

614th Year

615th Year

616th Year

617th Year

618th Year

619th Year

620th Year

621st Year

622nd Year

623rd Year

624th Year

625th Year

626th Year

627th Year

628th Year

629th Year

630th Year

631st Year

632nd Year

633rd Year

634th Year

635th Year

636th Year

637th Year

638th Year

639th Year

640th Year

641st Year

642nd Year

643rd Year

644th Year

645th Year

646th Year

647th Year

648th Year

649th Year

650th Year

651st Year

652nd Year

653rd Year

654th Year

655th Year

656th Year

657th Year

658th Year

659th Year

660th Year

661st Year

662nd Year

663rd Year

664th Year

665th Year

666th Year

667th Year

668th Year

669th Year

670th Year

671st Year

672nd Year

673rd Year

674th Year

675th Year

676th Year

677th Year

678th Year

679th Year

680th Year

681st Year

682nd Year

683rd Year

684th Year

685th Year

686th Year

687th Year

688th Year

689th Year

690th Year

691st Year

692nd Year

693rd Year

694th Year

695th Year

696th Year

697th Year

698th Year

699th Year

700th Year

701st Year

702nd Year

703rd Year

704th Year

705th Year

706th Year

707th Year

708th Year

709th Year

710th Year

711st Year

712nd Year

713th Year

714th Year

715th Year

716th Year

717th Year

718th Year

719th Year

720th Year

721st Year

722nd Year

723rd Year

724th Year

725th Year

726th Year

727th Year

728th Year

729th Year

730th Year

731st Year

732nd Year

733rd Year

734th Year

735th Year

736th Year

737th Year

738th Year

739th Year

740th Year

741st Year

742nd Year

743rd Year

744th Year

745th Year

746th Year

747th Year

748th Year

749th Year

750th Year

751st Year

752nd Year

753rd Year

754th Year

755th Year

756th Year

757th Year

758th Year

759th Year

760th Year

761st Year

762nd Year

763rd Year

764th Year

765th Year

766th Year

767th Year

768th Year

769th Year

770th Year

771st Year

772nd Year

773rd Year

774th Year

775th Year

776th Year

777th Year

778th Year

779th Year

780th Year

781st Year

782nd Year

783rd Year

784th Year

785th Year

786th Year

787th Year

788th Year

789th Year

790th Year

791st Year

792nd Year

793rd Year

794th Year

795th Year

796th Year

797th Year

798th Year

799th Year

800th Year

801st Year

802nd Year

803rd Year

804th Year

805th Year

806th Year

807th Year

808th Year

809th Year

810th Year

811st Year

812nd Year

813th Year

814th Year

815th Year

816th Year

817th Year

818th Year

819th Year

820th Year

821st Year

822nd Year

823rd Year

824th Year

825th Year

826th Year

827th Year

828th Year

829th Year

830th Year

831st Year

832nd Year

833rd Year

834th Year

835th Year

836th Year

837th Year

838th Year

839th Year

840th Year

841st Year

842nd Year

843rd Year

844th Year

845th Year

846th Year

847th Year

848th Year

849th Year

850th Year

851st Year

852nd Year

853rd Year

854th Year

855th Year

856th Year

857th Year

858th Year

859th Year

860th Year

861st Year

862nd Year

863rd Year

864th Year

865th Year

866th Year

867th Year

868th Year

869th Year

870th Year

871st Year

872nd Year

873rd Year

874th Year

875th Year

876th Year

877th Year

878th Year

879th Year

880th Year

881st Year

882nd Year

883rd Year

884th Year

885th Year

886th Year

887th Year

888th Year

889th Year

890th Year

891st Year

892nd Year

893rd Year

894th Year

895th Year

896th Year

897th Year

898th Year

899th Year

900th Year

901st Year

902nd Year

903rd Year

904th Year

905th Year

906th Year

907th Year

908th Year

909th Year

910th Year

911st Year

912nd Year

913th Year

914th Year

915th Year

916th Year

917th Year

918th Year

919th Year

920th Year

921st Year

922nd Year

923rd Year

924th Year

925th Year

926th Year

927th Year

928th Year

929th Year

930th Year

931st Year

932nd Year

933rd Year

934th Year

935th Year

936th Year

937th Year

938th Year

939th Year

940th Year

941st Year

942nd Year

943rd Year

944th Year

945th Year

946th Year

947th Year

948th Year

949th Year

950th Year

951st Year

952nd Year

953rd Year

954th Year

955th Year

956th Year

957th Year

958th Year

959th Year

960th Year

961st Year

962nd Year

963rd Year

964th Year

965th Year

966th Year

967th Year

968th Year

969th Year

970th Year

971st Year

972nd Year

973rd Year

974th Year

975th Year

976th Year

977th Year

978th Year

979th Year

980th Year

981st Year

982nd Year

983rd Year

984th Year

985th Year

986th Year

987th Year

988th Year

989th Year

990th Year

991st Year

992nd Year

993rd Year

994th Year

995th Year

996th Year

997th Year

998th Year

999th Year

1000th Year

Application Management

Build a paperless admissions process for students. Provide customized admission portals for students and counsellors.

Easily manage admission processes like Group Discussions, Personal Interview schedules, etc.

- 360° Student profile
- Admission portal for students with DIY application forms
- Automated admission workflows for document verification, scheduling GD, PI, etc.
- Assessment platform integrations
- Payment gateway integration & token fee collection
- Advanced analytics

Enrollment Marketing

Engage with students through hyper-personalized enrollment marketing automation. Send targeted, personalized, relevant, and timely communication to students and parents. LeadSquared's Higher Education CRM provides you with all the tools you need to drive more enrollments.

- Email Marketing
- Retargeting channels insights
- Advanced workflows and drip campaigns
- High-converting landing pages
- Communication channel integrations
- Campaign performance analytics
- Target vs. achievement analytics

What is a CRM for colleges?



CRM stands for **customer relationship management** and for colleges and universities, a single CRM solution can be implemented to unify and to manage all contacts from prospective students to enrolled students to alumni and donors. Centralizing this data allows schools to have a 360 degree view of their constituents. 1 ஜூன், 2022

How is CRM used in university?



First, let's define what CRM is – customer relationship management. CRM higher education technology enables institutions to manage relationships with all of their customers (including students, alumni, faculty, staff, and corporate partners) and connect insights from those interactions in a unified view.

What are the five benefits of CRM?



Benefits of CRM for enterprises and small businesses

- **Trustworthy reporting.**
- **Dashboards that visually showcase data.**
- **Improved messaging with automation.**
- **Proactive service.**
- **Efficiency enhanced by automation.**
- **Simplified collaboration.**

What is CRM for schools?

customer relationship management

First, let's define what CRM is – **customer relationship management**. CRM higher education technology enables institutions to manage relationships with all of their customers (including students, alumni, faculty, staff, and corporate partners) and connect insights from those interactions in a unified view.

What are the top 5 advantages of CRM?

Benefits of CRM for enterprises and small businesses

- **Trustworthy reporting.**
- **Dashboards that visually showcase data.**
- **Improved messaging with automation.**
- **Proactive service.**
- **Efficiency enhanced by automation.**
- **Simplified collaboration.**



What are some disadvantages of CRM?

Potential drawbacks of CRM systems

- **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.**

Disadvantages of CRM



Why do you need a CRM application?



By intelligently storing and managing your customers' information, 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.