Salesforce 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

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

Accounts & Contacts for

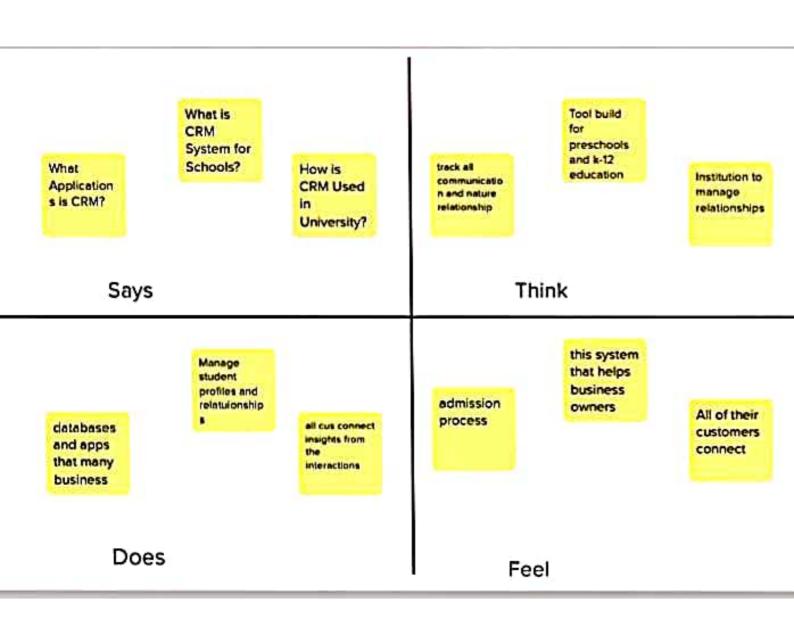
Data Model

Data Modeling
Leads & Opportunities for
Lightning Experience
Lightning Experience
Productivity
Formulas and Validations
Data Security

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



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.

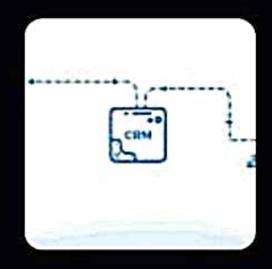
Collaborative CRM: This type of CRM software is focused on fostering collaboration and communication among teams. It can be used to share customer data and information, as well as to manager workflow and projects.

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

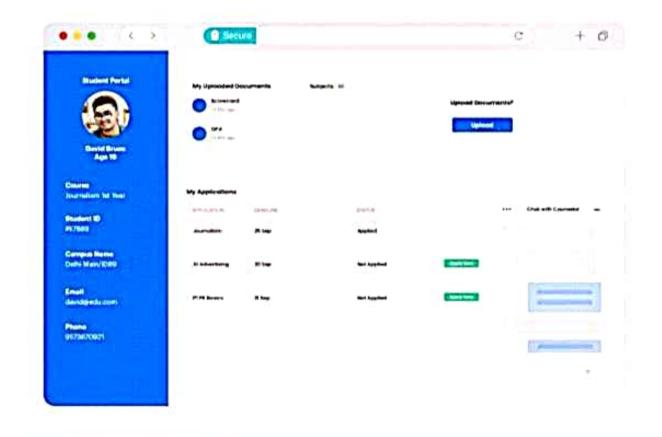
Complete admissions platform for student acquisition, application tracking, student journey tracking, enrollment, and more.

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





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 hyperpersonalized 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 2061, 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

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What are the top 5 advantages of CRM?

Benefits of CRM for enterprises and small businesses

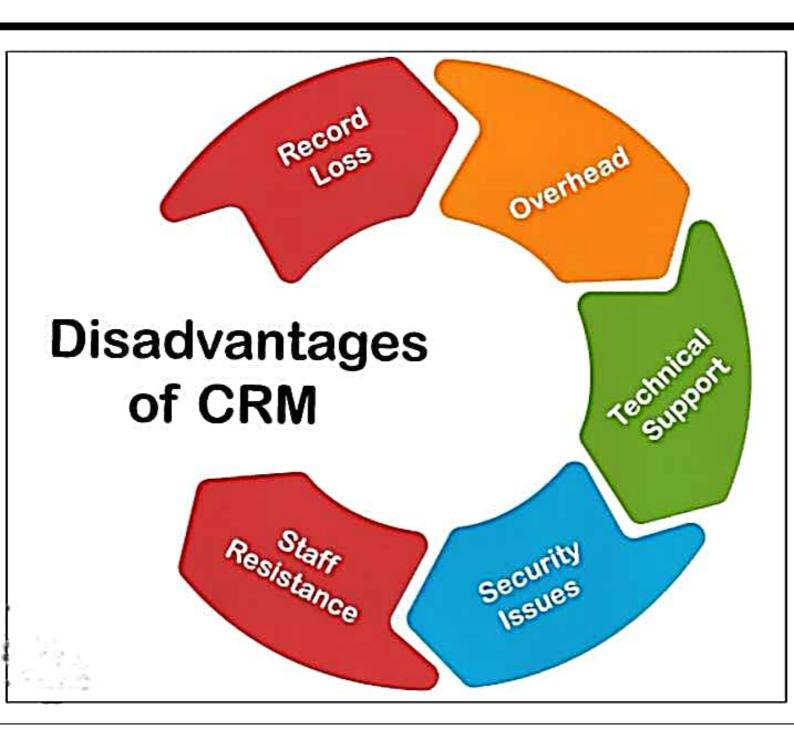
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What are some disadvantages of CRM?

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.



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.