

CRM APPLICATION FOR SCHOOLS /COLLEGES



1 INTRODUCTION

1.1 Overview

CRM Stands for customer relationship management. It helps schools and education institutions automate admission process and manage communication with students and parents.

1.2 Purpose

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

2 Problem Definition & Design Thinking

2.1 Empathy Map

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Keys
What facts or facts from us?
What can we imagine from using?

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Does
What capabilities or objects of what can we imagine from doing?

Feels
What are their fears, frustrations, and doubts? What other feelings might influence their behavior?

The project aim is Knowledge for all the students

The Project will also help these professionals

Basic Knowledge of Salesforce & Real-time Project

Before Salesforce, your contents, results, follow-up tasks.

For the job application we create custom.

It is better to run the process in a smooth way and easily to track.

Salesforce is game-changing technology

Test cases, that will help you sell smarter and faster.

The relationships to store and access the data

The employees and partners, and store your data securely in the cloud.

Salesforce? Not sure exactly what it is, or how to use it?

As you work forward your budget for this module.

1

Need some inspiration?

See a finished version of this template in action to get ideas.

[Open example](#)

2.2 Ideation & Brainstorming Map



3 RESULT

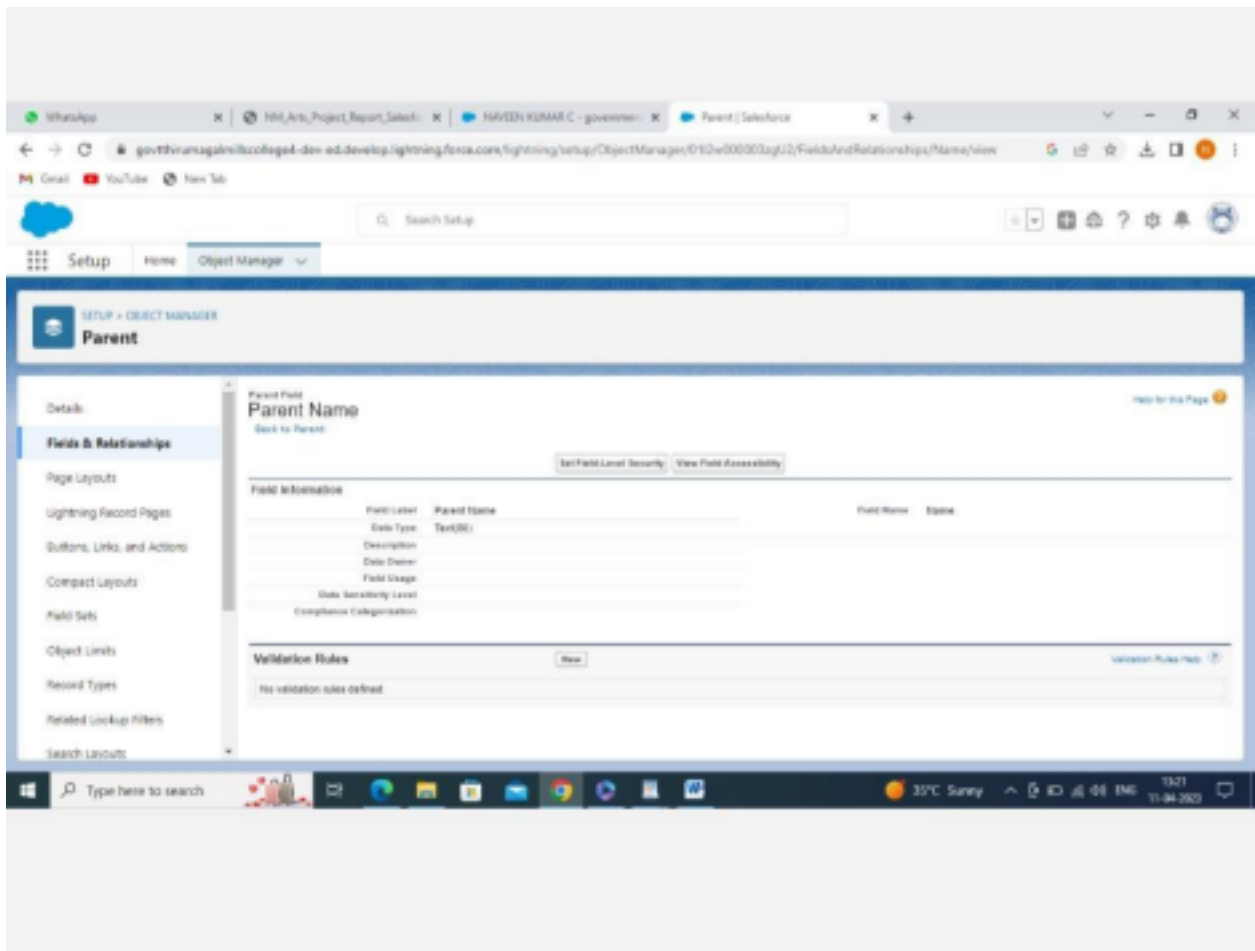
3.1 Data Model:

Object name	Field in the Object		
Obj 1	Field label	Data type	
	Parent Name	Text (80)	
	Parent Address	Text Area	
	Parent Number	Phone	
Obj 2	School	Text Area	
	School Name	Text (80)	
	Sales	Text Area	

3.2 Activity & Screenshot

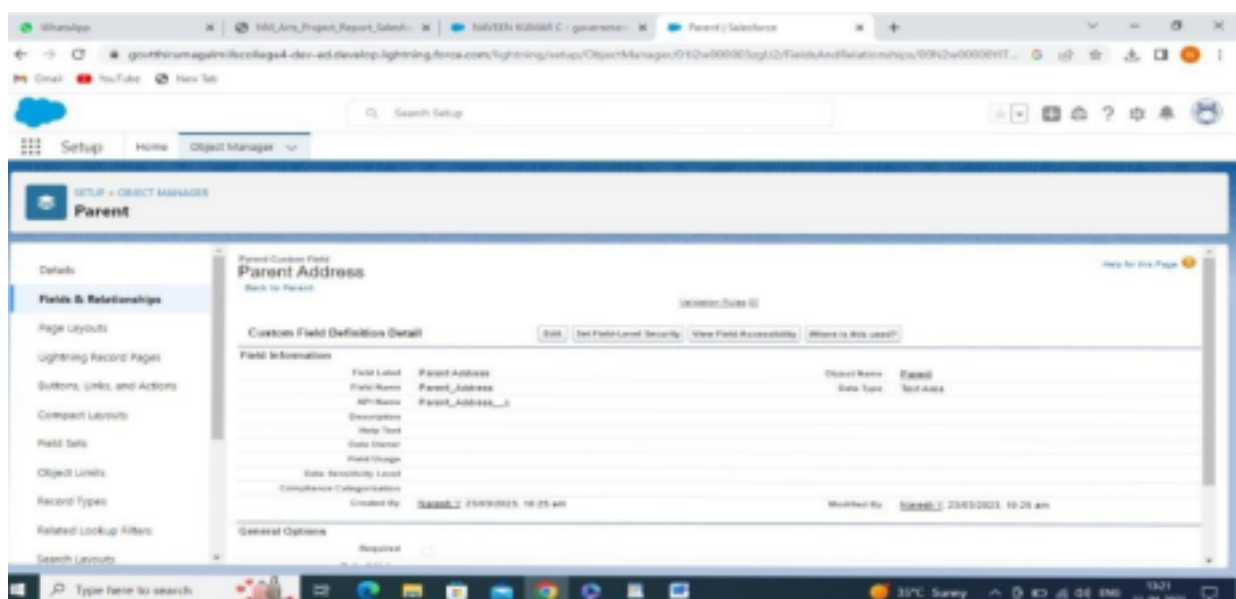
Activity 1:-

You need to Go Set Up -> Objects -> Child Object -> Relationship Field -> Child Relationship Name [This is child relationship name between parent and child objects].

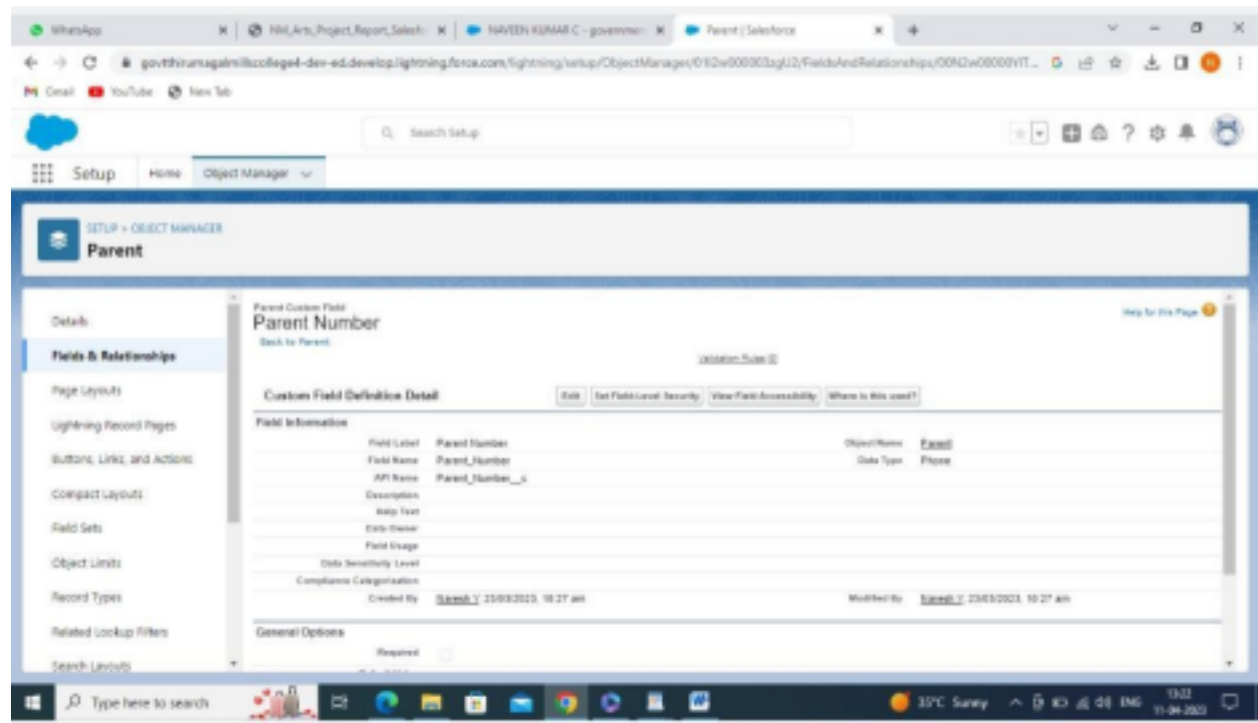


Activity 2:-

The primary object will be the parent address for any other objects defined. Parent Address objects are required if all information is stored under the parent object.



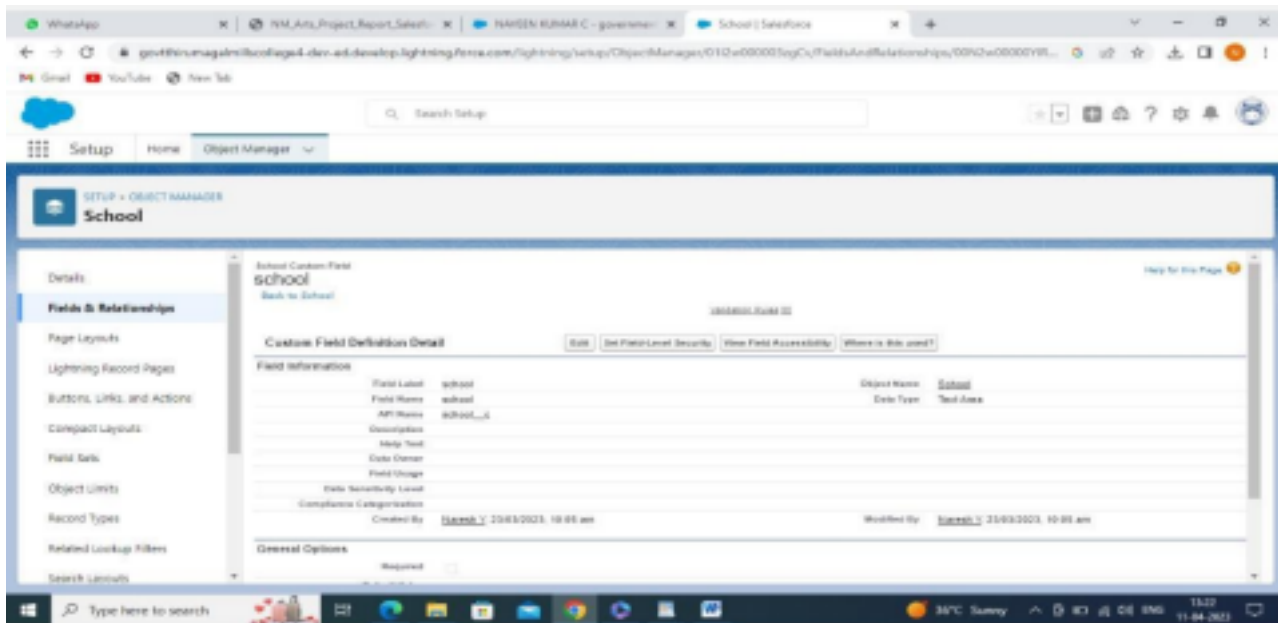
Activity 3:-



The object which has the more number of records will be the parent object and the object which has fewer records is considered as the child object.

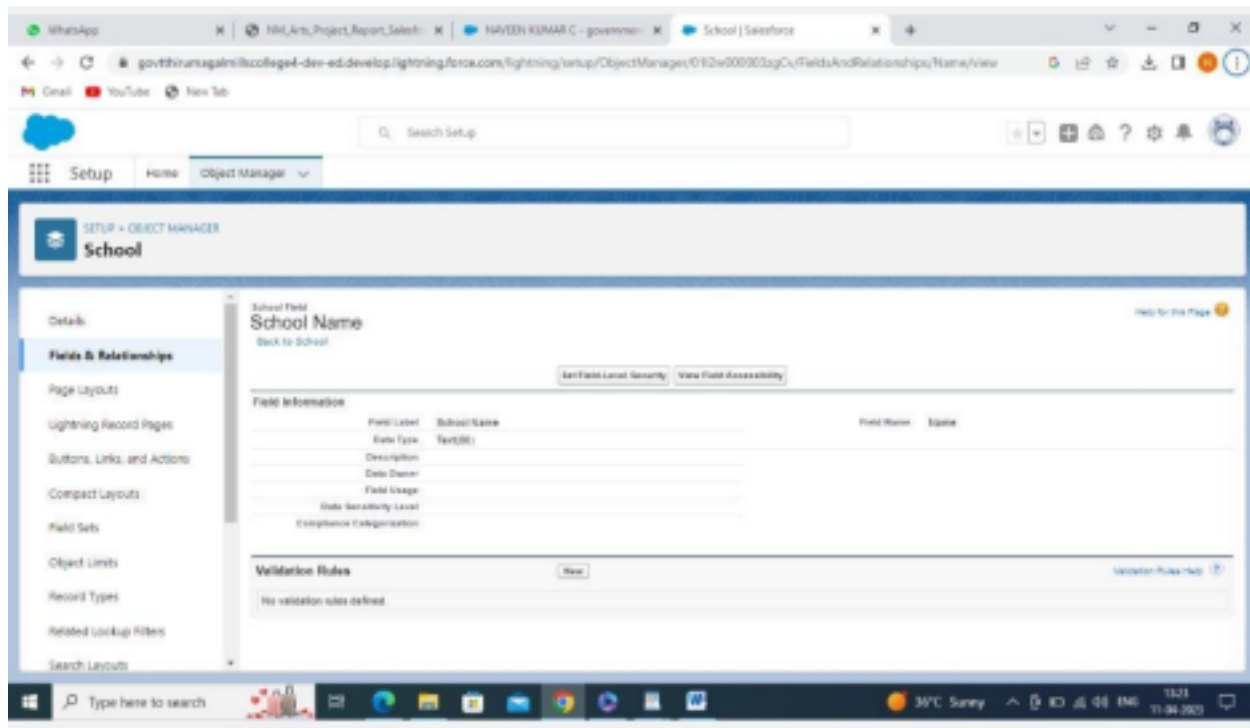
Activity 4:-

Salesforce.org Education Cloud is the complete customer relationship management software for colleges and universities.



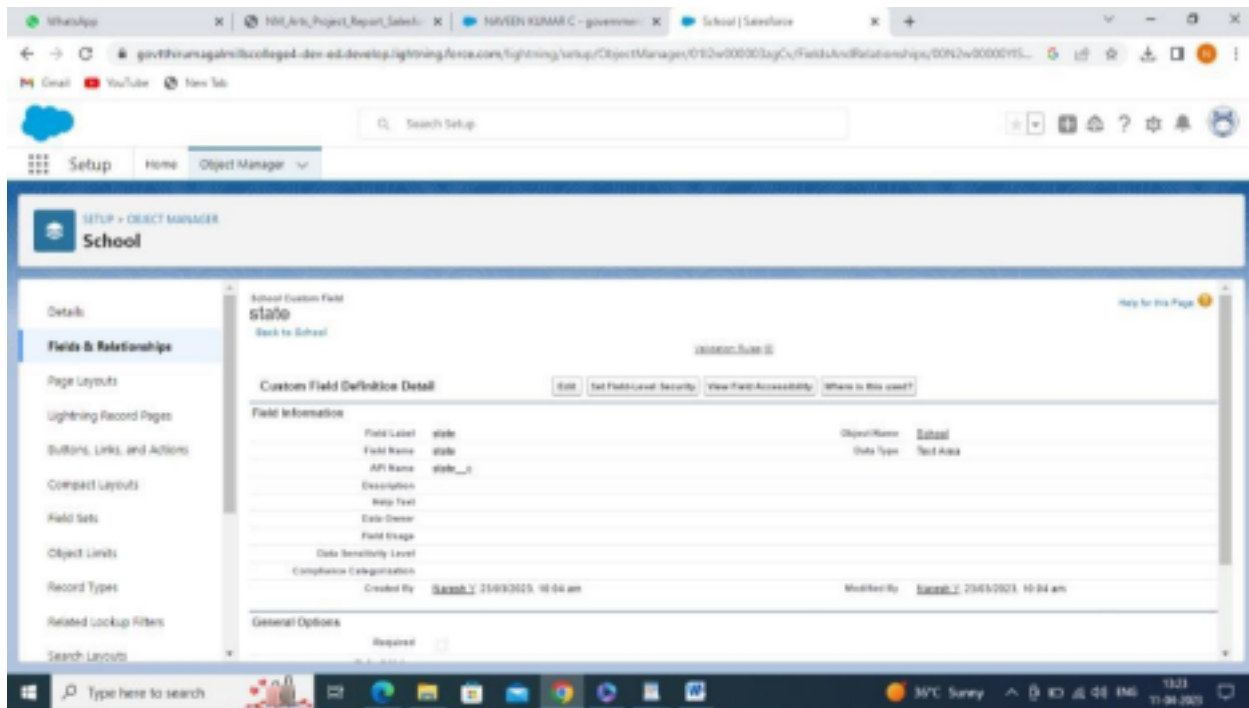
Activity 5:-

This should return a list of Students and should contain any Pire and School information associated with that student.



Activity 6:-

CRM applications for sales, service, marketing, and more don't require IT experts to set up or manage – simply log in and start connecting to customers in a whole new way.



4 Trailhead Profile Public URL

Team lead - <https://trailblazer.me/id/narey5>

Team Member 1 - <https://trailblazer.me/id/plakshmi116>

Team Member 2 - <https://trailblazer.me/id/rosh34>

Team Member 3 - LA

5 ADVANTAGES & DISADVANTAGES

Advantages

1. Trustworthy reporting.
2. Dashboards that visually showcase data.
3. Improved messaging with automation.
4. Proactive service.
5. Efficiency enhanced by automation.

Disadvantages

1. Software subscription or purchase fees.
2. Premium upgrades, eg add-on marketing or reporting features.
3. Customisation.
4. IT resources needed.
5. Hardware or software requirements.

6 APPLICATIONS

1.Improved Informational Organization.

2.CRM for Enhanced Communication.

3.CRM Improves Your Customer Service.

- 4.Automation of Everyday Tasks.
- 5.Greater efficiency for multiple teams.
- 6.Improved Analytical Data and Reporting.

7 CONCLUSION

Start by Setting Goals Keep Your CRM System Updated and Up-to-Date. Improve Your CRM System for Better Performance and Efficiency. Keep Track of Customers' Purchases, Demands, and Experiences to Make a Good Customer Relationship.

8 FUTURE SCOPE

The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business. Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.