

CRM-APPLICATION FOR SCHOOL/COLLEGES

1 INTRODUCTION

1.1 Overview

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

1.2 PURPOSE

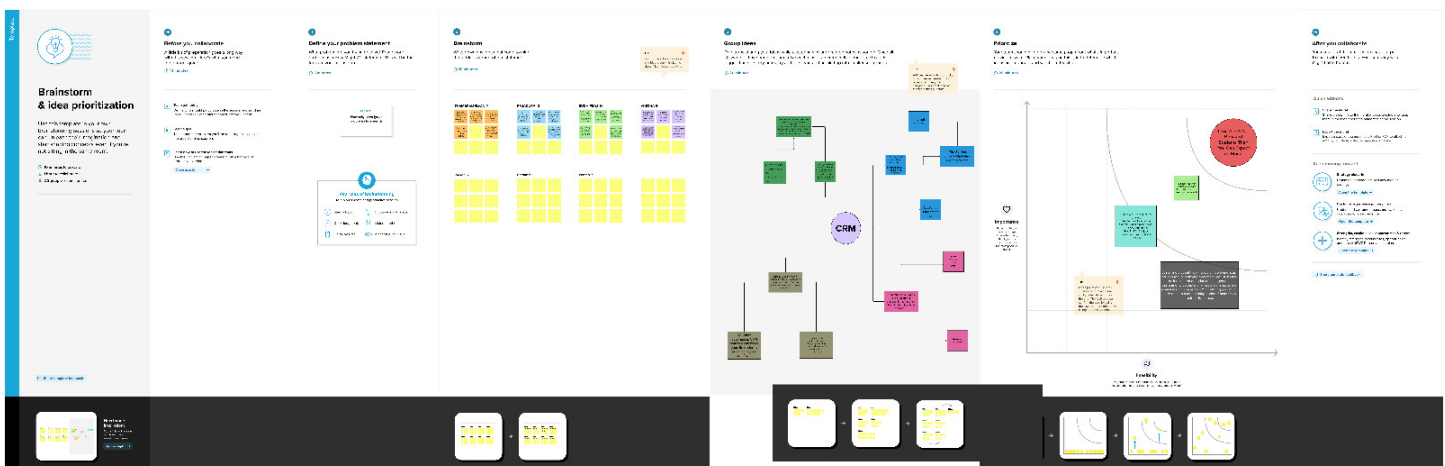
Customer relationship management (CRM) is a technology for managing all your Company's relationships and interactions with customers and potential customers.

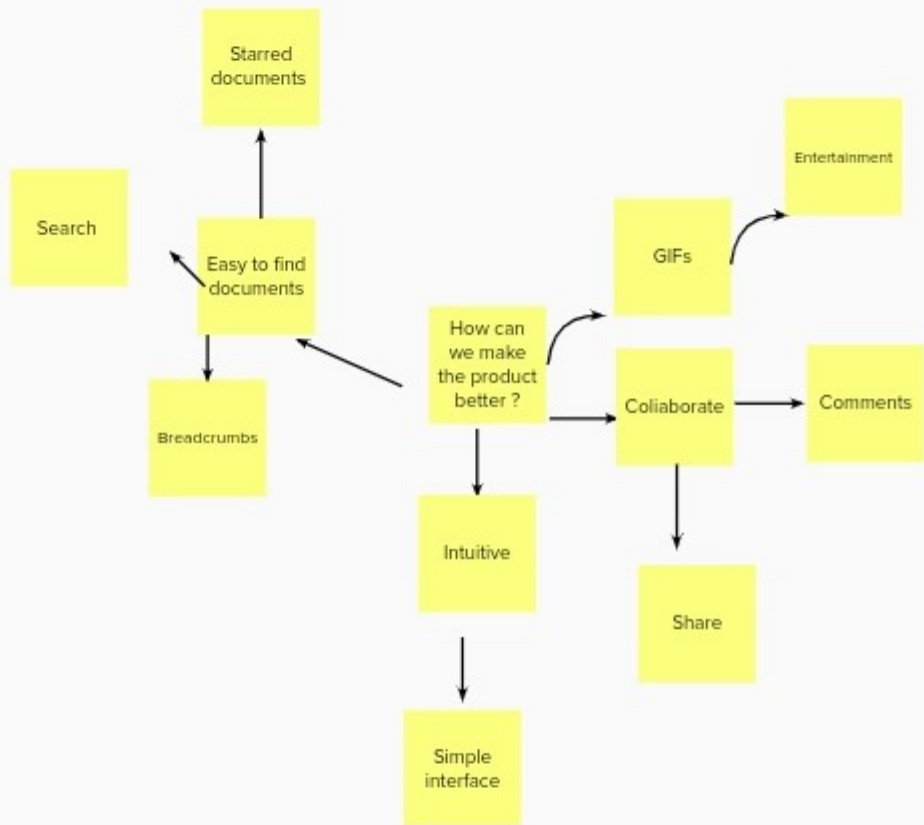
The goal is simple improve business relationships. A CRM system helps companies stay Connected to customers, streamline, processes, and improve profitability.

2 Problem Definition & Design Thinking

2.1 Empathy Map

2.2. Ideation & Brainstorming Map





3RESULT

3.1 Data Model

Object name	Fields in the Object	
School		
	Field Label	Data Type
	Address	Text Area
	District	Text Area
	State	Text Area
	school	Text Area
	Phone Number	Phone
	Number of Students	Roll-up summery
	Highest Marks	Roll-up summery

Object name	Fields in the Object

Student	Field Label	Data Type
	Phone number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number
Parent	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

(Milestone-2:OBJECT)

Activity-1: Creation of School Object

Creation of Object for School Management

Screenshot of the Salesforce Object Manager interface. The browser address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj>. The page title is "Object Manager" and it shows "1 Items, Sorted by Label". The search bar contains "School". The table below lists the object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School__c	Custom Object		08/04/2023	✓

(Milestone-2:OBJECT)

Activity-2: Create Student Object

Creation of Student Object

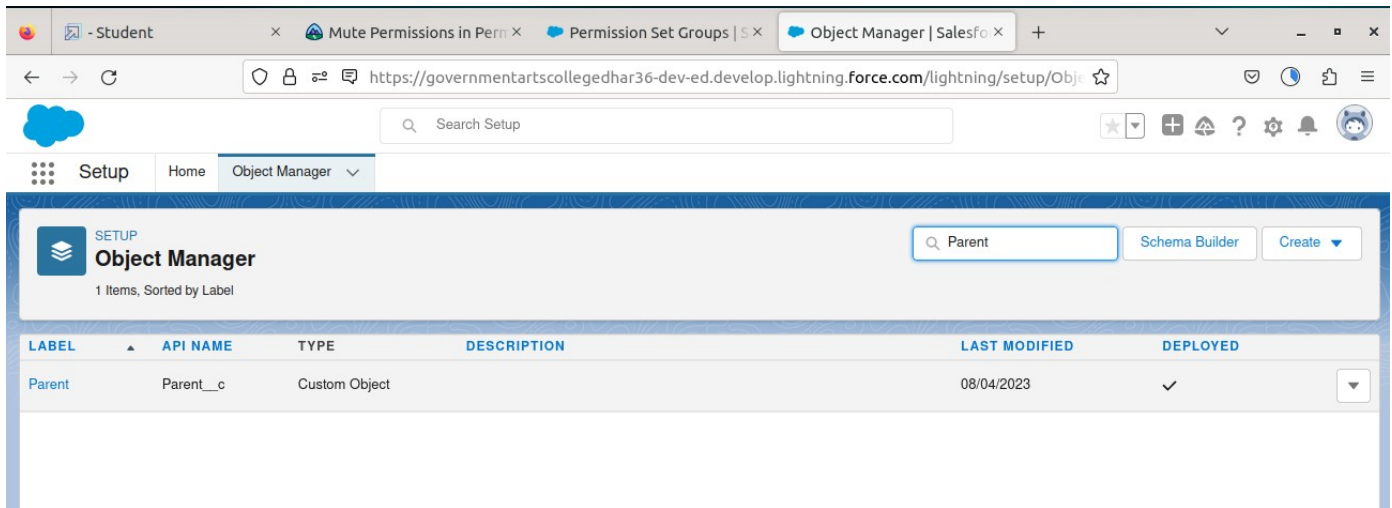
Screenshot of the Salesforce Object Manager interface showing the "Student" object. The browser address bar shows the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Obj>. The page title is "Object Manager" and it shows "1 Items, Sorted by Label". The search bar contains "Student". The table below lists the object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Students	Students__c	Custom Object		08/04/2023	✓

(Milestone-2: OBJECT)

Activity-2 : Create Parent Object

Creation of Parent Object



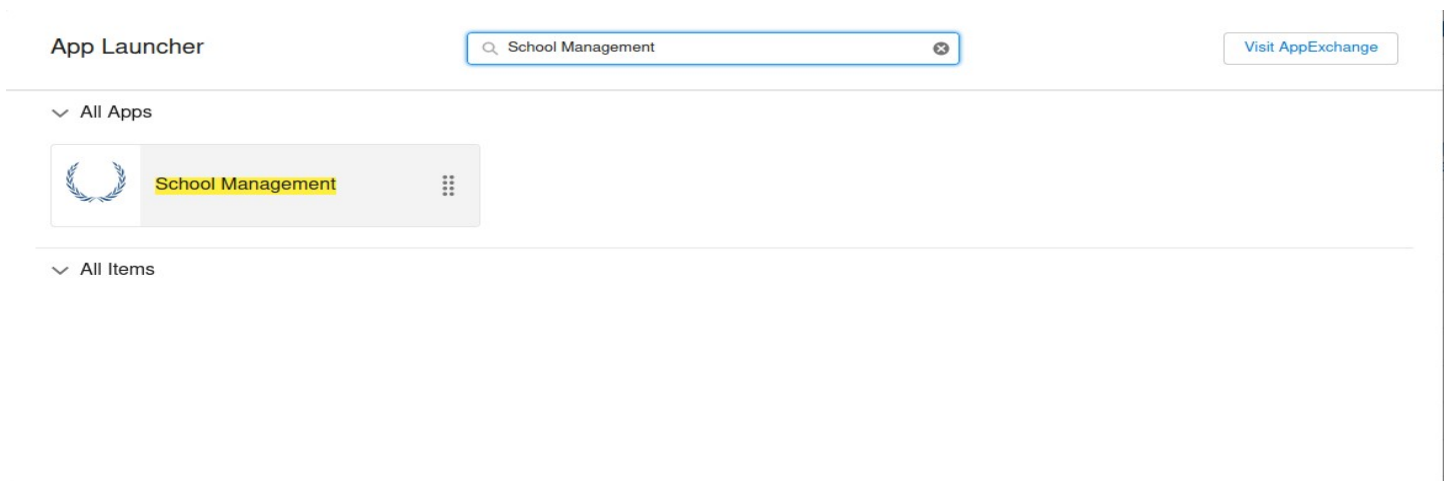
The screenshot shows the Salesforce Object Manager setup page. The browser address bar displays the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/ObjManager>. The page header includes a search bar with the text "Search Setup" and a "Create" button. The main content area is titled "Object Manager" and shows a list of objects. The table below contains the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Parent	Parent__c	Custom Object		08/04/2023	✓

(Milestone-3: LIGHTNING APP)

Activity-1 : Create the School Management App

Creation School Management App



The screenshot shows the Salesforce App Launcher. The search bar contains the text "School Management". The "Visit AppExchange" button is visible. The "All Apps" section shows a card for "School Management" with a laurel wreath icon. The "All Items" section is empty.

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-1 : Creation of fields for the School Objects

Creation of fields for the School Object

The screenshot displays the Salesforce Setup interface for the 'School' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields for the 'School' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Address, Created By, District, Highest Marks, Last Modified By, Number of Students, Owner, and Phone Number. The 'Owner' field is marked as indexed. Below the table, there are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The bottom of the image shows a partial view of the 'Record Types' section, listing 'School Name', 'School Websites', and 'State'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Students)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Students)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		

Record Type	Field Label	Field Name	Data Type	Indexed
School Name	Name	Name	Text(80)	✓
School Websites	School_Websites__c	School_Websites__c	Text Area(255)	
State	State__c	State__c	Text Area(255)	

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-2 : Creation of fields for the Student Objects

Creation of fields for the Student Object

The screenshot shows the Salesforce Setup interface for the 'Students' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a list of 8 fields. The fields are: Class (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Marks (Number(18, 0)), Phone Number (Phone), Results (Picklist), School (Master-Detail(School)), and Students Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Students Name	Name	Text(80)		✓

(Milestone-4: FIELDS & RELATIONSHIP)

Activity-3: Creation of fields for the Parent Objects

Creation of fields for the Parents Object

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a list of 6 fields. The fields are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Parent Address (Text Area(255)), Parent Name (Text(80)), and Parent Number (Number(18, 0)).

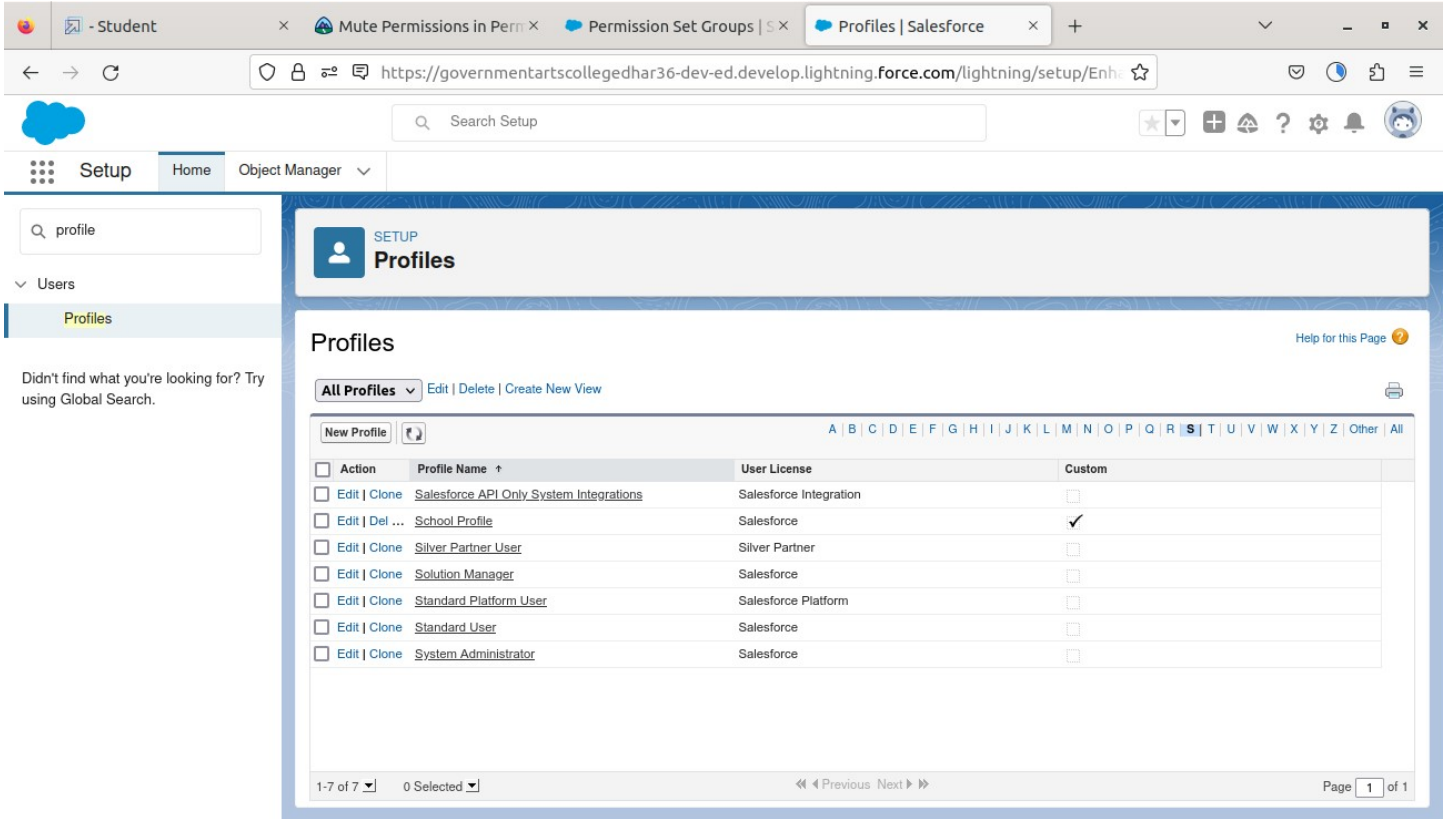
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Number(18, 0)		

<https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003XmBm/FieldsAndRelationships/CreatedBy/view>

(Milestone-5: PROFILE)

Activity-1 : Creation on Profile

Creation on Profiles



The screenshot shows the Salesforce Setup interface for Profiles. The browser address bar displays the URL: <https://governmentartscollegedhar36-dev-ed.develop.lightning.force.com/lightning/setup/Enhance>. The left sidebar contains a search bar with the text "profile" and a list of navigation items: "Users" and "Profiles". The main content area is titled "Profiles" and includes a "Help for this Page" link. Below the title, there are links for "All Profiles", "Edit", "Delete", and "Create New View". A "New Profile" button is also present. The table below lists existing profiles with columns for Action, Profile Name, User License, and Custom.

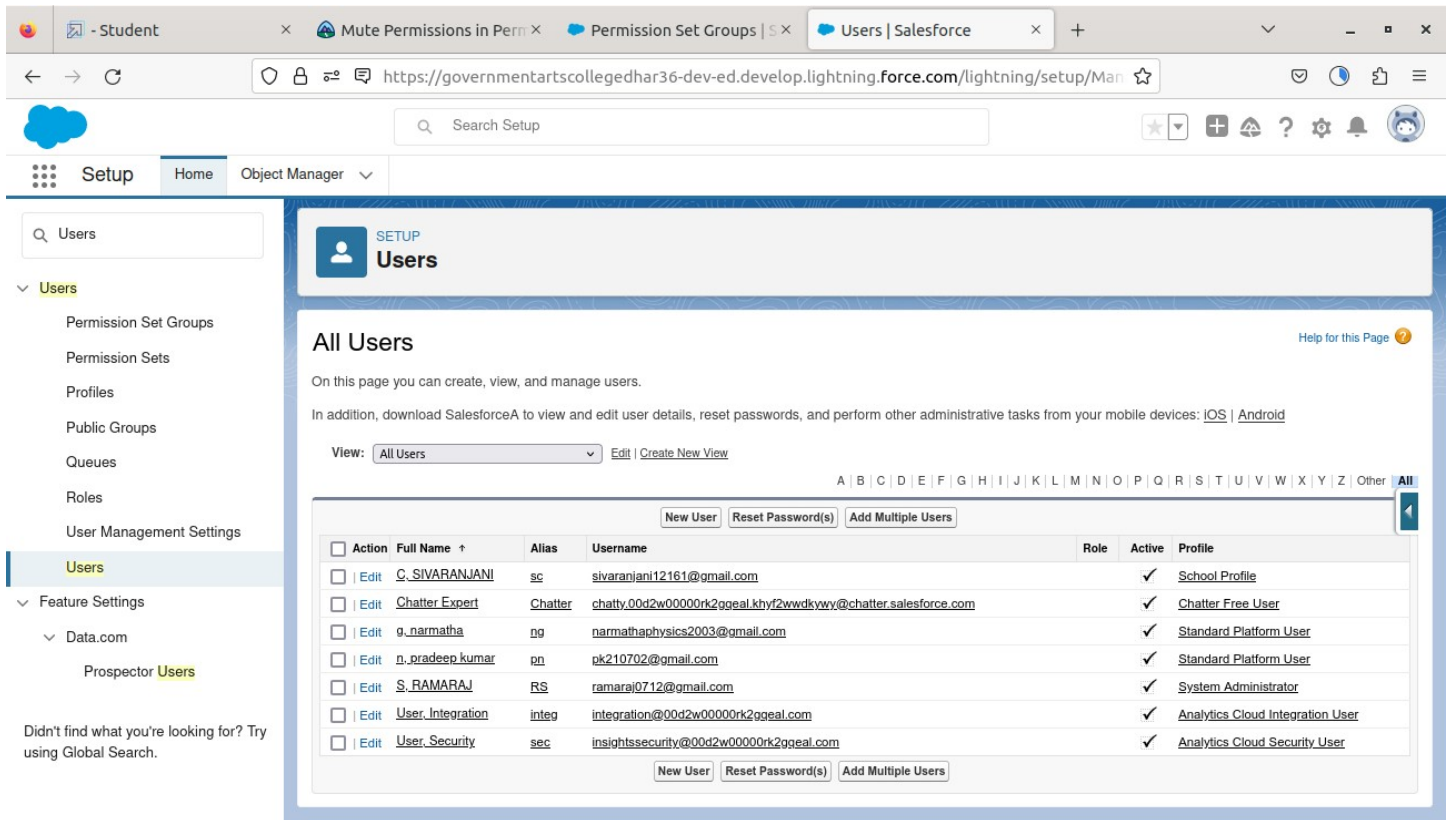
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	School Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

At the bottom of the table, there is a pagination bar showing "1-7 of 7" and "0 Selected". The page number "1" is displayed in the bottom right corner.

(Milestone-6: USERS)

Activity-1 : Creating a Users

Creating a Users



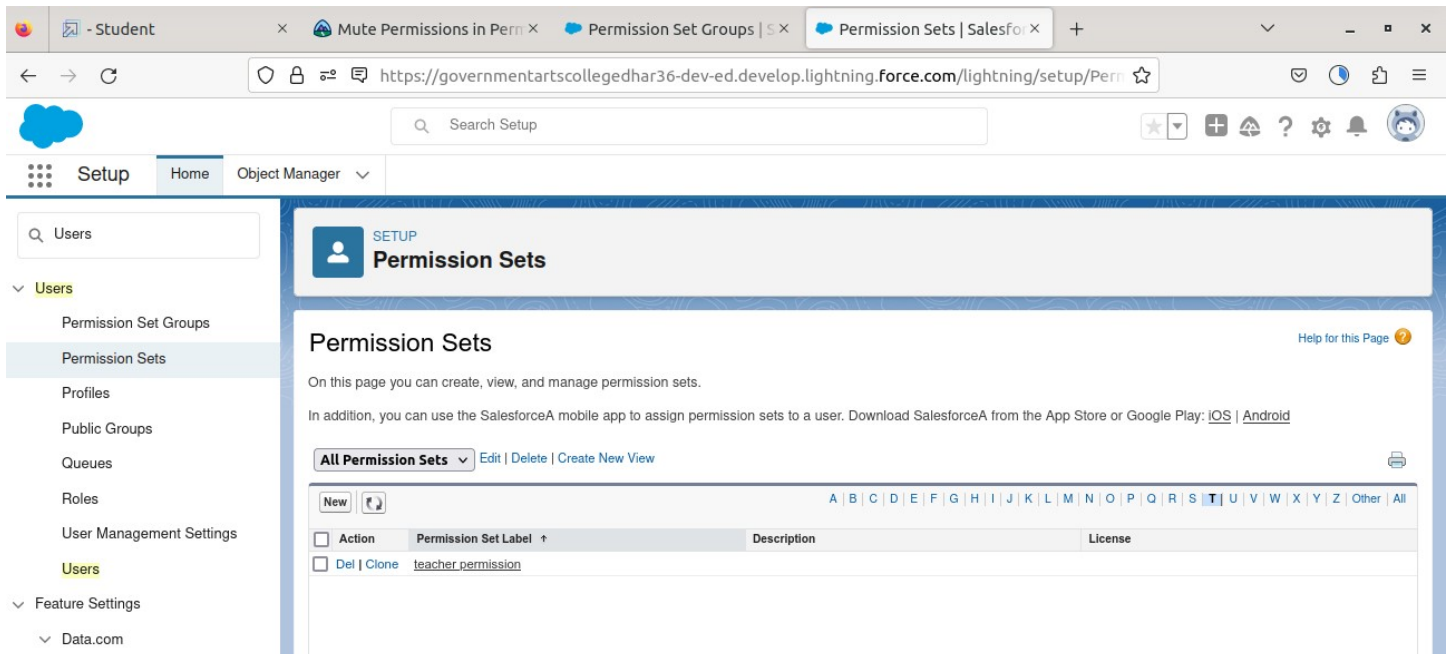
The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Profiles, and Roles. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed include C. SIVARANJANI, Chatter Expert, g. narmatha, n. pradeep kumar, S. RAMARAJ, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	C. SIVARANJANI	sc	sivaranjani12161@gmail.com		✓	School Profile
Edit	Chatter Expert	Chatter	chatty.00d2w0000rk2ggeal.khyf2wwdkywy@chatter.salesforce.com		✓	Chatter Free User
Edit	g. narmatha	ng	narmathaphysics2003@gmail.com		✓	Standard Platform User
Edit	n. pradeep kumar	pn	pk210702@gmail.com		✓	Standard Platform User
Edit	S. RAMARAJ	RS	ramaraj0712@gmail.com		✓	System Administrator
Edit	User Integration	integ	integration@00d2w0000rk2ggeal.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w0000rk2ggeal.com		✓	Analytics Cloud Security User

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1:

To Set Permissions



The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Profiles, and Roles. The main content area is titled 'Permission Sets' and includes a table of existing permission sets. The table has columns for Action, Permission Set Label, Description, and License. The permission set listed is 'teacher_permission'.

Action	Permission Set Label	Description	License
Del Clone	teacher_permission		

(Milestone-7: PERMISSION SETS)

Activity-2 : Permission sets 2:

To Set Permissions

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, and Data.com. The main content area is titled 'Permission Sets' and includes a search bar, a 'Help for this Page' link, and a description of the page's purpose. Below the description, there are links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A table with columns 'Action', 'Permission Set Label', 'Description', and 'License' is visible, showing a single entry for 'Principal permission'.

(Milestone-8: REPORTS)

Activity-1 : Reports

Reports

The screenshot shows the Salesforce Reports page. The left sidebar contains a navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More. The main content area is titled 'Reports' and includes a search bar, a 'New Report' button, and a 'New Folder' button. Below the buttons, there is a table with columns 'REPORTS', 'R...', 'Description', 'Folder', 'Created By', 'C', and 'Subscribed'. The table lists several reports, including 'SUDEN TS', 'New Schools Report', 'PAREN TS', and 'New Account s Report'.

REPORTS	R...	Description	Folder	Created By	C	Subscribed
Recent						
Created by Me	SUDEN TS		Private Reports	RAMARAJ S	9/4/2023, 9:25 pm	✓
Private Reports						
Public Reports	New Schools Report		RAM	RAMARAJ S	8/4/2023, 5:53 pm	✓
All Reports						
FOLDERS	PAREN TS		Private Reports	RAMARAJ S	9/4/2023, 9:23 pm	✓
All Folders						
Created by Me	New Account s Report		Private Reports	RAMARAJ S	17/3/2023, 9:40 pm	✓
Shared with Me						
FAVORITES						
All Favorites						

Transferring data from governmentartscollegedhar36-dev-ed.develop.lightning.force.com...

4 Trailhead Profile Public URL

Team Leader - <http://trailblazer.me/id/srajn9>
Team Member 1 - <https://trailblazer.me/id/vinig12>
Team Member 2 - <https://trailblazer.me/id/tselvan49>
Team Member 3 - <https://trailblazer.me/id/rdurai23>

5 ADVANTAGES & DISADVANTAGE

Advantages

Facilitates discovery of new customers

CRM systems are useful in identifying potential customers. They keep track of the profiles of the existing clientele and can use them to determine the people to target for maximum clientage returns. New customers are an indication of future growth. However, a growing business utilizing CRM software should encounter a higher number of existing customers versus new prospects each week. Growth is only essential if the existing customers are maintained appropriately even with recruitment of new prospects.

Increases customer revenues

CRM data ensures effective co-ordination of marketing campaigns. It is possible to filter the data and ensure the promotions do not target those who have already purchased particular products. Businesses can also use the data to introduce loyalty programs that facilitate a higher customer retention ratio. No business enjoys selling a similar product to a customer who has just bought it recently. A CRM system coordinates customer data and ensures such conflicts do not arise.

Helps the sales team in closing deals faster

A CRM system helps in closing faster deals by facilitating quicker and more efficient responses to customer leads and information. Customers get more convinced to turn their inquiries into purchases once they are responded to promptly. Organizations that have successfully implemented a CRM system have observed a drastic decrease in turnaround time.

Enhances effective cross and up selling of products

Cross – selling involves offering complimentary products to customers based on their previous purchases. On the other hand, up – selling involves offering premium products to customers in the same category. With a CRM system, both cross and up – selling can be made possible within a few minutes of cross – checking available data.

Apart from facilitating quicker offers to customers, the two forms of selling helps staff in gaining a better understanding of their customer's needs. With time, they can always anticipate related purchases from their customer.

Simplifies the sales and marketing processes

A CRM system facilitates development of better and effective communication channels. Technological integrations like websites and interactive voice response systems can make work easier for the sales representatives as well as the organization. Consequently, businesses with a CRM have a chance to provide their customers with various ways of communication. Such strategies ensure appropriate delivery of communication and quick response to inquiries and feedback from customers.

Makes call centers more efficient

Targeting clients with CRM software is much easier since employees have access to order histories and customer details. The software helps the organization's workforce to know how to deal with each customer depending upon their recorded archives. Information from the software can be instantly accessed from any point within the organization.

CRM also increases the time the sales personnel spend with their existing customers each day. This benefit can be measured by determining the number of service calls made each day by the sales personnel. Alternatively, it could also be measured through the face – to – face contact made by the sales personnel with their existing customers.

Enhances customer loyalty

CRM software is useful in measuring customer loyalty in a less costly manner. In most cases, loyal customers become professional recommendations of the business and the services offered. Consequently, the business can promote their services to new prospects based on testimonials from loyal customers. Testimonials are often convincing more than presenting theoretical frameworks to your future prospects. With CRM, it could be difficult pulling out your loyal customers and making them feel appreciated for their esteemed support.

Disadvantages

1. A costly project

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

2. Loss of collected information or records

CRM (customer relationship management) tools can be responsible for losing the customer's information as some CRM software keeps track of customers' information using remote internet connections. Due to this, sometimes organization needs to have control over the customer's information (detailed), especially when a system failure event happens. An unstable CRM can result in the loss of money in revenue for the company in the future.

3. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

4. It eliminates the human element.

CRM is a fully automated tool that has prevented human intervention. It automatically collects all the data and processes it. CRM efficiently manages the relationship between the company and customers as it directly interacts between people and its staff. Customers can shift anywhere due to the loss of human touch, reducing sales and revenue.

5. Can be accessed by the third party

As we know, CRM collects customers' sensitive information and stores it, which other parties can misuse. For example, web hosting companies take and sell collected data to a third party that misuses the data and causes loss to people.

6. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

6 APPLICATIONS

Applications of a CRM – Examples and Strategies

- * Application 1: Tracking Customers
- * Application 2: Collecting Data for Marketing
- * Application 3: Improving Interactions and Communications
- * Application 4: Streamlining Internal Sales Processes
- * Application 5: Planning Your Operations.

7 CONCLUSION

Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BMW has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has greatly diversified its customer roots to various market bases. Mercedes has majored in a customer-dealership business relationship. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the

company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in the automotive

8 FUTURE SCOPE

The future has arrived — at least it has in the world of customer relationship management or CRM software, one of the fastest growing categories of enterprise software. We are entering the era of intelligent, integrated CRM, and the future of CRM is even brighter. From small businesses to global enterprises, sales and marketing teams are adopting CRM to deliver better customer experiences, acquire and retain customers, and gain new customer-centric insights that are changing their companies for the better.

