CRM APPLICATION FOR SCHOOLS/COLLEGES
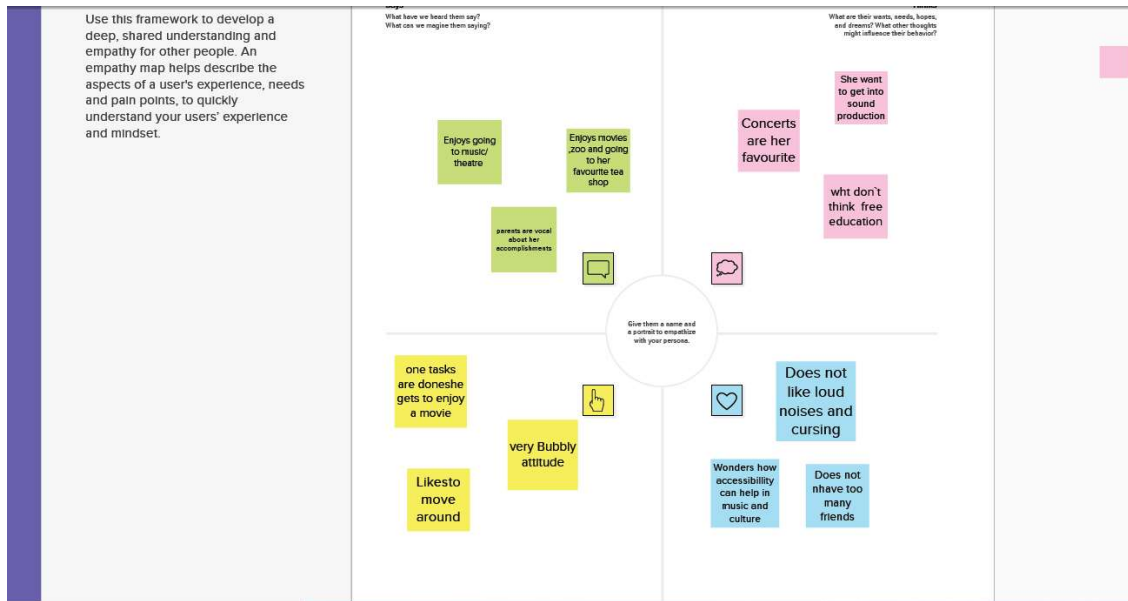
INTRODUCTION

1.1OVERVIEW

In this chapter readers will be provided with a background and problem discussion of the study at hand. Further, the defined research questions and the purpose of this research as well as delimitation and definition of key terms will be presented respectively.
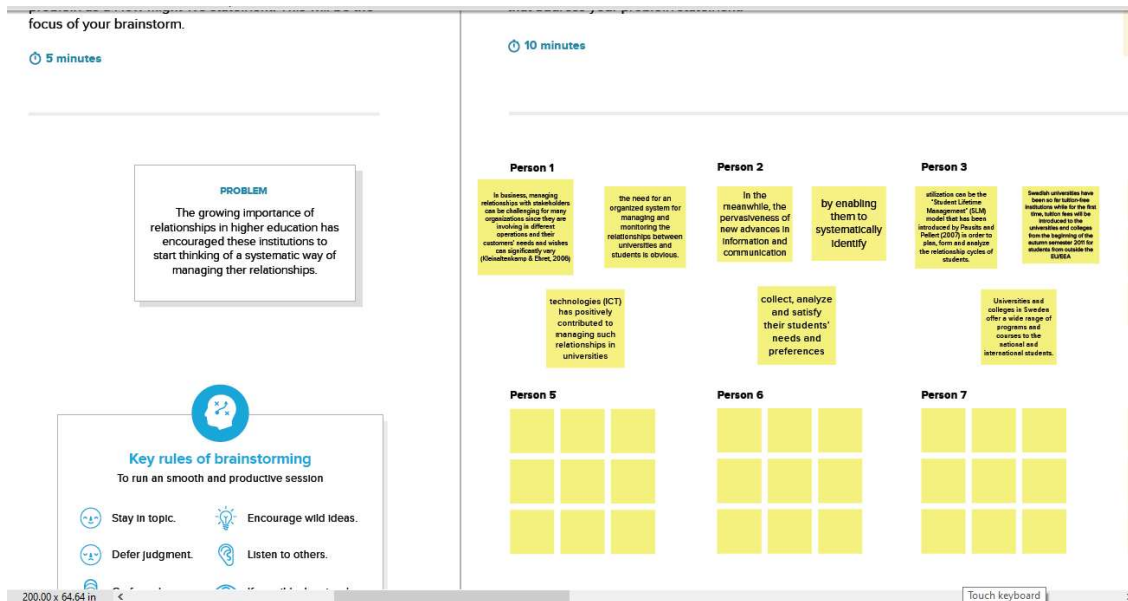
1.2 PURPOSE

 *   To identify, collect, store, manage and disseminate right knowledge about and from students' behaviors, needs, preferences, values, desires, problems and complaints in a systematic way.

* To create a collaborative student-centric environment inside Swedish universities which will lead them to engage in satisfying students' needs.

*An interface between Swedish universities and their international students as a tool of building effective communications with the aim of establishing, managing and retaining relationships with these students.
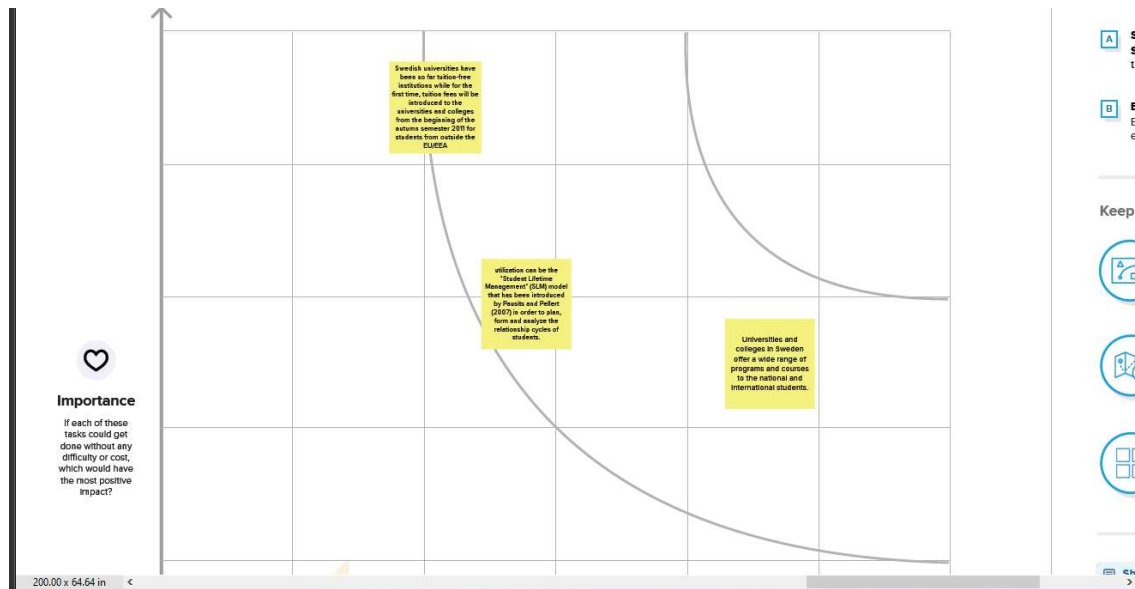
PROBLEM DEFINITION AND DESIGN THINKING

2.1 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.

What have we heard them say?
What can we imagine them saying?

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

Enjoys going to music/ theatre

Enjoys movies ,zoo and going to her favourite tea shop

Concerts are her favourite

She want to get into sound production

wht don`t think free education

parents are vocal about her accomplishments

Give them a name and a portrait to empathize with your persona.

one tasks are doneshe gets to enjoy a movie

very Bubbly attitude

Does not like loud noises and cursing

Likesto move around

Wonders how accessibillity can help in music and culture

Does not nhave too many friends

2.2 IDEATION AND BRAIN STORMING MAP

problem as a how might we statement. This will be the focus of your brainstorm.

that address your problem statement.

⏱ 5 minutes

⏱ 10 minutes

PROBLEM

The growing importance of relationships in higher education has encouraged these institutions to start thinking of a systematic way of managing ther relationships.

Key rules of brainstorming
To run an smooth and productive session

Stay in topic.

Encourage wild ideas.

Defer judgment.

Listen to others.

Person 1

In business, managing relationships with stakeholders can be challenging for many organizations since they are involving in different operations and their customers' needs and wishes can significantly very (Kleinaltenkamp & Ehret, 2006)

the need for an organized system for managing and monitoring the relationships between universities and students is obvious.

technologies (ICT) has positively contributed to managing such relationships in universities

Person 2

In the meanwhile, the pervasiveness of new advances in information and communication

by enabling them to systematically identify

collect, analyze and satisfy their students' needs and preferences

Person 3

utilization can be the "Student Lifetime Management" (SLM) model that has been introduced by Peusits and Pellert (2007) in order to plan, form and analyze the relationship cycles of students.

Swedish universities have been so far tuition-free institutions while for the first time, tuition fees will be introduced to the universities and colleges from the beginning of the autumn semester 2011 for students from outside the EU/EEA

Universities and colleges in Sweden offer a wide range of programs and courses to the national and international students.

Person 5

Person 6

Person 7

200.00 x 64.64 in

Touch keyboard

RESULT

3.1 DATA MODEL

Object name	Fields in the object	
parents	**Field label**	**Data type**
	Parent address	Text area
	Parent Name	Text
	Parent Number	Phone
Student	**Field label**	**Data type**
	address	Text Area
	Class	Number
	Mark	
	Phone number	Phone
	marks	Picklist
	Student Name	Text
	School	Master-Detail
Schools	**Field label**	**Data type**
	School Name	Text
	SchoolWebsites	Text Area
	State	
	Phone number	Phone
	Number of students	Roll up summary
	Highmarks	

3.2 ACTIVITY AND SCREENSHOT

Milestone 1-Salesforce

Activity 1:

Creating Developer Account

1. **Go to developers.salesforce.com.**
2. **Click on sign up.**
3. **On the sign up form, enter the details.**
4. **Next Click on sign up after filling the details.**

Activity 2:

Account Activation

1. **Go to the inbox of the email that you used while signing up the page. Click on the verify account to activate your account.**
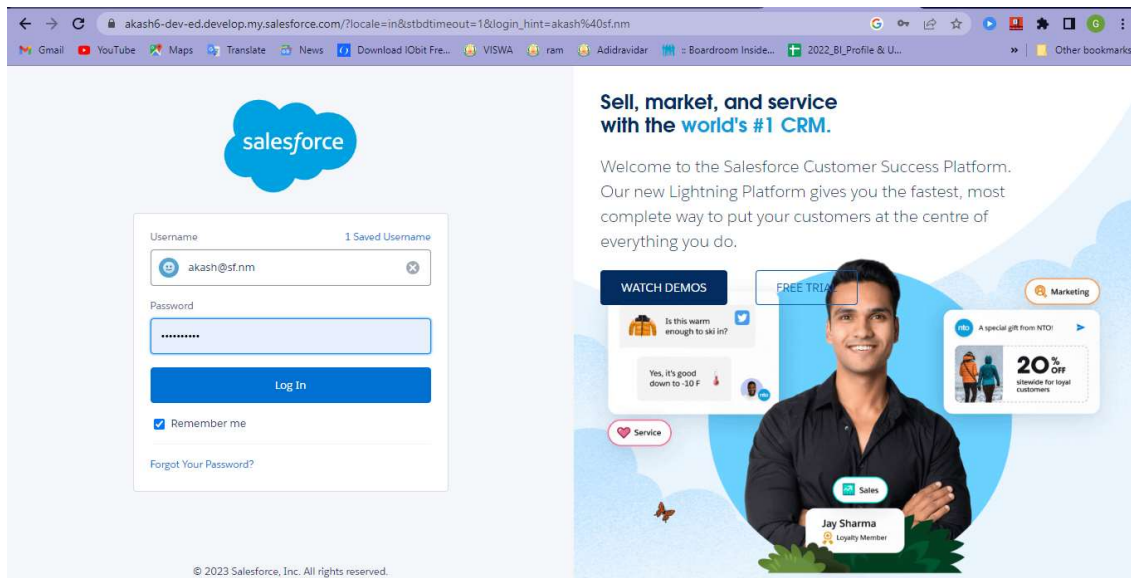
: **Activity-1: Creation of School Object**
Creation of Objects for School Management

For this school management we need to create 3 objects i.e
school,parents and students.
The below steps will assist you in creating those objects.
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will
find a Create Dropdown
click on that and select Custom Object.
● On the Custom Object Definition page, create the object as
follows:
● Label: School
● Plural Label: Schools
● Record Name: School Name
● Check the Allow Reports checkbox
● Check the Allow Search checkbox
● Click Save.
Now create a custom tab. Click the Home tab, enter Tabs in Quick
Find and select Tabs.
Under Custom Object Tabs, click New.
1. For Object, select School.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.
In the same way create other objects such as students and parents.
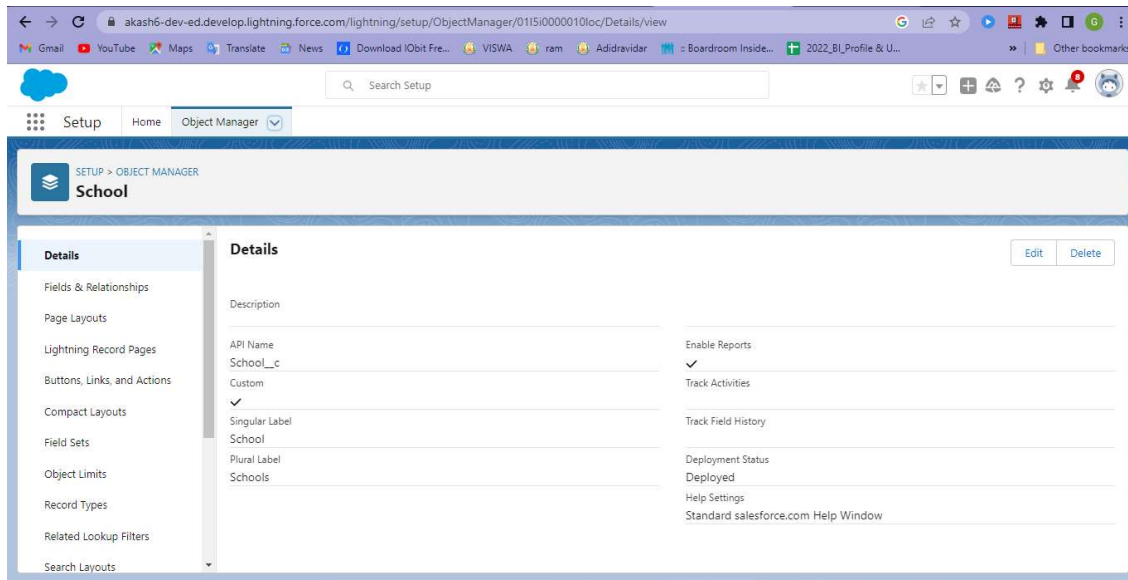
Activity 2: Create student object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.
● On the Custom Object Definition page, create the object as follows:
● Label: Students
● Plural Label: Students
● Record Name: Student Name
● Check the Allow Reports checkbox
● Check the Allow Search checkbox
● Click Save.
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
Under Custom Object Tabs, click New.
1. For Object, select Students.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.
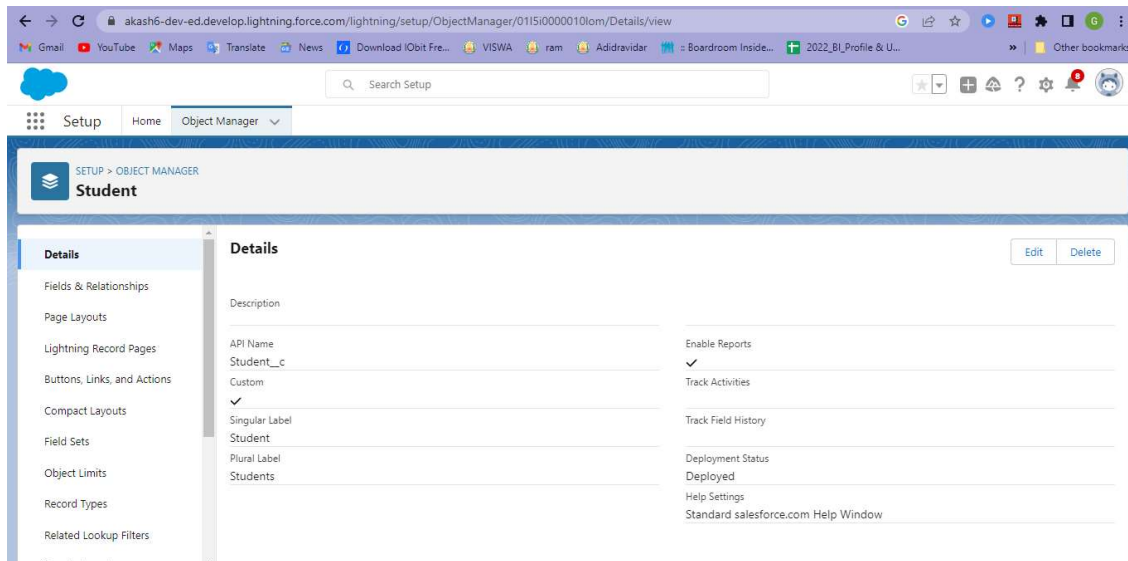
Activity 3: Create parent object

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown
click on that and select Custom Object.

● On the Custom Object Definition page, create the object as follows:

● Label: Parent

● Plural Label: Parents

● Record Name: Parent Name

● Check the Allow Reports checkbox

● Check the Allow Search checkbox

● Click Save.

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.

1. For Object, select Parents.

2. For Tab Style, select any icon.

3. Leave all defaults as is. Click Next, Next, and Save.
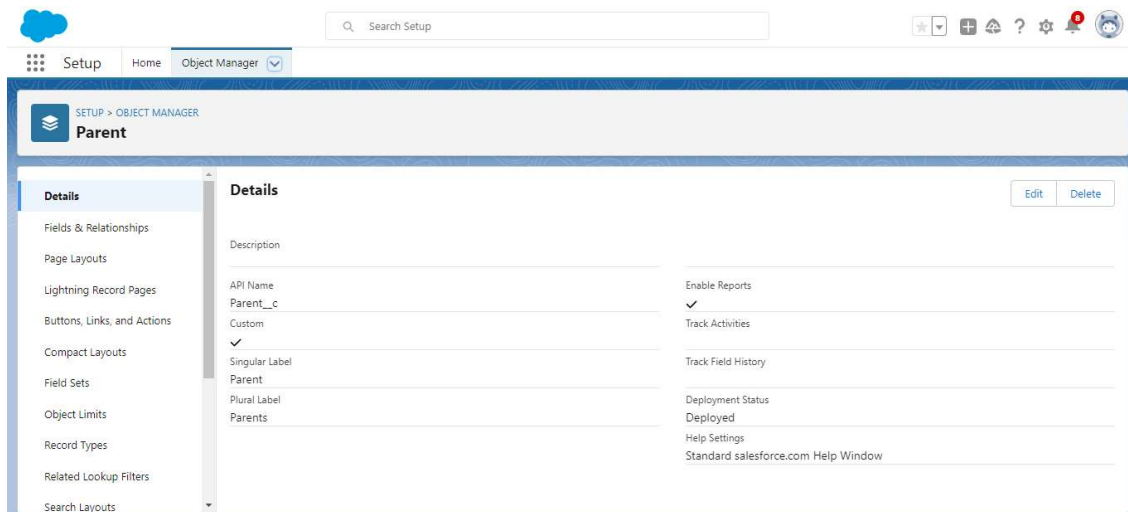
Milestone-3:Lightning App

Activity:
Create the School Management app

● From Setup, enter App Manager in the Quick Find and select App Manager.
● Click New Lightning App. Enter School Management as the App Name, then click Next
● Under App Options, leave the default selections and click Next.
● Under Utility Items, leave as is and click Next.
● From Available Items, select Schools,Students,Parents, Reports, and Dashboards and
move them to Selected Items. Click Next.
● From Available Profiles, select System Administrator and move it to Selected Profiles.
Click Save & Finish.
● To verify your changes, click the App Launcher, type School Management and select the
School Management app.
Note:
1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.

3. Navigation menu-Displays the tabs available inside the app.

Milestone -4:Fields and Relationship

Activity-1:
Creation of fields for the School objects:

1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select School.
4. Select Fields & Relationships from the left navigation, and click New
Now we're ready to make a custom field. Let's do this!
1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Address.
3. Click Next, Next, then Save & New.
4. Follow steps 1 through 3 and create two more text areas with District,State and School
websites as the field labels.
Now let's create the other fields and we must choose the data types of the fields carefully .Let's
have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type
.
Lets see this
1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New.
Lets create Roll-up summary fields to calculate the number of students
1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Number of students
5. Click Next
6. Then select the master object summarized as students and then select count as roll-up and
then click Next,Next and save.
1. From Setup, click Object Manager and select School.
2. Click Fields & Relationships, then New.
3. Select the Roll-up summary field as data type
4. Enter the field label as Highest Marks
5. Click Next
6. Then select the master object summarized as students and then select Max as roll-up and
then select Marks as field to aggregate.click Next,Next and save.
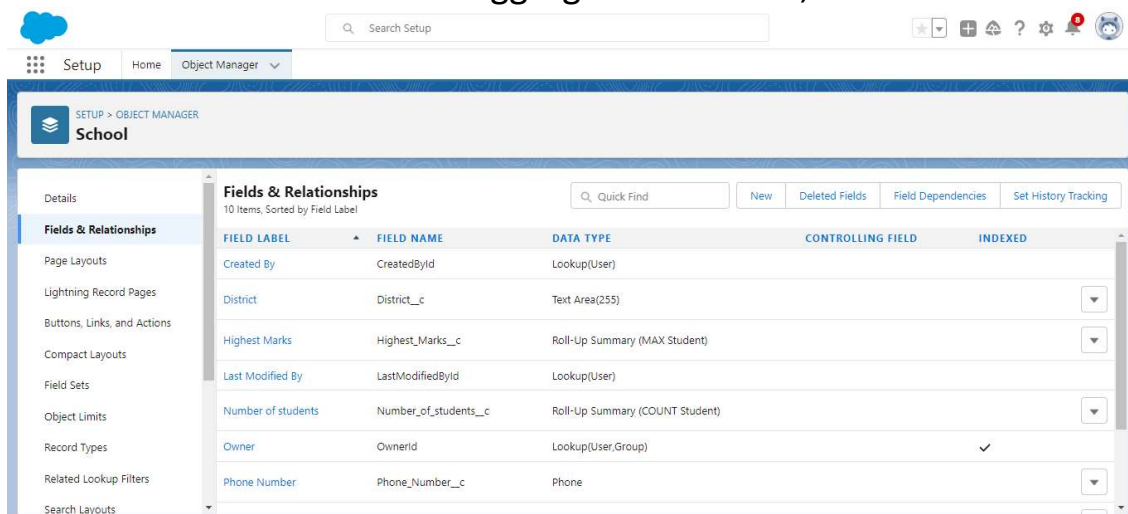
Activity-2:
Creation of fields for the Student objects:

1. Select the Phone as the Data Type, then click Next.
2. For Field Label, enter Phone Number.
3. Click Next, Next, then Save & New
Let's create a master-detail relationship with school object
1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter School.
3. Click Next.
4. For Field Label, enter School.
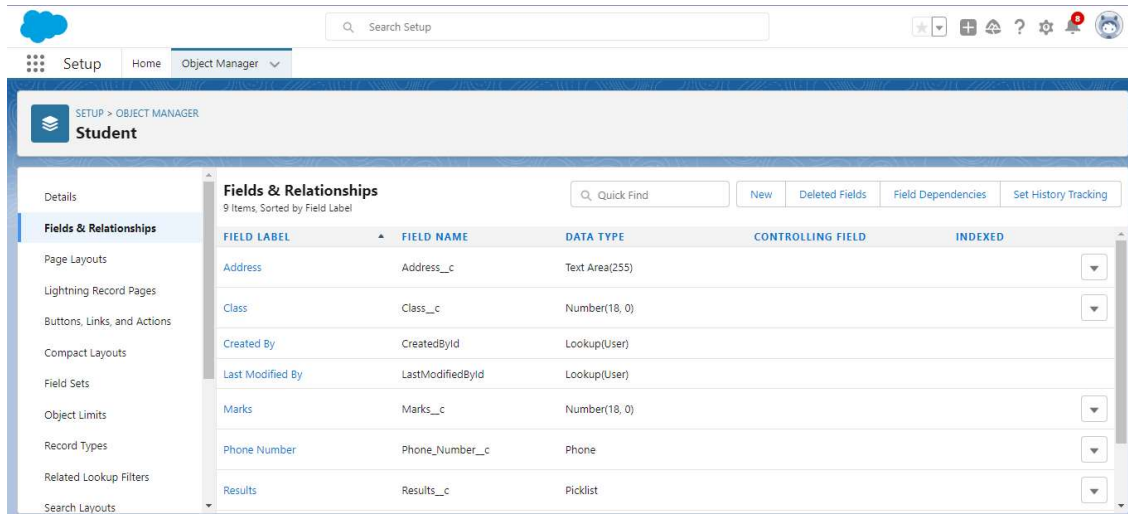5. Click Next, Next, Next and Save.
Lets create a Pick-List field:
1. From Setup, click Object Manager and select Student.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Results.
5. Select Enter values, with each value separated by a new line and enter these values:
6. Pass
7. Fail
8. Click Next, Next, then Save & New
Lets create a Number field:
1. Select the Number as the Data Type, then click Next.

2. For Field Label, enter Class.

3. Click Next, Next, then Save & New

4. Follow steps 1 through 3 and create one more number field with Marks as the field labels.

Activity-3:
Creation of fields for the Parent objects:

1. Select the Text Area as the Data Type, then click Next.

2. For Field Label, enter Parent Address.

3. Click Next, Next, then Save & New.

4. Select the Phone as the Data Type, then click Next.

5. For Field Label, enter Parent Number.

6. Click Next, Next, then Save & New
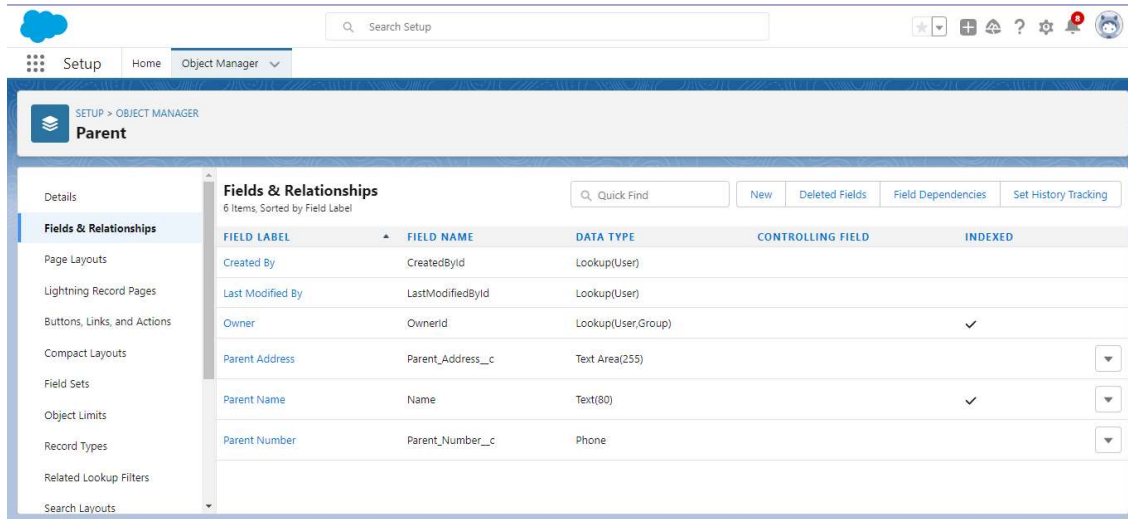
<mark>Milestone-5: Profile</mark>

Activity:
Creation on profile:

From Setup enter Profiles in the Quick Find box, and select Profiles.
1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter School profile.
4. Click **Save**.
5. While still on the School profile page, then click **Edit**.
6. Scroll down to Custom Object Permissions and Give view all access permissions and
assign to the parent profile
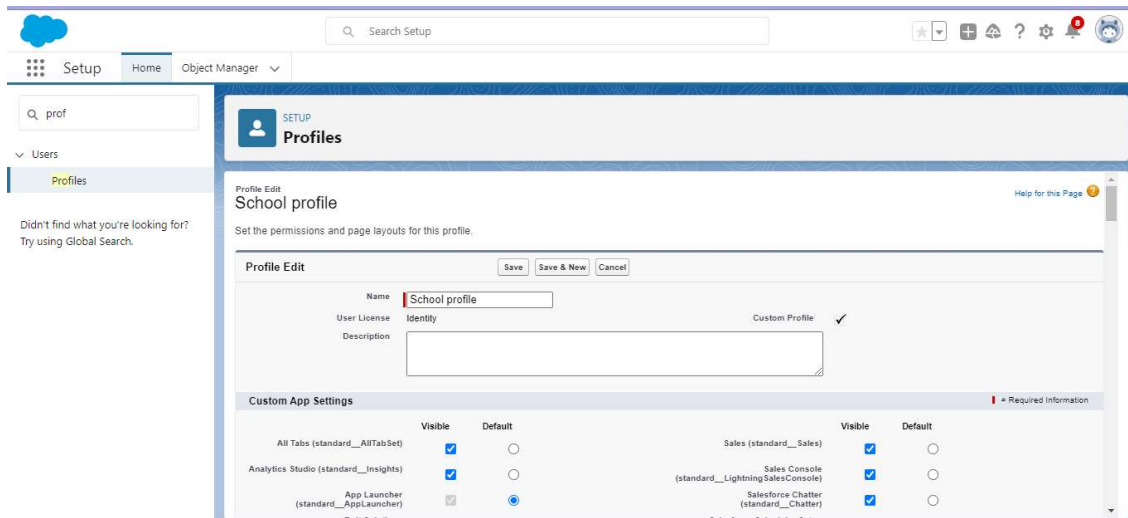
<mark>Milestone-6: Users</mark>

Activity:
Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Parents and (Your) email address and a unique username in the
form of an email address. By default, the username is the same as the email address.
4. Select a User License As salesforce.
5. Select a profile as a School profile.
6. Check Generate new password and notify the user immediately to have the user's login
name and a temporary password emailed to your email.
7. Similarly follow the above steps and create 3 users as Teachers and principals.
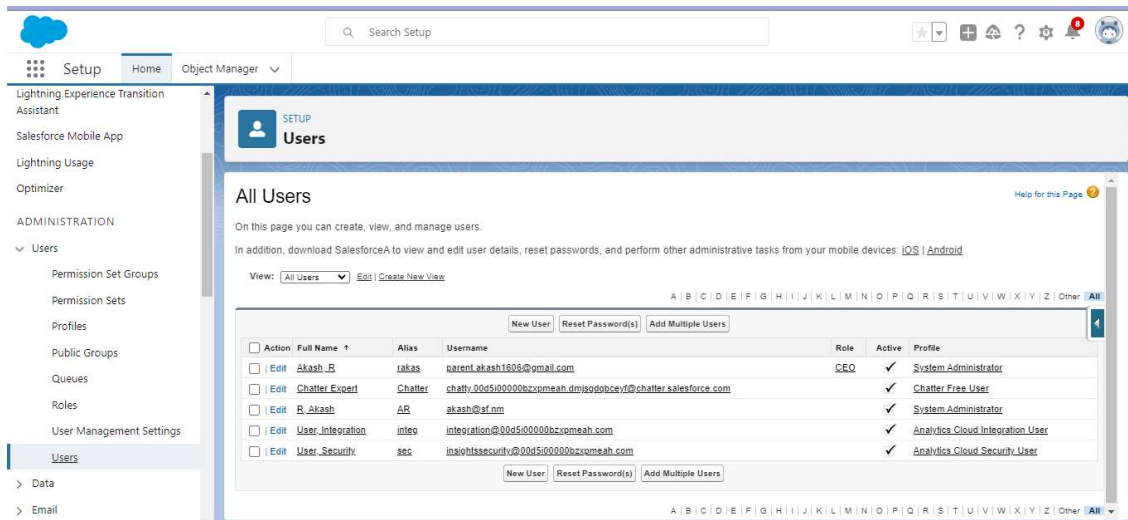
Milestone-7:Permission sets

Activity-1:
Permission sets 1:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. GIve the name of the Permission set name as teacher permission and then under the
object settings give the view create and edit permissions to all custom objects and assign
to the teacher user
Similarly follow the above steps for the permission set 2.

Activity-2:
Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. GIve the name of the Permission set name as Principal permission and then under the
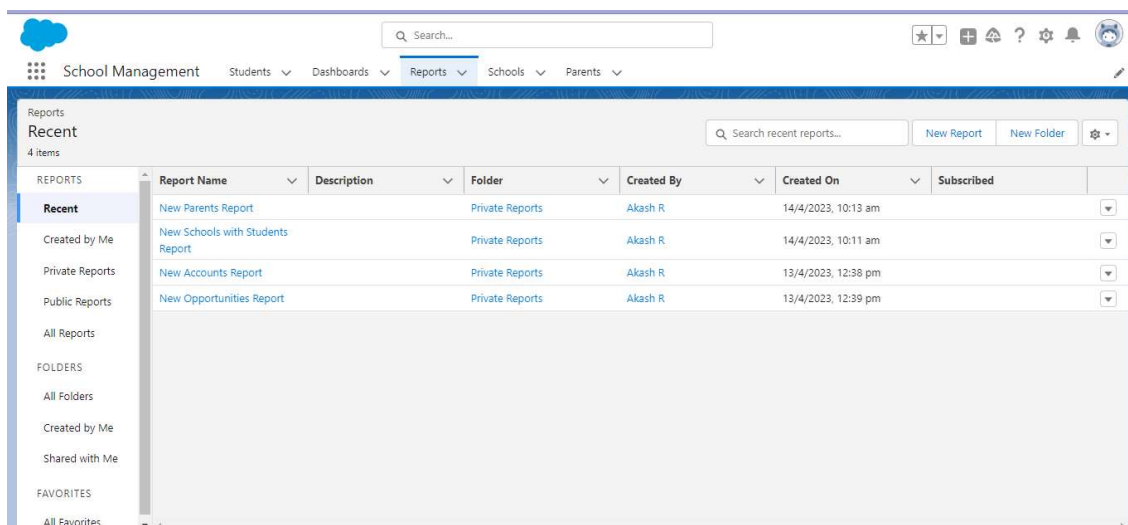
object settings give all permissions for the custom objects and assign them to the
Principal user.
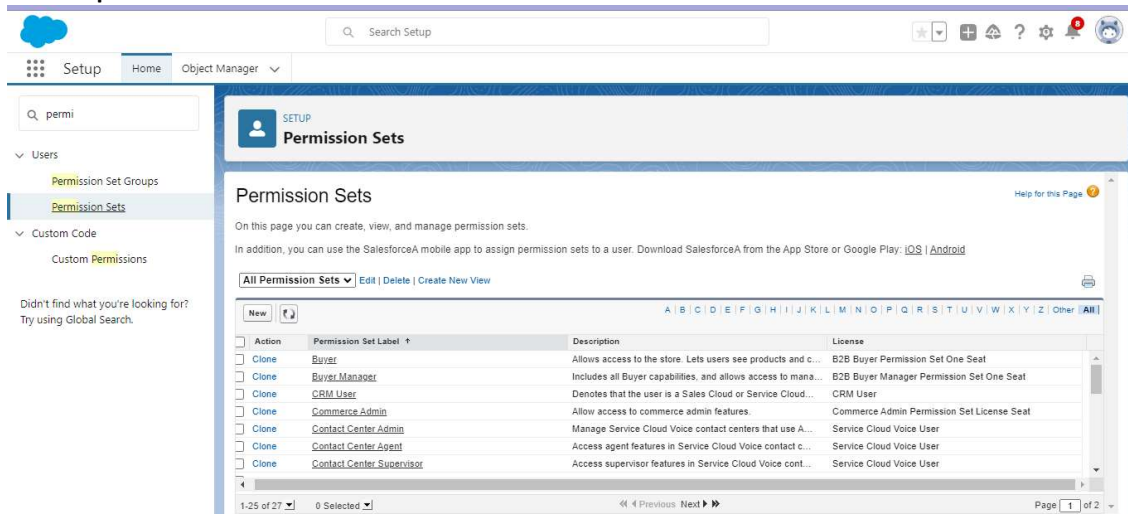
Milestone-8:Reports

Activity:
Reports :

1. From the Reports tab, click New Report.
2. Select the report type as School with students and parents for the report, and click Create.
3. Customize your report, then save or run it.

Team lead   - https://trailblazer.me/id/bsenthilkumar3

Team Member 1 - https://trailblazer.me/id/akasr19

Team Member 2 - https://trailblazer.me/id/bharath25m

Team Member 3 – https://trailblazer.me/id/ekavi3

ADVANTAGES AND DISADVANTAGES:

ADVANTAGES-

* It allows for more effective sales and marketing.
* It can speed up the sales conversion process.
* It increases staff productivity, lowers time costs and boosts morale.
* It enables widely dispersed teams to work closely.
* Can improve customer loyalty through exceptional experience.

DISADVANTAGES-

*Staff over-reliance on CRM may diminish customer loyalty through a bad experience.
*Security concerns associated with centralised data.
*The excess initial time and productivity cost of implementation.
*It requires a process-driven sales organisation.
*It may not suit every business.

APPLICATIONS

*Inquiry capture

*Lead nurturing

*Applicant tracking and management

*Lead scoring based on predefined parameters

*Advanced Reporting

*Publisher platform integrations

CONCLUSION:

Customer relationship management (CRM) can play a remarkable role in optimizing relationbased operations in organizations. Successful implementation of CRM involves satisfying customers' needs which consequently results in building, managing and retaining effective and long-term relationships with the customers.

FUTURE

Since application of CRM in the area of higher education and particularly, as a tool for educational marketing activities, is a trailblazing concept that has not been scrutinized by many scholars, the scope is very new and untouched. Reviewing all the references and 62 citations used in this research which are all within the twentieth and twenty first centuries can prove the novelty and freshness of this area. Thus, there is a broad area to be explored for scholars and professionals interested in topics like "relationship management in higher education", "application of CRM in educational marketing of universities", etc. In addition, as another area of further research, the authors suggest a pilot implementation of the proposed framework after a series of complementary studies.