

PROJECT REPORT TEMPLATE

INTRODUCTION : -

1.1 Overview

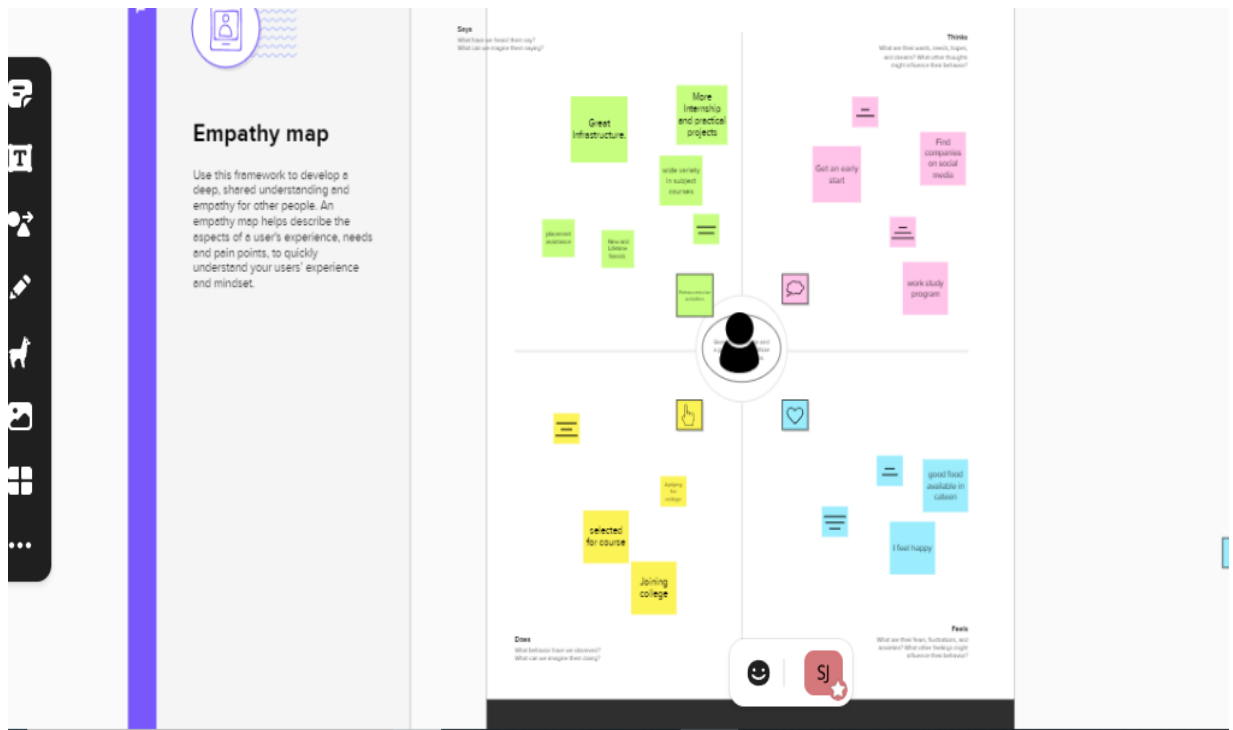
Schools are facing more competition than ever before, and they need to find innovative ways to attract and retain students. One solution that many schools are turning to is schools CRM software. This technology helps schools manage their relationship with students and parents, and it can be a powerful tool for increasing admission. In this blog, we'll explore what is CRM software for Schools, how it works, and how it works, and how it can help in boosting enrollment and improving engagement.

1.2 Purpose

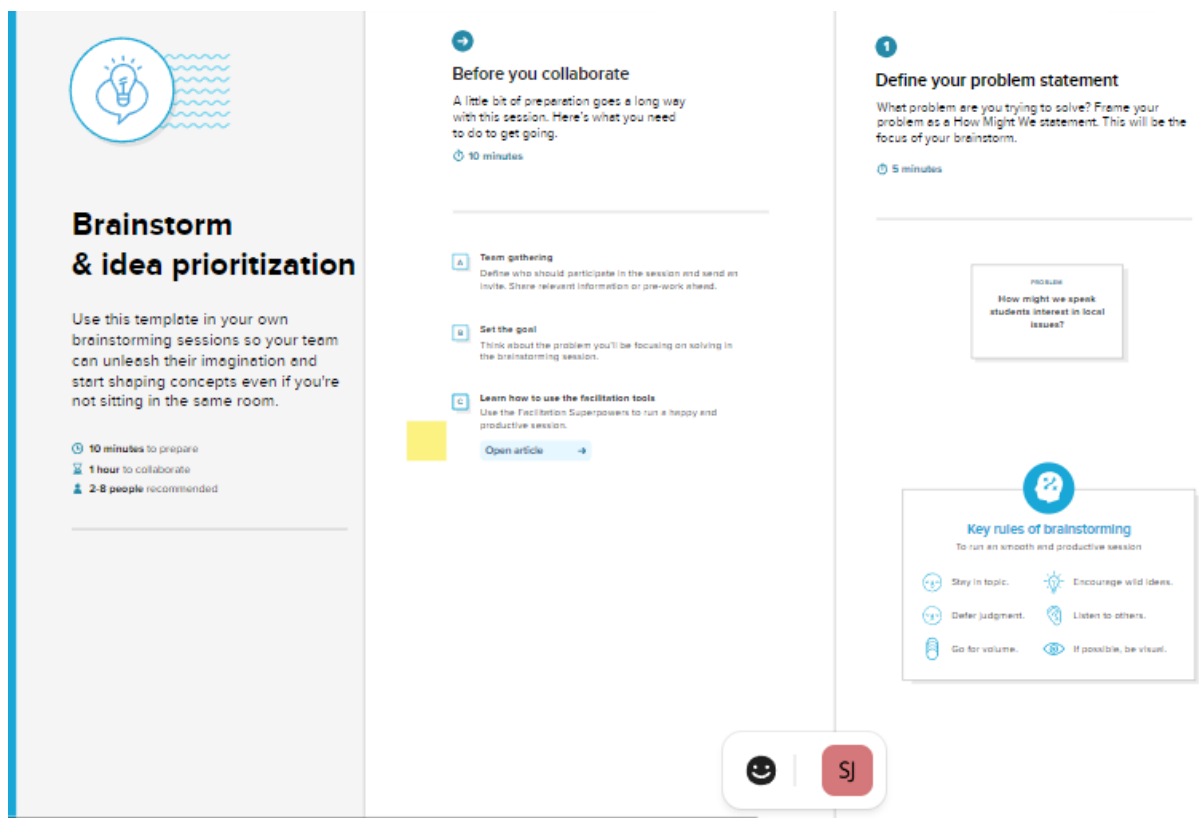
A School CRM (Customer Relationship Management), software is a specialized tool designed to manage and track student interactions, data, and automate tasks related to student recruitment, enrollment, and retention. This type of software is aimed at simplifying and streamlining the enrollment and retention process and provides valuable insights into students behaviour and preferences, which can help schools and preschool to make data-driven decisions.

2. Problem Definition and Design thinking : -

2.1. Empathy Map



2.2 Ideation and Brainstorming map Screenshot:



2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Person 1

Increase field team productivity	Increase data security	Increase efficiency of making right decisions
Increase efficiency		

Person 2

Increase sales leads	Marketing create new products	Security management
Contact information and details		

Person 3

Improve funding	Automated error management	Improved conversion rates
customer selection		

Person 4

work from anywhere	scale your business	set goals and track
full customer view		

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a penname/nickname. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller subgroups.

⌚ 20 minutes

Games & competitions



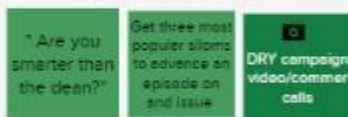
TIP

Don't underestimate how quickly notes can make it easier to make notes, become organized and categorize important ideas as distinct within your work.

Wild card

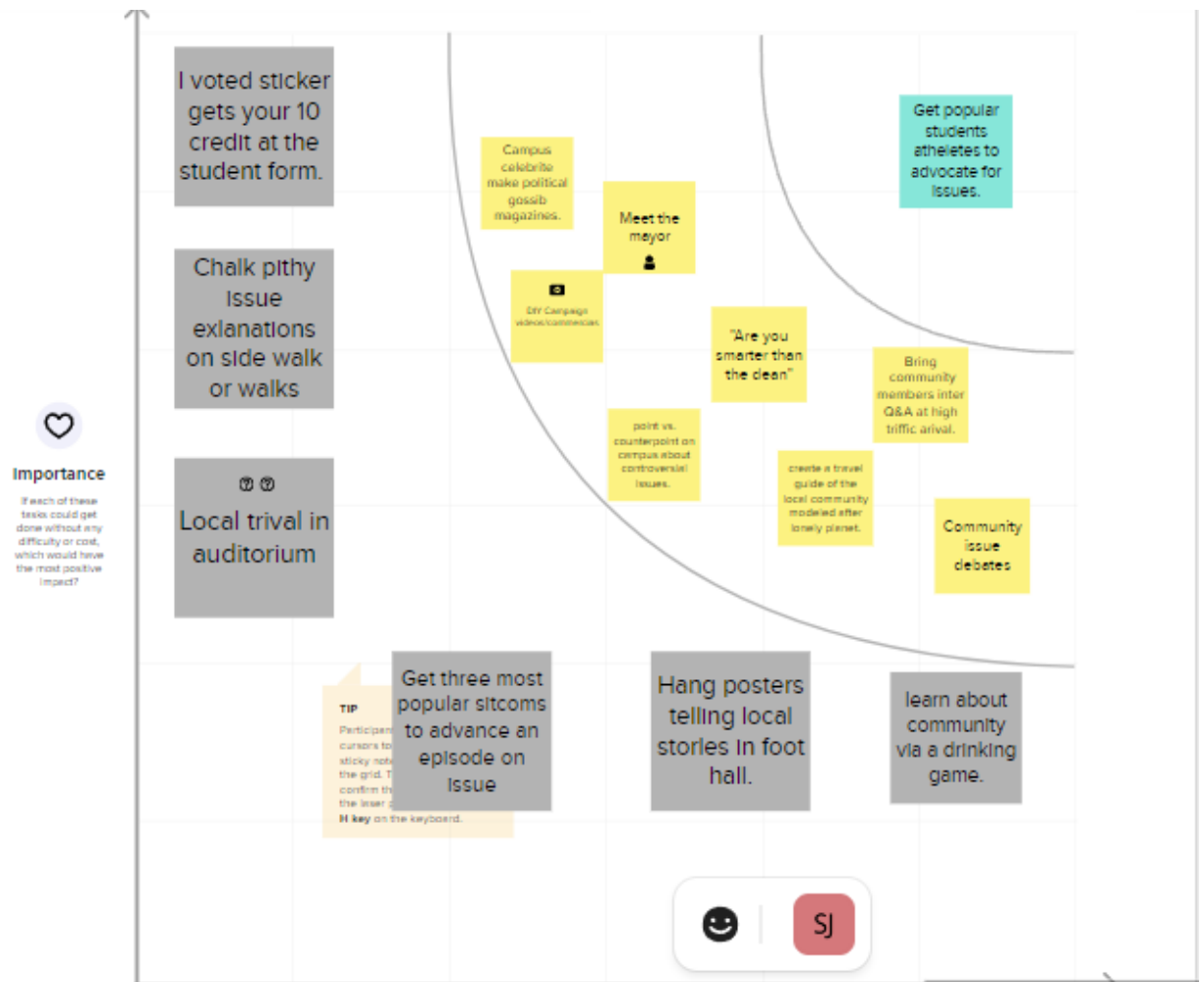


Shows & Videos



Celebrities & Superstars





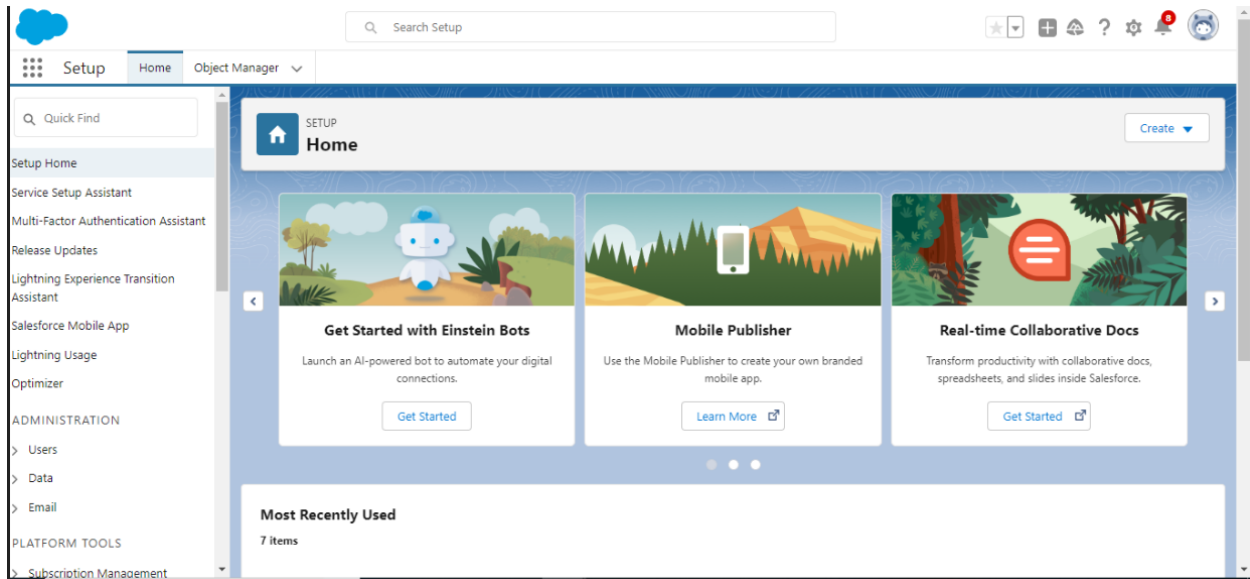
3. RESULT:-

3.1 Data Model:

Object name	Fields in the Object
Object-1	Field Label: phone number Data Type:Phone
Object -2	Field Label:Schools Data Type:Picklist
Object-3	Field Label:Parent address Data Type: Text

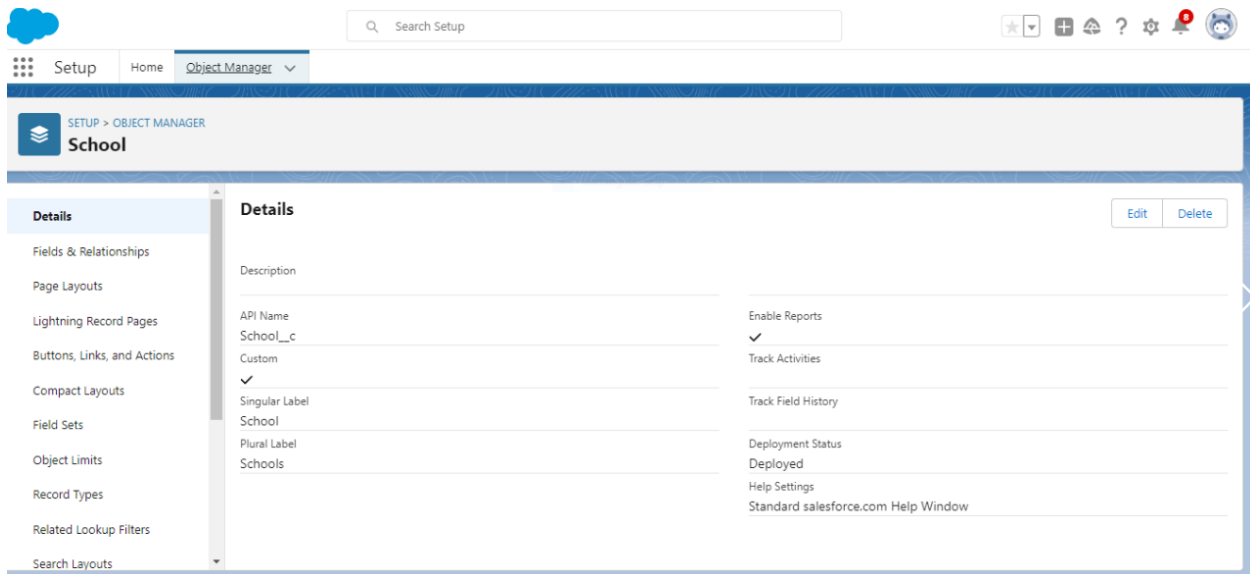
3.2 Activity and screenshots:-

Create salesforce Org-creating Developer Account



Object:

Creation of School object



Creation of Student Object

The screenshot shows the Salesforce Object Manager interface for the 'Students' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is selected, showing the following configuration:

Field	Value
Description	
API Name	Students__c
Custom	✓
Singular Label	Students
Plural Label	Students
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Creation of Parent Object

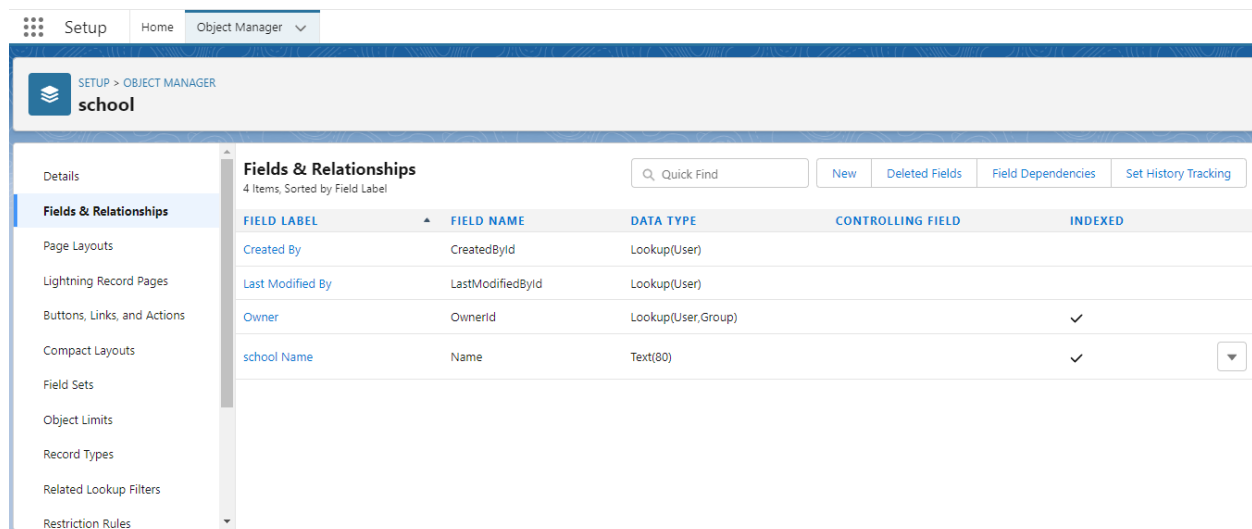
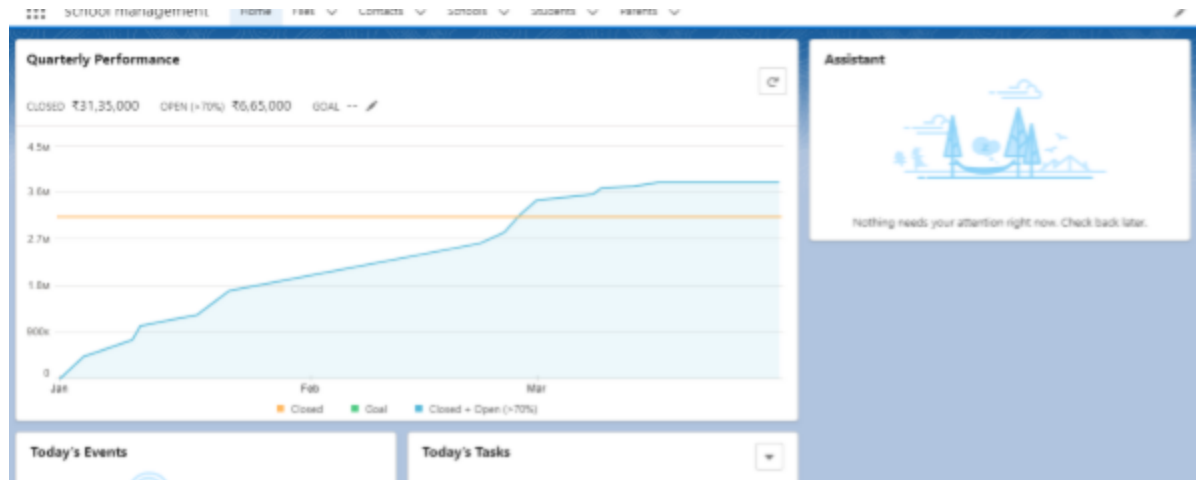
The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is selected, showing the following configuration:

Field	Value
Description	
API Name	Parent__c
Custom	✓
Singular Label	Parent
Plural Label	Parents
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

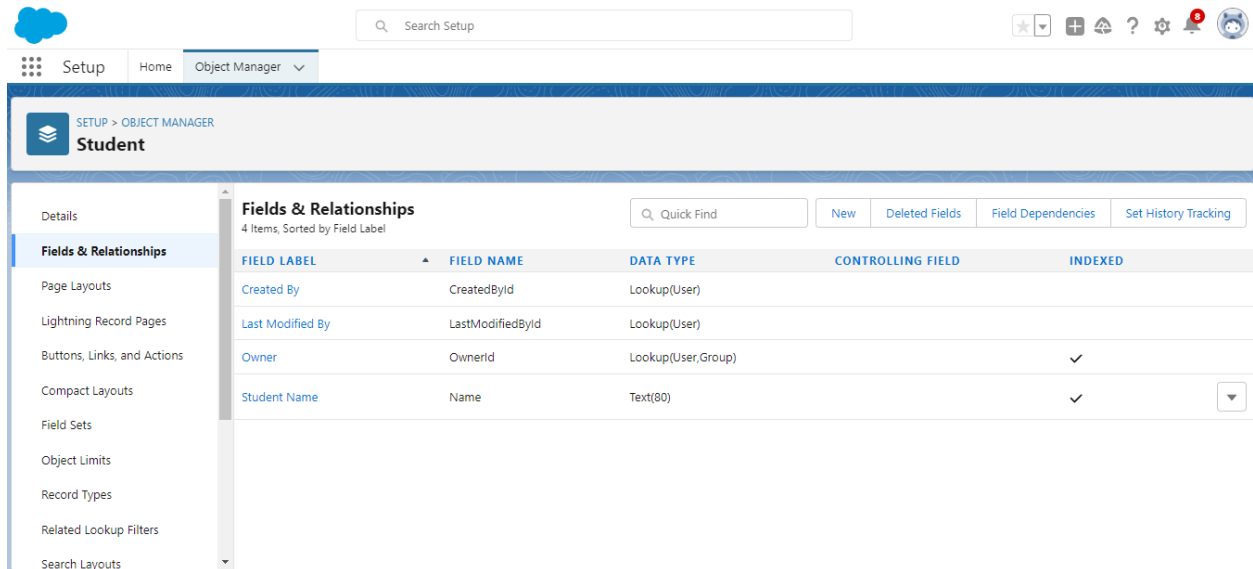
Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Lighting App

Create the school Management App



Creation of Fields for the Student Objects

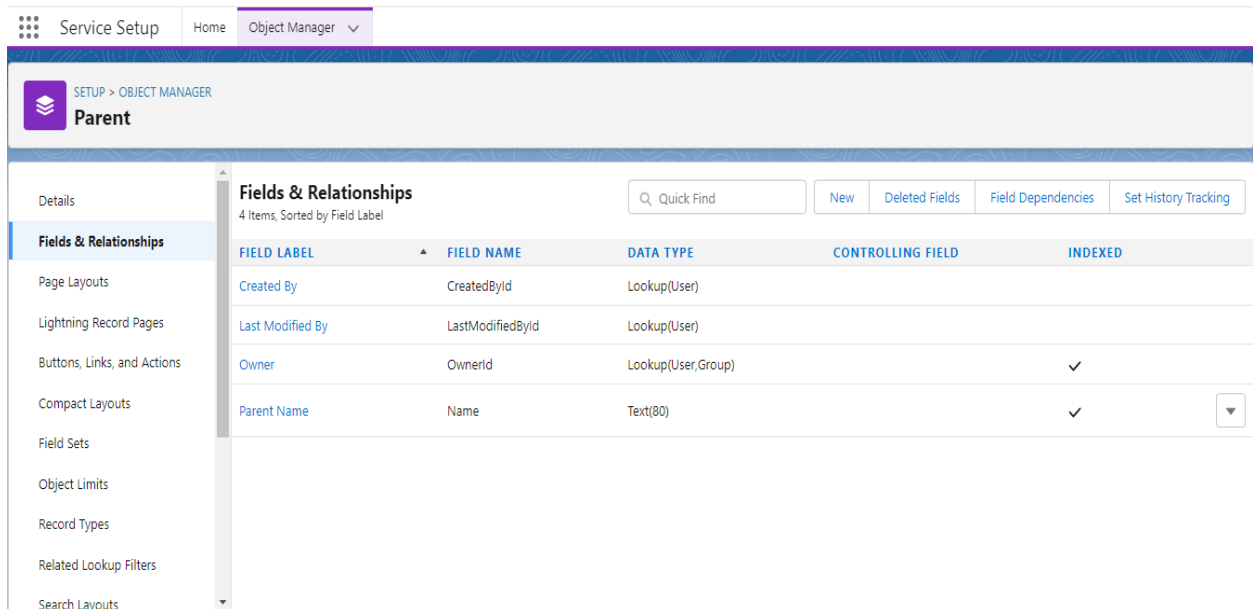


The screenshot shows the Salesforce Setup interface for the 'Student' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table lists the following fields:

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)		✓
Student Name	Name	Text(80)		✓

Buttons at the top right of the table include: New, Deleted Fields, Field Dependencies, and Set History Tracking.

Creation of Fields for The Parent Object



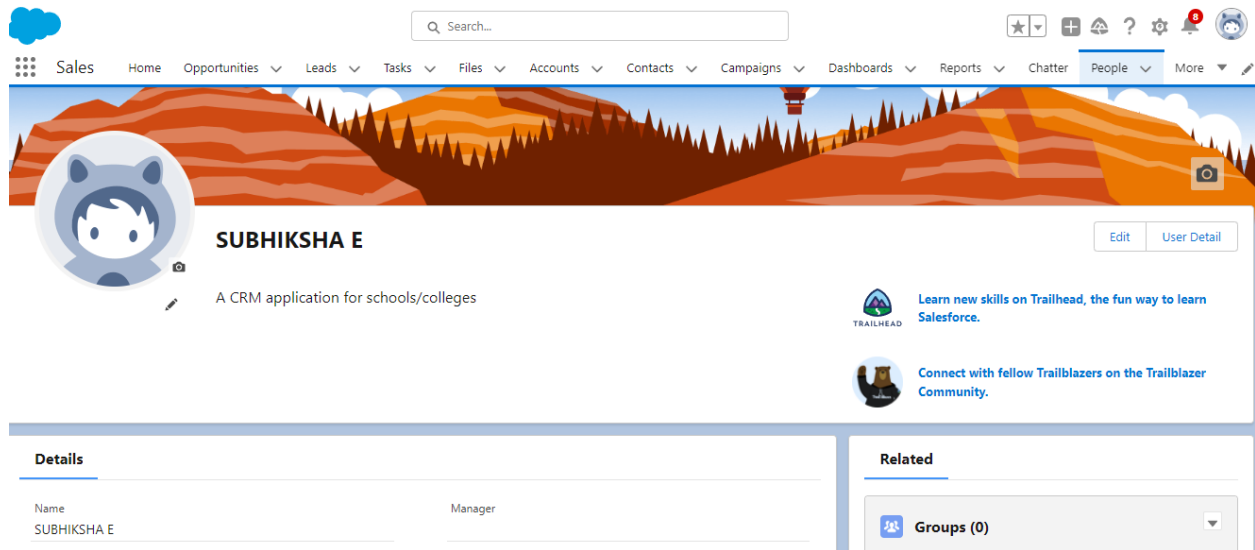
The screenshot shows the Salesforce Setup interface for the 'Parent' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table lists the following fields:

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 Name	Name	Text(80)		✓

Buttons at the top right of the table include: New, Deleted Fields, Field Dependencies, and Set History Tracking.

Profile

Creation On Profile



The image shows a Salesforce profile page for a user named SUBHIKSHA E. The page features a header with a search bar and navigation tabs. The profile card includes a profile picture of a blue cat, the name SUBHIKSHA E, and a bio: "A CRM application for schools/colleges". There are buttons for "Edit" and "User Detail". Below the profile card, there are sections for "Details" and "Related". The "Details" section shows the user's name and manager. The "Related" section shows "Groups (0)".

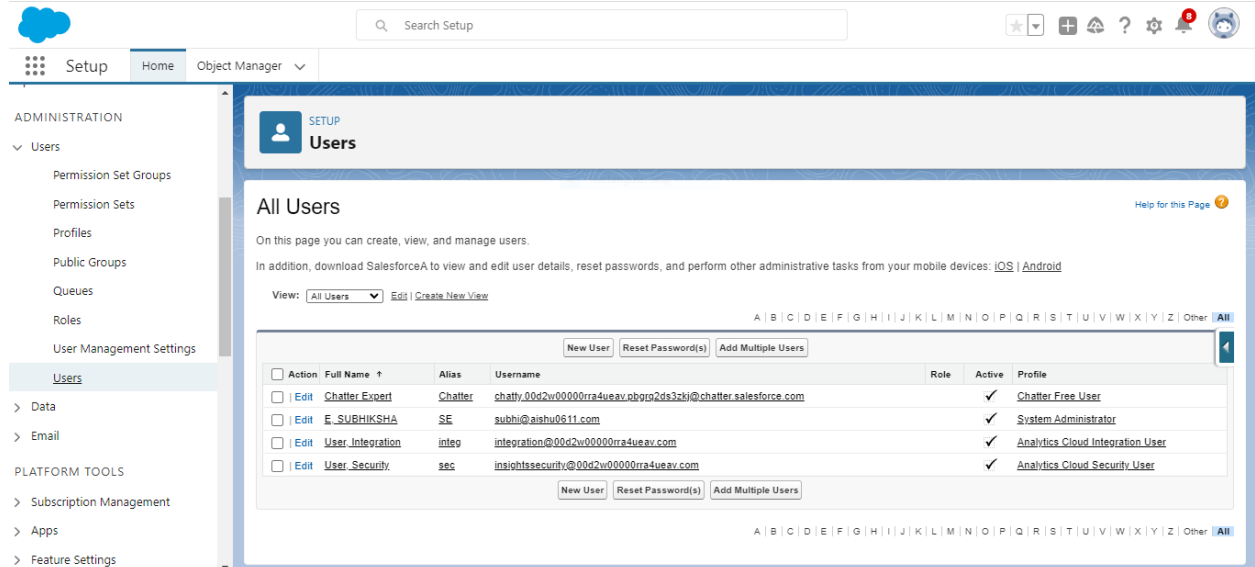
Header: Search bar, navigation tabs (Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, People, More).

Profile Card: Profile picture (blue cat), Name: SUBHIKSHA E, Bio: A CRM application for schools/colleges, Buttons: Edit, User Detail.

Details Section: Name: SUBHIKSHA E, Manager: [blank].

Related Section: Groups (0).

Users



The image shows the Salesforce Users Management page. The left sidebar contains navigation links for Administration (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings) and Platform Tools (Data, Email, Subscription Management, Apps, Feature Settings). The main content area is titled "All Users" and includes a search bar, a "View" dropdown, and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. There are buttons for "New User", "Reset Password(s)", and "Add Multiple Users" at the top and bottom of the table.

Header: Search Setup, navigation tabs (Setup, Home, Object Manager).

Left Sidebar: ADMINISTRATION (Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), PLATFORM TOOLS (Data, Email, Subscription Management, Apps, Feature Settings).

Main Content Area: SETUP Users, All Users, Help for this Page, On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#). View: All Users, Edit | Create New View.

User Table:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d2w00000ra4ueavnbjrp2ds3zsj@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	E SUBHIKSHA	SE	subhi@alishu0611.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000ra4ueav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w00000ra4ueav.com		✓	Analytics Cloud Security User

Buttons: New User, Reset Password(s), Add Multiple Users.

Permission Sets

Permission 1

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'per' and a navigation menu with categories like Users, Feature Settings, Sales, and Accounts. The main content area is titled 'Permission Sets' and displays details for the 'teachers permission' set. The 'Permission Set Overview' section includes fields for Description, License, Session Activation Required, Last Modified By (SUBHIKSHA E, 12/04/2023, 2:32 pm), API Name (teachers_permission), Namespace Prefix, Created By (SUBHIKSHA E, 12/04/2023, 2:32 pm), and a checkbox for Session Activation Required. Below this is the 'Apps' section, which includes links for Assigned Apps, Assigned Connected Apps, Object Settings, and App Permissions.

Permission Set
teachers permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	teachers_permission
License	Namespace Prefix	
Session Activation Required	Created By	SUBHIKSHA E, 12/04/2023, 2:32 pm
Last Modified By	SUBHIKSHA E, 12/04/2023, 2:32 pm	

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Permission 2

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'pe' and a navigation menu with categories like Users, Email, Apps, and Feature Settings. The main content area is titled 'Permission Sets' and displays details for the 'principal permission' set. The 'Permission Set Overview' section includes fields for Description, License, Session Activation Required, Last Modified By (SUBHIKSHA E, 12/04/2023, 2:37 pm), API Name (principal_permission), Namespace Prefix, Created By (SUBHIKSHA E, 12/04/2023, 2:37 pm), and a checkbox for Session Activation Required. Below this is the 'Apps' section, which includes links for Assigned Apps, Assigned Connected Apps, Object Settings, and App Permissions.

Permission Set
principal permission

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	principal_permission
License	Namespace Prefix	
Session Activation Required	Created By	SUBHIKSHA E, 12/04/2023, 2:37 pm
Last Modified By	SUBHIKSHA E, 12/04/2023, 2:37 pm	

Apps

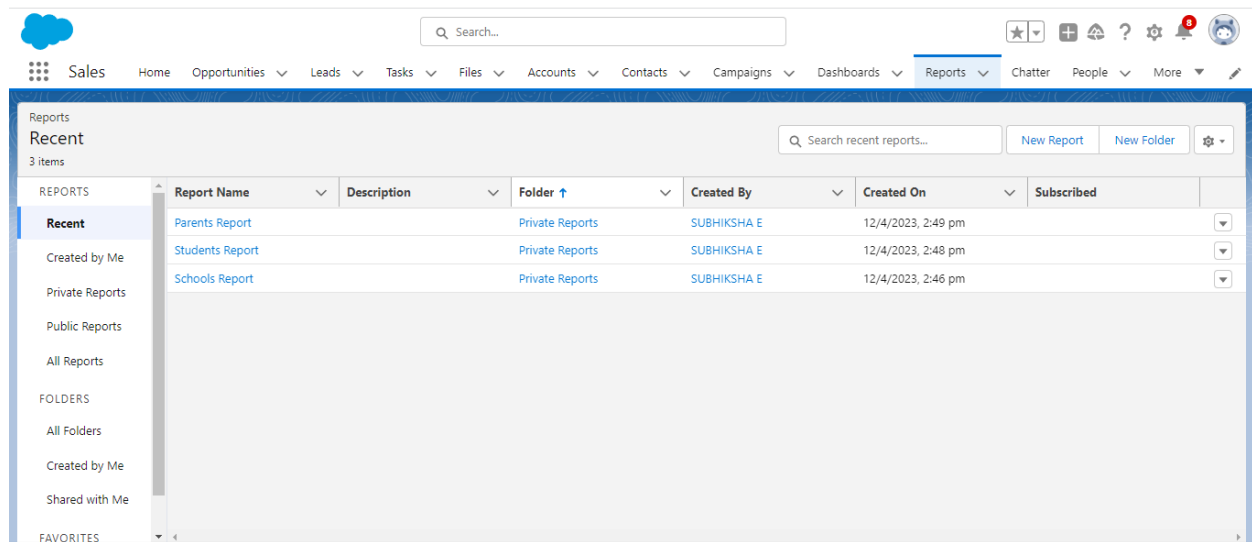
Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Reports



The screenshot displays the Salesforce Reports page. At the top, there is a navigation bar with various tabs including Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, People, and More. Below the navigation bar, the Reports section is active, showing a 'Recent' view with 3 items. A search bar for 'Search recent reports...' is present. The main table lists reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The left sidebar contains filters for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders (All Folders, Created by Me, Shared with Me).

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Parents Report		Private Reports	SUBHIKSHA E	12/4/2023, 2:49 pm	
Created by Me	Students Report		Private Reports	SUBHIKSHA E	12/4/2023, 2:48 pm	
Private Reports	Schools Report		Private Reports	SUBHIKSHA E	12/4/2023, 2:46 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

4.Trailhead Profile public URL

Team Lead- <https://trailblazer.me/id/subes2>

Team member 1-<https://trailblazer.me/id/sjeevaraj>

Team member 2-<https://trailblazer.me/id/sgeethageetha>

Team member 3-<https://trailblazer.me/id/sowmi3116>

5.ADVANTAGES & DISADVANTAGES:

As You switch to using a CRM software solution for schools, many benefits come along. Not only does it enhance your efficiency on the performance end but also enables you to foster your relationships with existing and potential students/parents. Here are some of the common benefits:

- 1. Increased Efficiency:** School CRM software automates many of the manual process involved in student and parent communication, data management, and reporting. This can save schools time and resources, allowing them to focus on other important tasks. By having all relevant information in one place, staff can access student and parent data quickly and easily, reducing the need for manual data entry and improving accuracy.
- 2. Better Student Engagement:** It enables schools to track interactions with students and their parents, and provides a platform for personalized communication, this can help schools build stronger relationships with students, increase engagement, and provide a better overall experience. Schools can also use the software to send targeted communications and track student progress, helping to identify any areas of concern and address them promptly.
- 3. Improved Data Insights:** With all data stored in one place, schools can gain valuable insights into student behaviour, preferences, and trends. This information can be used to make informed decisions about admission process, student engagement, and resources allocation. Schools can also use the data to monitor student progress and identify areas for improvement.
- 4. Enhanced Reputation Management:** School CRM software helps schools in managing their reputation by tracking student satisfaction and addressing concerns in a timely manner. By having all relevant information in one place, schools can respond

to student and parent inquiries more efficiently and effectively. This can help schools maintain a positive image and build stronger relationships within the community.

- 5. Increased Admission:** School CRM software can automate many of the tasks involved in student enrollment, allowing schools to reach more prospective students enrollment, allowing schools maintain strong relationships with their alumni and leverage their networks to support their mission.
- 6. Better Alumni Management:** A CRM can helps schools keep in touch with alumni and tap into their networks for fundraising and recruitment. Schools can use the software to track alumni interactions, send targeted communication, and organize events. This can help schools maintain strong relationships with their alumni and leverage their networks to support their mission.

APPLICATION:

- 1. Automated Marketing:** The software can automate marketing tasks such as email campaign, SMS messaging, and social media outreach, allowing schools to reach more prospective students.
- 2. Lead Management:** A CRM can help schools track and manage leads, providing a centralized databases of prospective students. This allows schools to prioritize leads and follow up with them in a timely manner.

- 3. Personalized Communication:** By tracking student interactions and preferences, schools can send personalized communication that are more likely to resonate with prospective students.
- 4. Data Insights:** The software provides valuable insights into students behaviour and preference allowing schools to make informed decisions about their recruitment efforts.
- 5. Improved Outreach Efforts:** With all data in one place, schools can analyse trends and make data-driven decisions about their outreach efforts. This can help schools reach the right students with the right message, increasing the chances at attracting new students.

CONCLUSION:

Overall, school CRM software can help schools streamline the enrollment process, reach more prospective students, and increase admissions. It helps schools and preschools in managing student data and interactions, automate tasks related to recruitment and enrollment, and improve the efficiency of their recruitment and retention efforts. It can also help to increase the effectiveness of Enrollment campaigns. SCHOOL MANAGEMENT CRM APPLICATION enables you to do all this and much more on a unified platform. Schedule a demo today and learn more about a purpose-built growth solution for schools.

FUTURE SCOPE:

Customer Relationship Management is the best means to reach your customers and serve them in the best way. It automates all those tasks which enterprises used to perform manually. Every organization is set up with some frustrated ambitions and targets. The better the performance of your business, the better the relationship with your customers will be. CRM software Development can turn your business into a powerhouse of sales. Thus, CRM software is no, longer essential, in fact mandatory for small and medium business. Now, you can easily access the CRM software virtually from anywhere and anytime. All you need an internet connection to further the scope of doing your business. So, don't be late and perform the necessities for implementing the CRM software in your business.