

1 INTRODUCTION

1.1 Overview

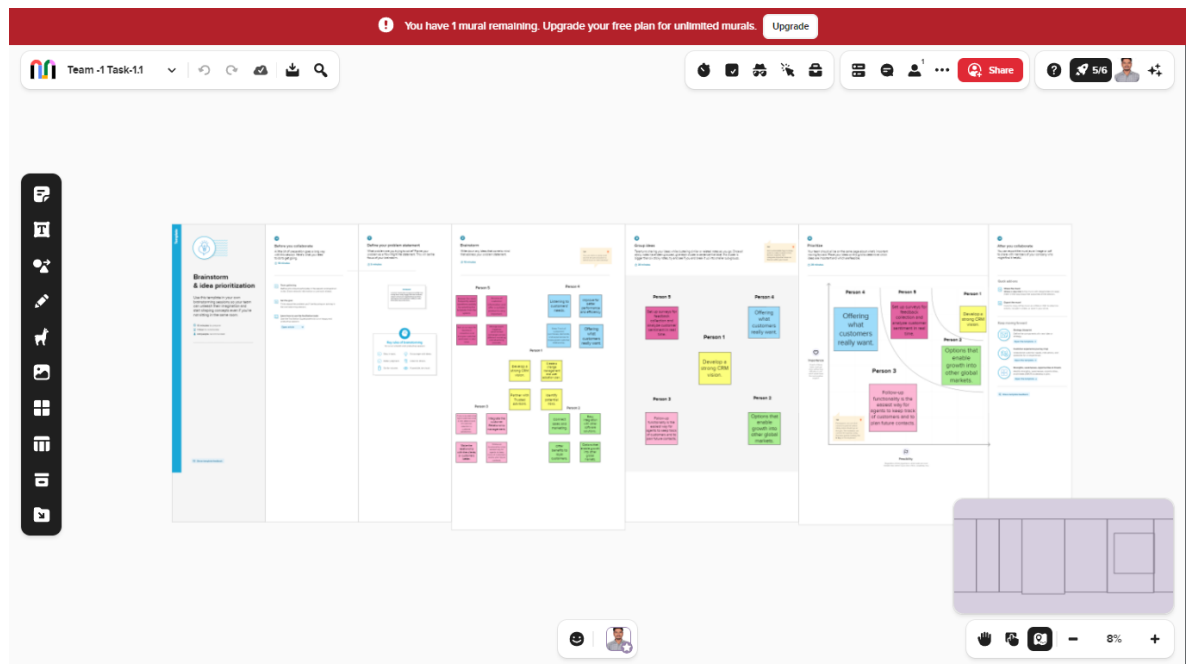
With effective CRM, schools can manage leads, automate communications and review progress a lot more efficiently. Many CRM platforms offer automated marketing tools, allowing users to maintain basic contact with multiple contacts effortlessly. This is great for influencing a prospect's decisions early on, but also particularly useful in dealing with follow-up workloads during the admissions process and automated emailing or text messaging throughout. Automation functions are usually heavily customizable so that they reflect the personality of the user and don't come across as cold or robotic. The lead capture features of school CRM are useful in following the progress of prospective students through their admissions journey and into enrollment, and then maintaining follow-up and post-graduation contact too. All the small but time-consuming prompts and reminders to prospects and students can be automated, saving more time for face-to-face meetings. CRM can keep track of phone calls, emails, and physical meetings and advises users on when and how to push professional or personal relationships to the next stage based on the information it's given and the desired outcome of the relationship. On the scale of a business or institution, CRM offers team management, communication, and workflow tools to help teams work together on scheduling and lead generation. In schools' admissions, this manifests as the ability to easily lead students through their enrollment journey.

1.2 Purpose

We help your marketing, sales, commerce, service and IT teams work as one from anywhere — so you can keep your customers happy everywhere.

A customer relationship management (CRM) solution helps you find new customers, win their business, and keep them happy by organising customer and prospect information in a way that helps you build stronger relationships with them and grow your business faster.

2.1 Empathy Map



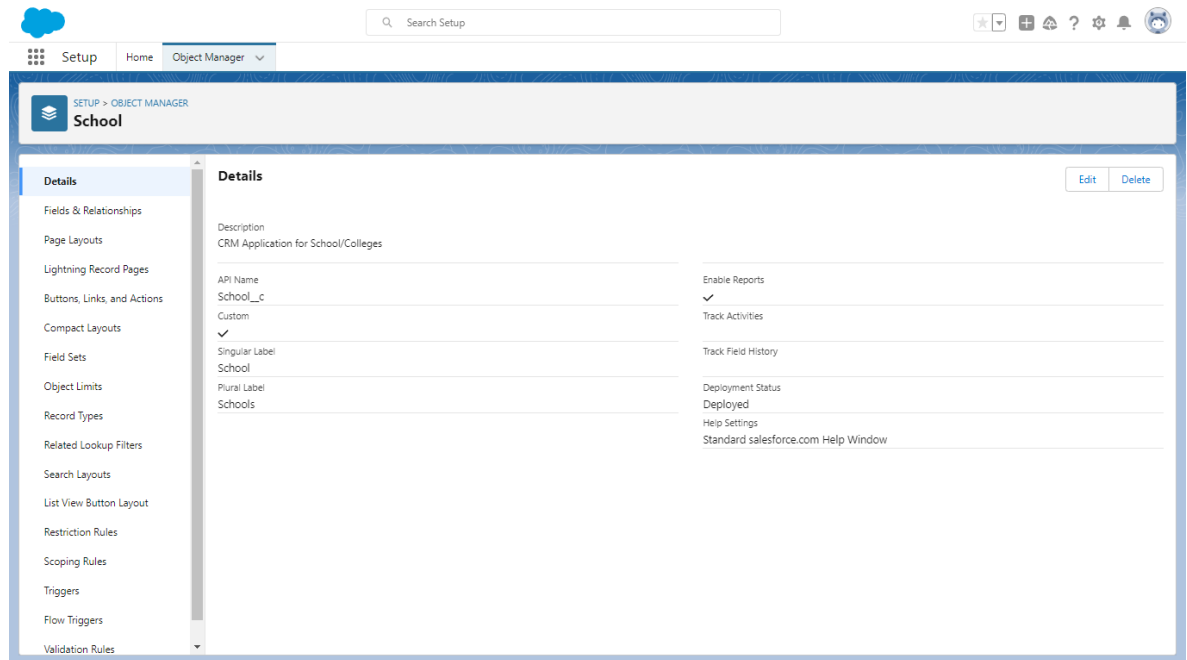
3 RESULT

3.1 Data Model:

Object name	Fields in the Object														
School	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Address</td><td>Area</td></tr> <tr> <td>District</td><td>Area</td></tr> <tr> <td>State</td><td>Area</td></tr> <tr> <td>School</td><td>Area</td></tr> <tr> <td>Number of students</td><td>Roll-Up summary</td></tr> <tr> <td>Highest Marks</td><td>Roll-Up summary</td></tr> </table>	Field label	Data type	Address	Area	District	Area	State	Area	School	Area	Number of students	Roll-Up summary	Highest Marks	Roll-Up summary
Field label	Data type														
Address	Area														
District	Area														
State	Area														
School	Area														
Number of students	Roll-Up summary														
Highest Marks	Roll-Up summary														
Student	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Phone Number</td><td>Phone</td></tr> <tr> <td>School</td><td>Master-Detail Relationship</td></tr> <tr> <td>Results</td><td>Picklist</td></tr> <tr> <td>Class</td><td>Number</td></tr> <tr> <td>Marks</td><td>Number</td></tr> </table>	Field label	Data type	Phone Number	Phone	School	Master-Detail Relationship	Results	Picklist	Class	Number	Marks	Number		
Field label	Data type														
Phone Number	Phone														
School	Master-Detail Relationship														
Results	Picklist														
Class	Number														
Marks	Number														
Parent	<table> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Parents Address</td><td>Area</td></tr> <tr> <td>Parents Number</td><td>Phone</td></tr> </table>	Field label	Data type	Parents Address	Area	Parents Number	Phone								
Field label	Data type														
Parents Address	Area														
Parents Number	Phone														

3.2 Activity & Screenshot

School Object Activity



Details

Description
CRM Application for School/Colleges

API Name
School__c

Custom
✓

Singular Label
School

Plural Label
Schools

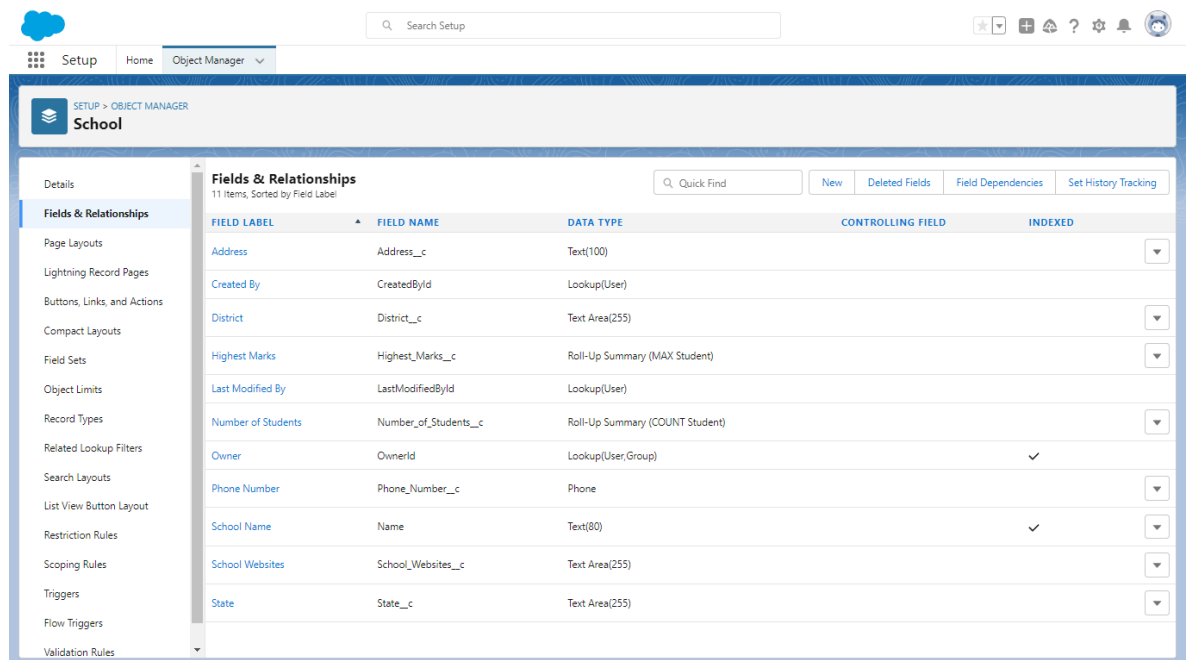
Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

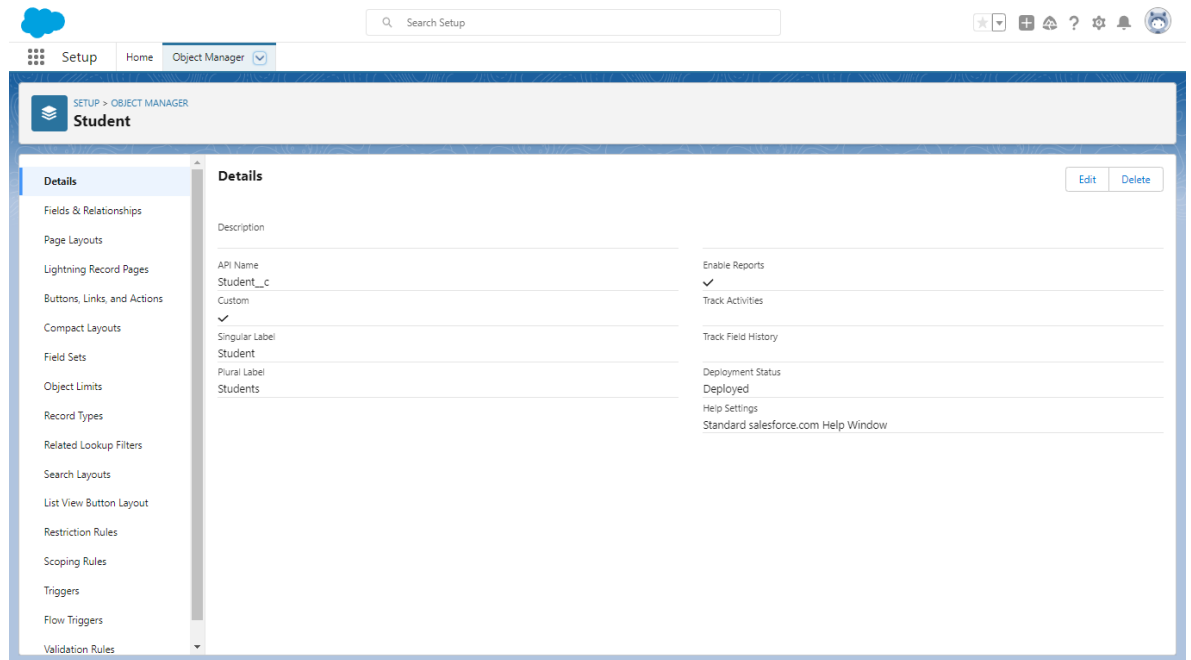


Fields & Relationships

11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(100)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Highest Marks	Highest_Marks__c	Roll-Up Summary (MAX Student)		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Students	Number_of_Students__c	Roll-Up Summary (COUNT Student)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School Websites	School_Websites__c	Text Area(255)		
State	State__c	Text Area(255)		

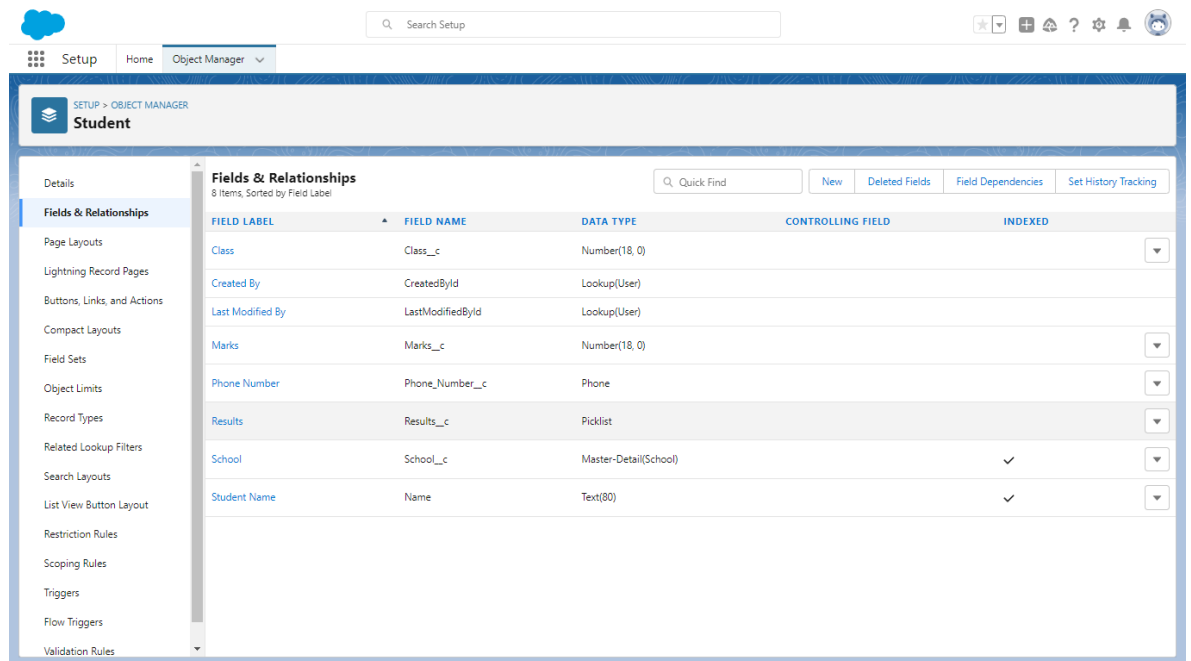
Student Object Activity



The screenshot shows the Salesforce Setup interface for the 'Student' 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, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The 'Details' tab is selected, displaying the following information:

- Description:** (Empty field)
- API Name:** Student__c
- Custom:** Custom
- Singular Label:** Student
- 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.



The screenshot shows the Salesforce Setup interface for the 'Student' object, with the 'Fields & Relationships' tab selected. The left sidebar is the same as in the previous screenshot. The 'Fields & Relationships' section displays a table of fields for the Student object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 8 items in total.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		<input type="checkbox"/>
Created By	CreatedBy	Lookup(User)		<input type="checkbox"/>
Last Modified By	LastModifiedBy	Lookup(User)		<input type="checkbox"/>
Marks	Marks__c	Number(18, 0)		<input type="checkbox"/>
Phone Number	Phone_Number__c	Phone		<input type="checkbox"/>
Results	Results__c	Picklist		<input type="checkbox"/>
School	School__c	Master-Detail(School)		<input checked="" type="checkbox"/>
Student Name	Name	Text(80)		<input checked="" type="checkbox"/>

Buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are located in the top right corner of the Fields & Relationships section.

A CRM APPLICATION FOR SCHOOLS/COLLEGES

Parent Object Activity

Setup

Home

Object Manager

Search Setup

Star

Dropdown

Home

Help

Settings

Notifications

Profile

Setup > OBJECT MANAGER

Parent

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

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

EditDelete


Setup
Home
Object Manager


Parent

SETUP > OBJECT MANAGER

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
 List View Button Layout
 Restriction Rules
 Scoping Rules
 Triggers
 Flow Triggers
 Validation Rules

Fields & Relationships

6 Items, Sorted by Field Label

Q Quick Find
 New
 Deleted Fields
 Field Dependencies
 Set History Tracking

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	Phone		

A CRM APPLICATION FOR SCHOOLS/COLLEGES

4 Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/thans131>

Team Member 1- <https://trailblazer.me/id/sabas61>

Team Member 2-
<https://trailblazer.me/id/eelavarasan2>

Team Member 3-
<https://trailblazer.me/id/akarasan>

Team Member 4-
<https://trailblazer.me/id/vinom34>

5 ADVANTAGES & DISADVANTAGE

ADVANTAGES

- CRM for educational institutions tracks and automates the tasks involved in the admission process, such as gathering and storing applicants' data, sending messages to inform about their enrollment status, etc.
- The student lifecycle begins with the admission and goes all the way to graduation.
- Schools, colleges, universities and other educational institutions need to store the academic information of their students and alumni. For this reason, they always need better ways to save this data securely.
- Education CRM software facilitates smooth information exchange, thereby promoting better running educational institutes. It helps you get instant information about change or other updates related to different operations, thus inculcates accuracy in decision-making.
- All-in-all, an effective CRM for educational institution help organizations improve operations, trim expenses, and grow revenues.

A CRM APPLICATION FOR SCHOOLS/COLLEGES

DISADVANTAGES

- There are many security issues with CRM, such as data loss and data being hacked by someone.
- In CRM, the collected data is stored at one centralized location that can be accessed by unfair means.
- 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.
- Lack of time and resources to plan a quality strategy and ensure a smooth transition to new software.

6 APPLICATIONS

- It helps schools and educational institutions automate admission processes and manage communication with students and parents.
- Schools use CRM systems to manage admission processes (follow-ups, open houses, grants, etc.), marketing communications, and automate admission workflows.
- CRM is an acronym that stands for customer relationship management. Customer relationship management is any tool, strategy, or process that helps businesses better organize and access customer data.
- 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.

7 CONCLUSION

- School CRM is a growing point of interest in developers and educational institutions alike. Because of this, there's a vast new range of software options covering CRM for schools that makes great use of the tools and functionality that have served founders, MBA students, and established businesses alike for so long.
- Recognizing the similarities in the enrollment journey to the sales funnel, it's a simple matter to convert established customer relationship management processes into a specialized recruitment and management tool for schools. What you're left with is a selection of some of the most helpful toolkits for teachers, students, and managers of educational institutions.

8 FUTURE SCOPE

- The goal for the future of customer relationship management is to make integrated sales, marketing, service, and commerce possible for all companies, and for companies to give potential and current customers connected, omni-channel experiences.
- CRM is predicted to become more powerful to support customer first, not company first businesses.
- Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by AI and mobile capabilities.
- The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal.