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.

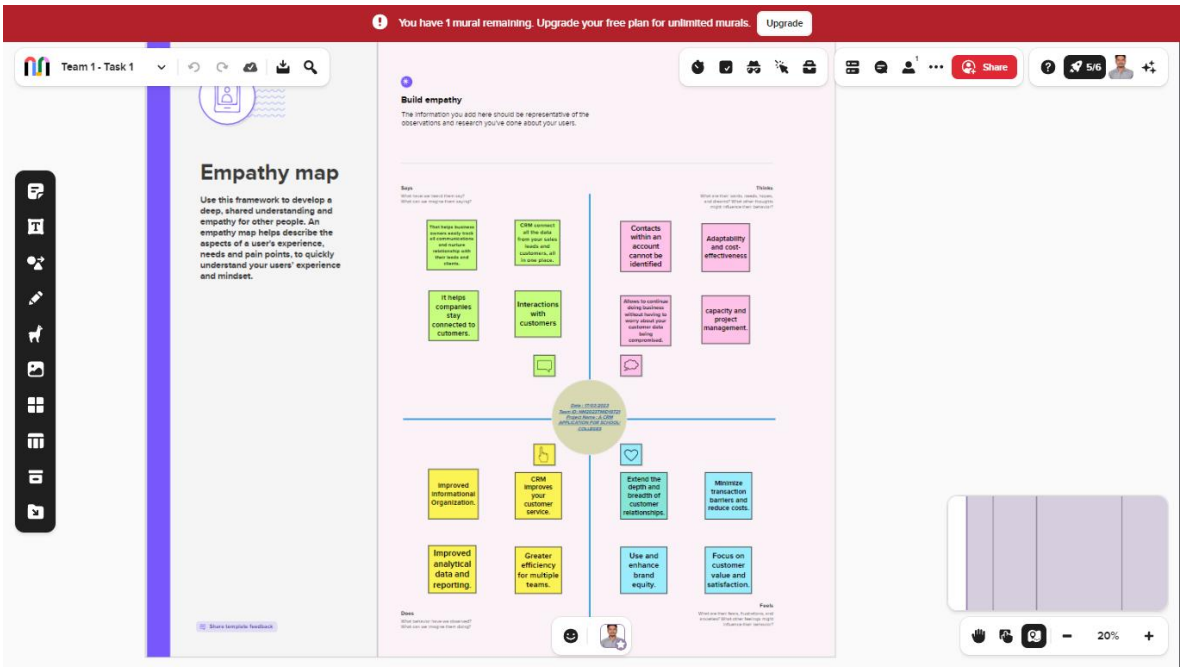
1.2 Purpose

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

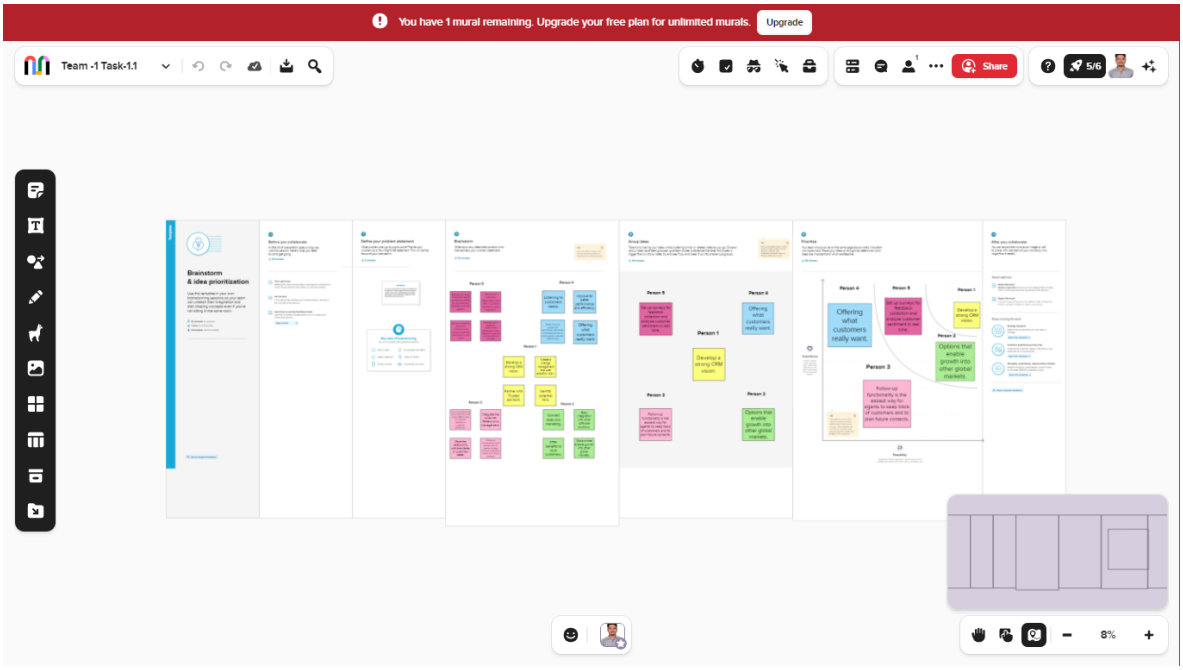
A customer relationship management (CRM) solution helps you find new customers, win their business, and keep them happy by organising customer and prospect information in a way that helps you build stronger relationships with them and grow your business faster.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



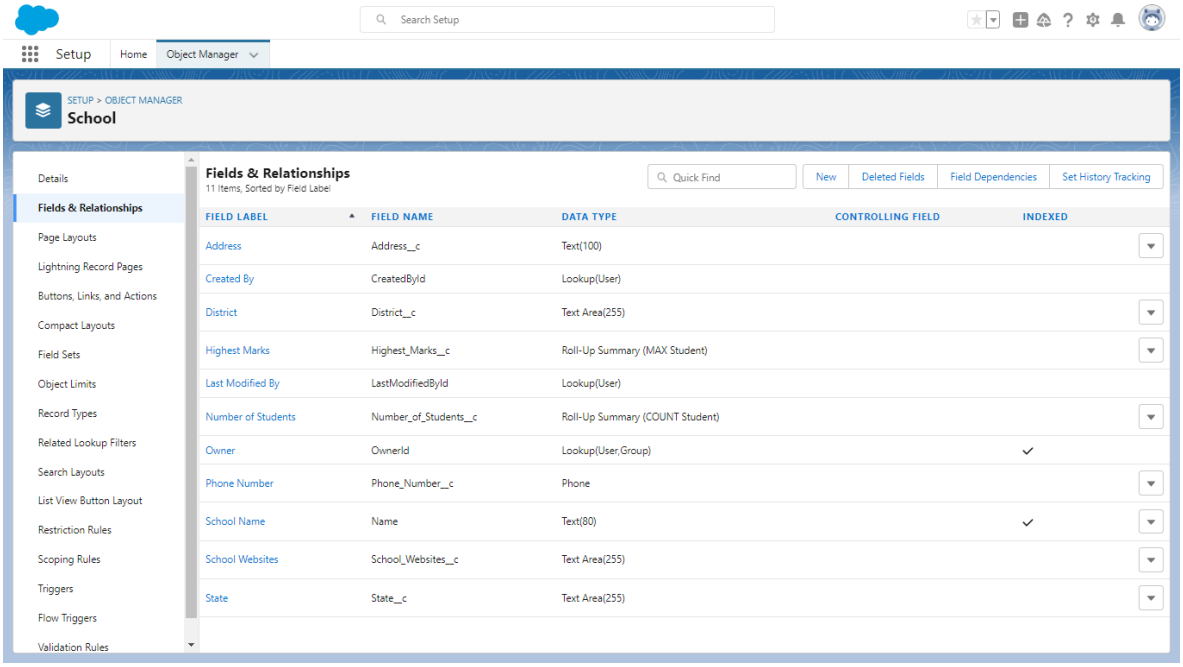
3 RESULT

3.1 Data Model:

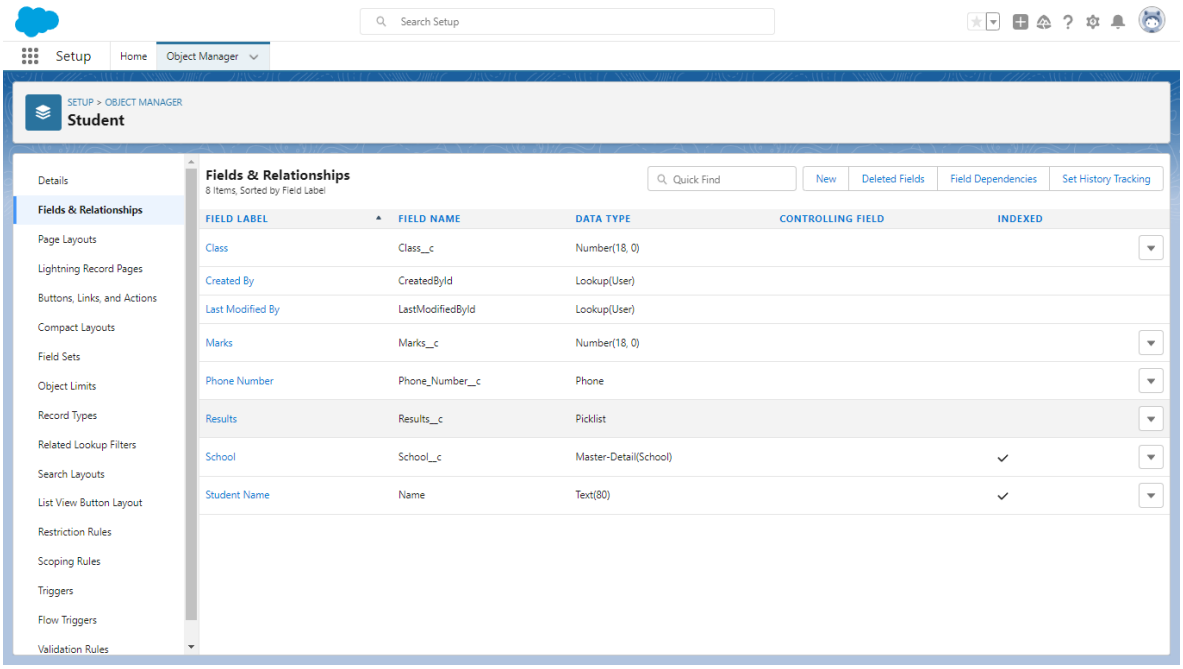
<table>
<tr><th>Object name</th><th>Fields in the Object</th></tr>
<tr><td>School</td><td>
<table>
<tr><th>Field label</th><th>Data type</th></tr>
<tr><td>Address</td><td>Area</td></tr>
<tr><td>District</td><td>Area</td></tr>
<tr><td>State</td><td>Area</td></tr>
<tr><td>School</td><td>Area</td></tr>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

3.2Activity & Screenshot

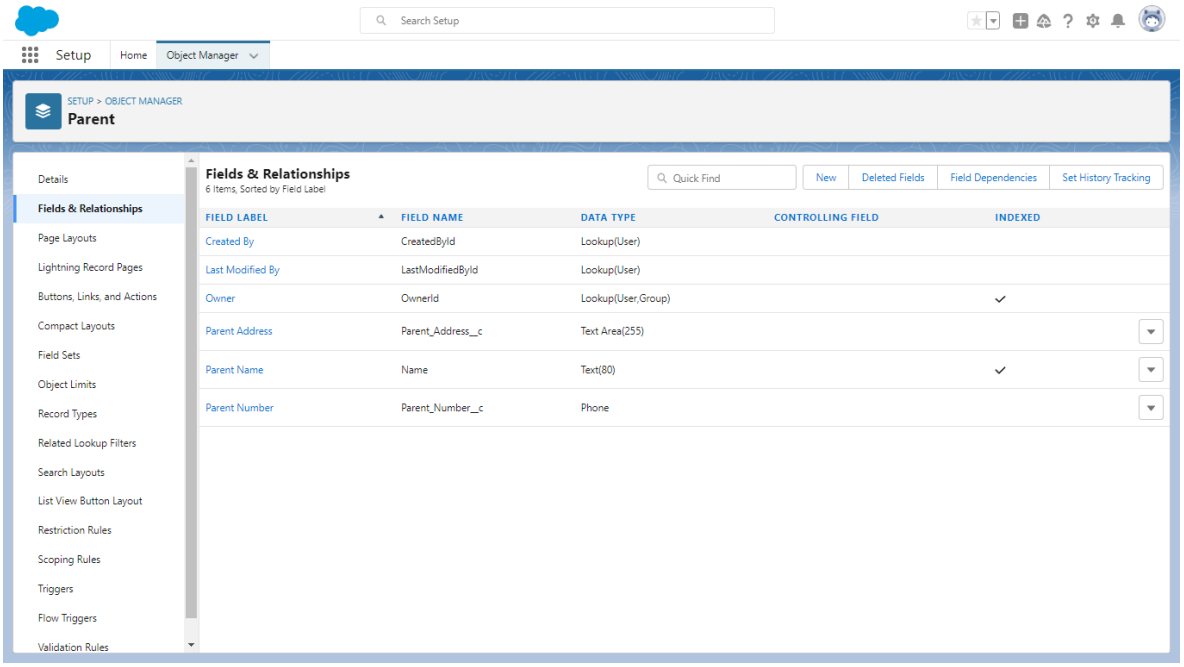
School Activity



Student Activity



Parent Activity



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

- 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.

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.