A CRM Application For School or College

1. Introduction

1.1. Overview:

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.

1.2. Purpose:

Using CRM in education industry provides organisations with the tools they need to improve enrolments, lead management, automated communication, data-driven decision-making, student engagement, revenue, better communication, easy tracking of student performance and attendance, alumni engagement and many more.

2. Problem Definition &Design Thinking

2.1.EmpathyMap:
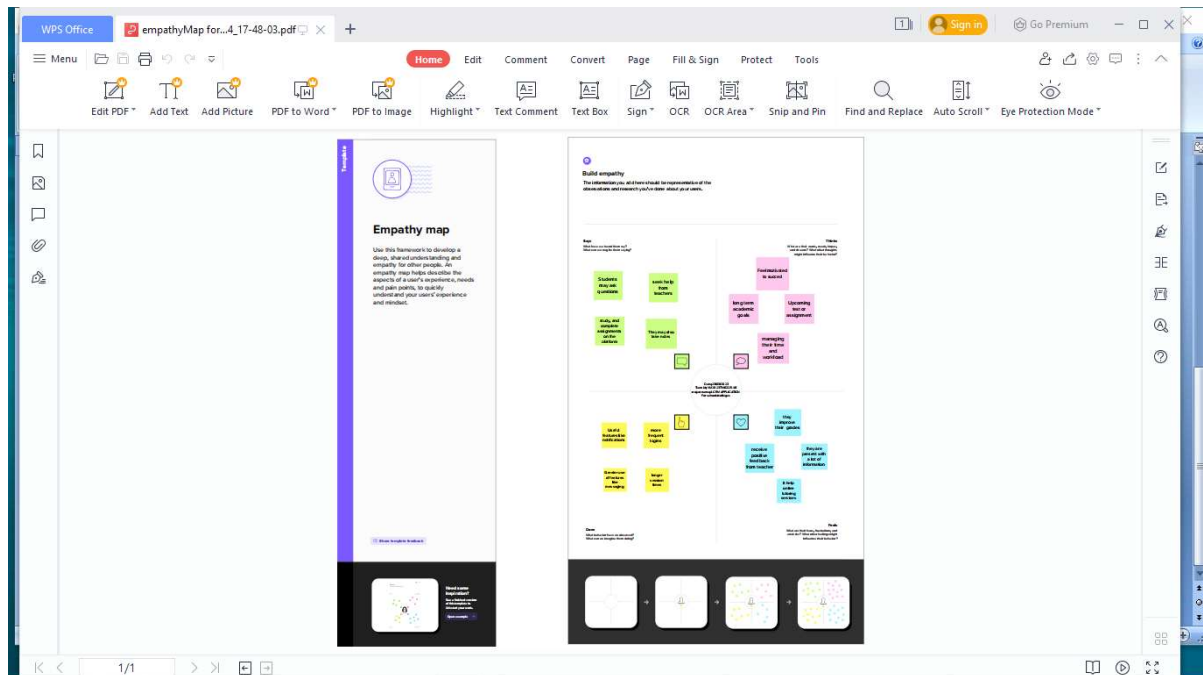

2.2.Ideation&BrainstormingMap
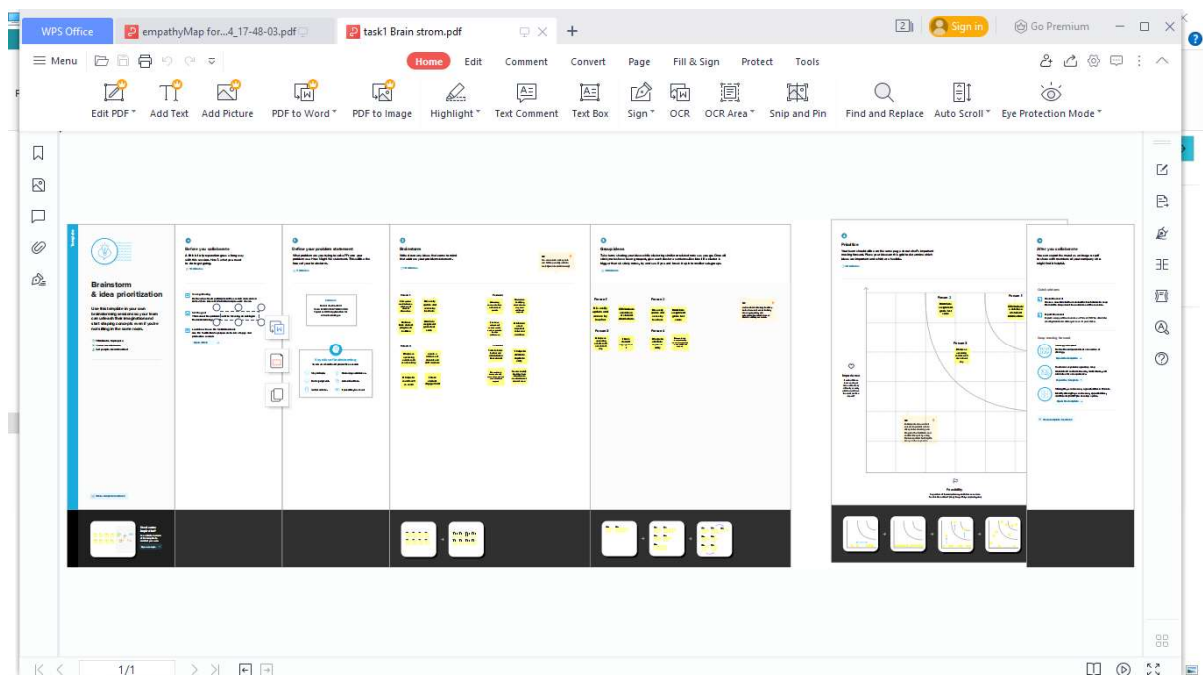
3. Result

3.1.Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
school	**Field label**	**Data Type**
	Address	Text area
	Number of student	Rool up summary
	Phone number	Phone
Student	**Field label**	**Data Type**
	Phone number	Phone
	School	Master detail relationship
	Result	Picklist
	Class	Number

Parent	Field label	Data type
	Parent Address	Text
	Parent Number	Phone

3.2.Activity And Screenshoot:

Milestone 1:Creating developer account
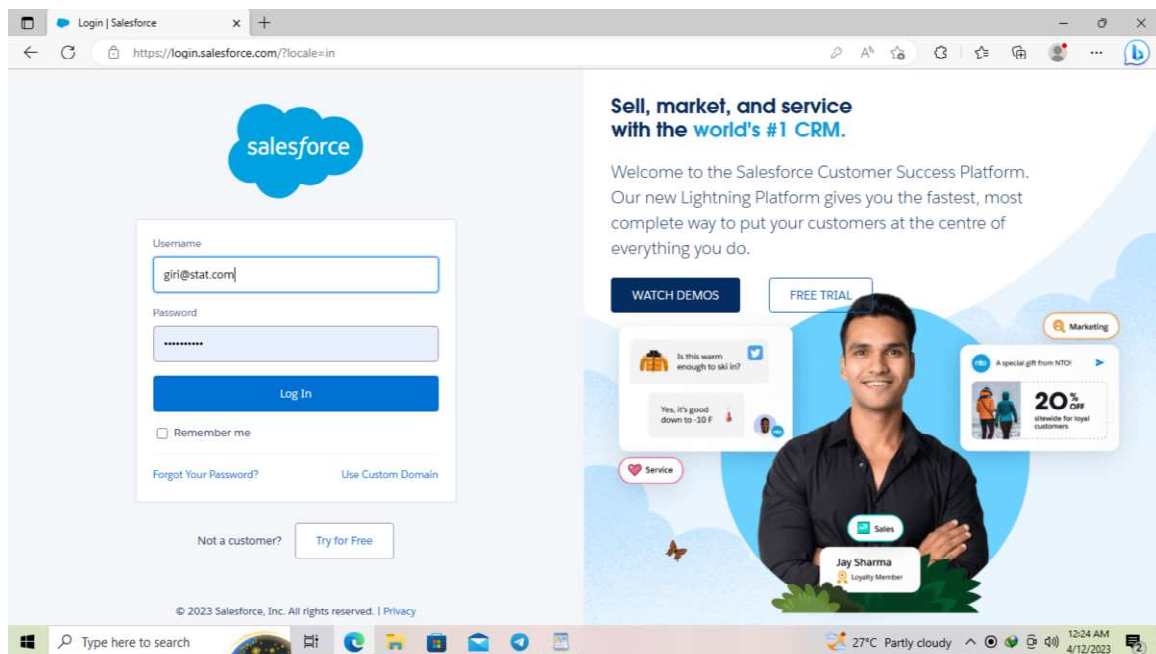
Milestone 2: Creating object

Activity 1:Create school object
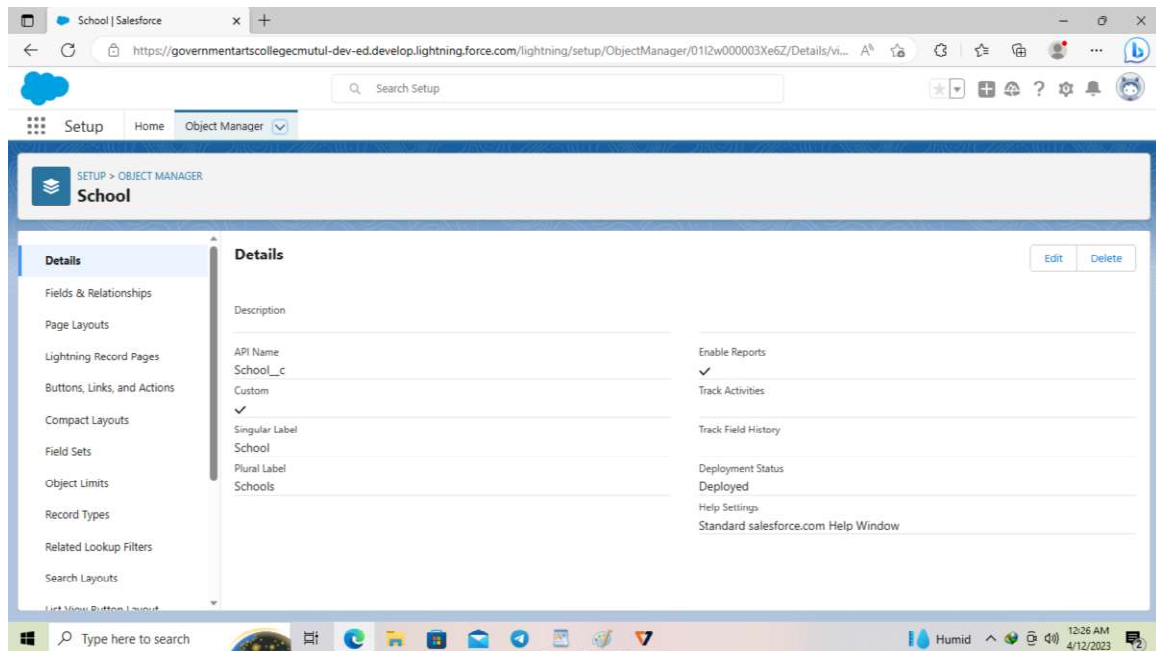
Activity 2:Create student object
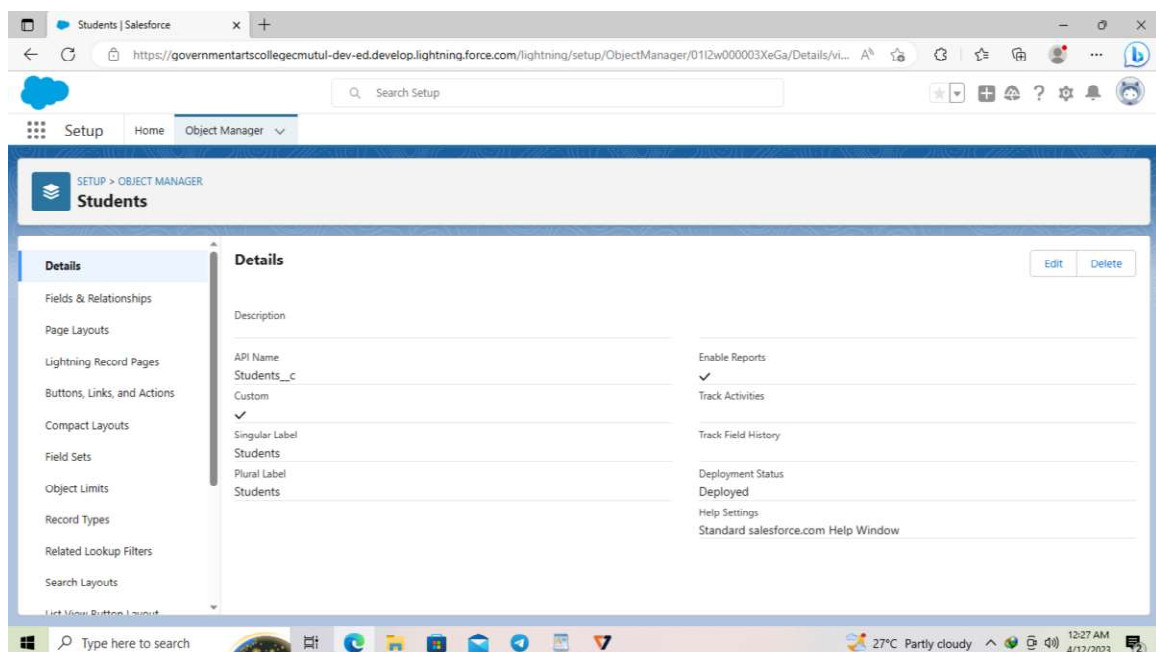
Activity 3:Create parent object
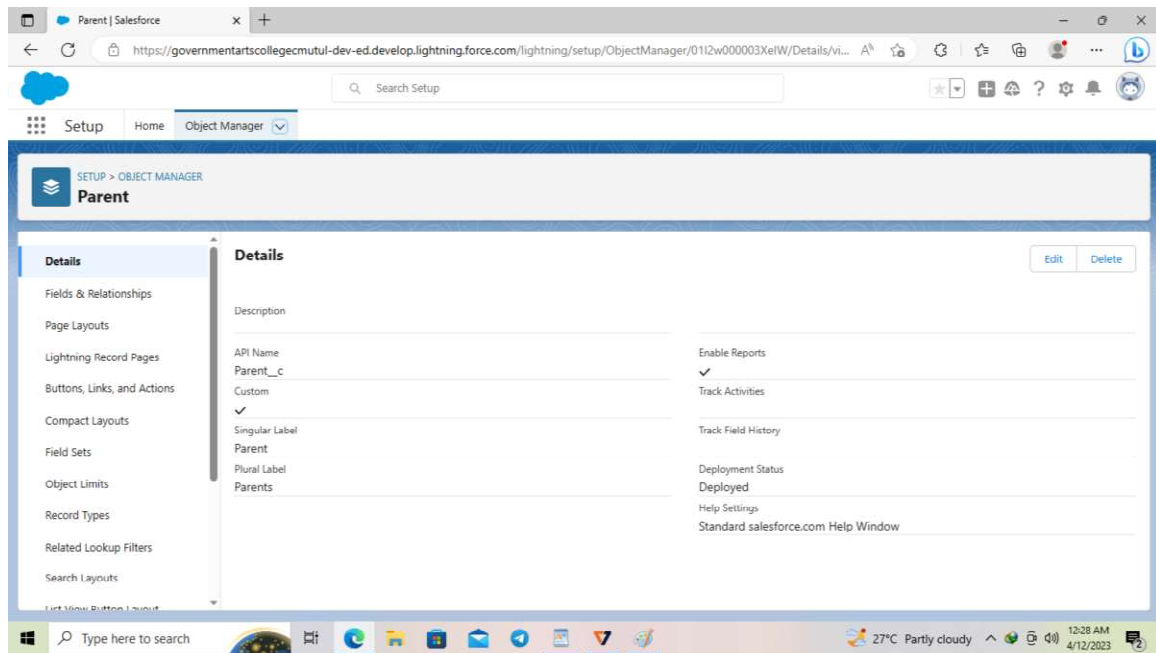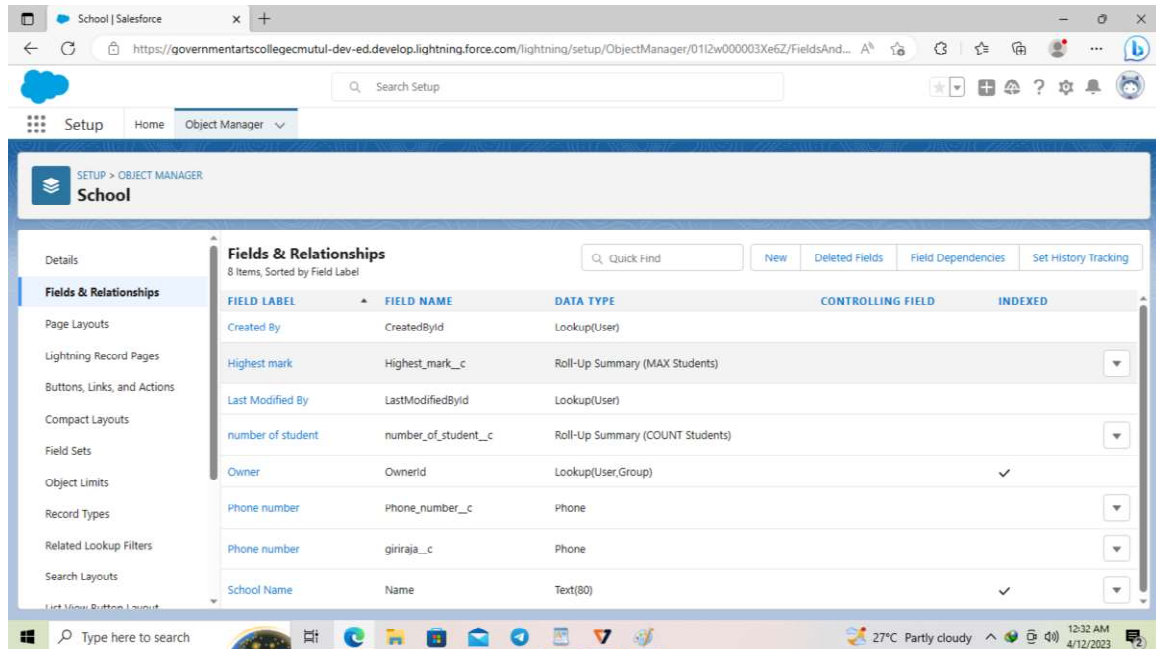
Milestone 3:Lighting App
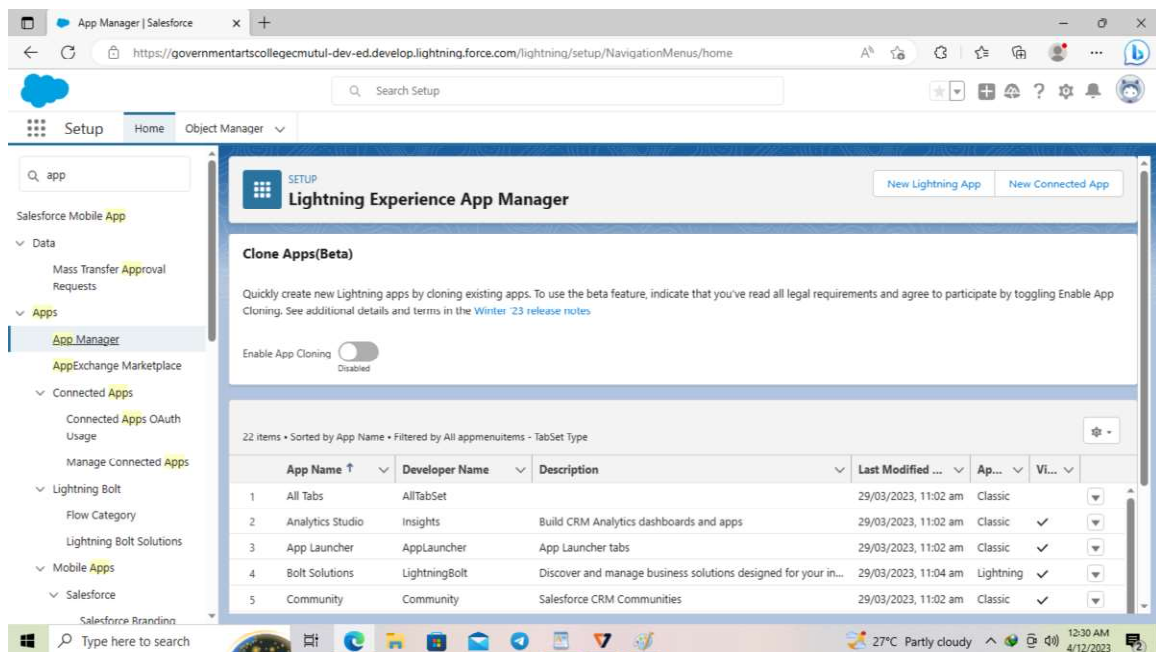
Milestone 4:Fields And Relationship
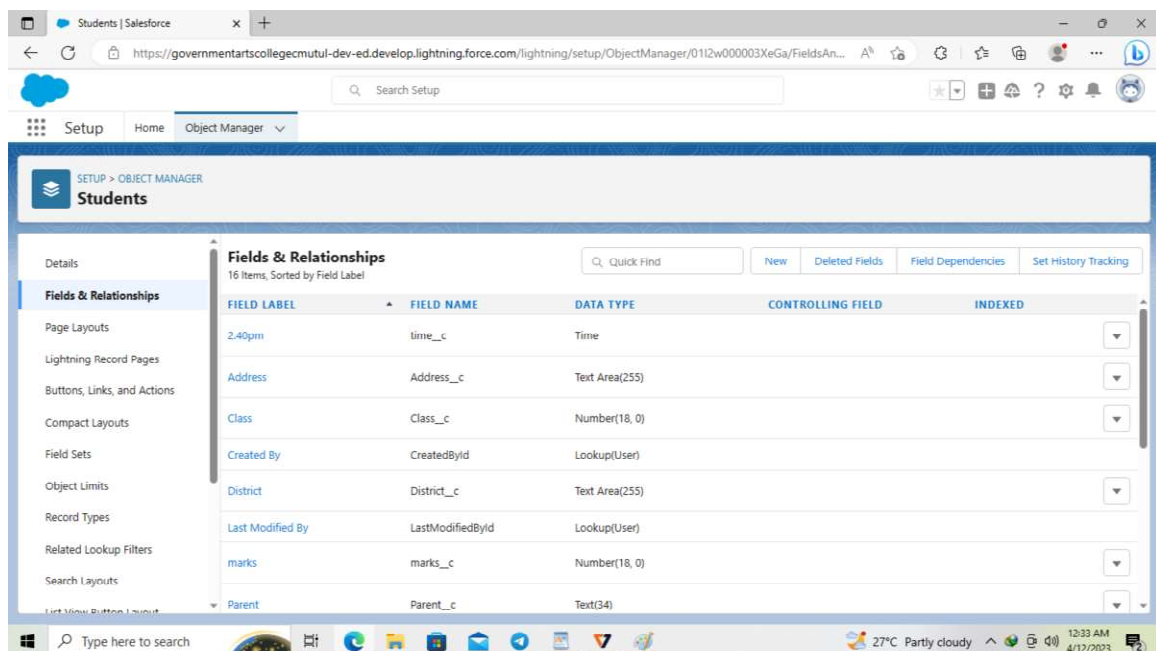
Activity 1:Create field for school object

Activity 2:Create field for student object
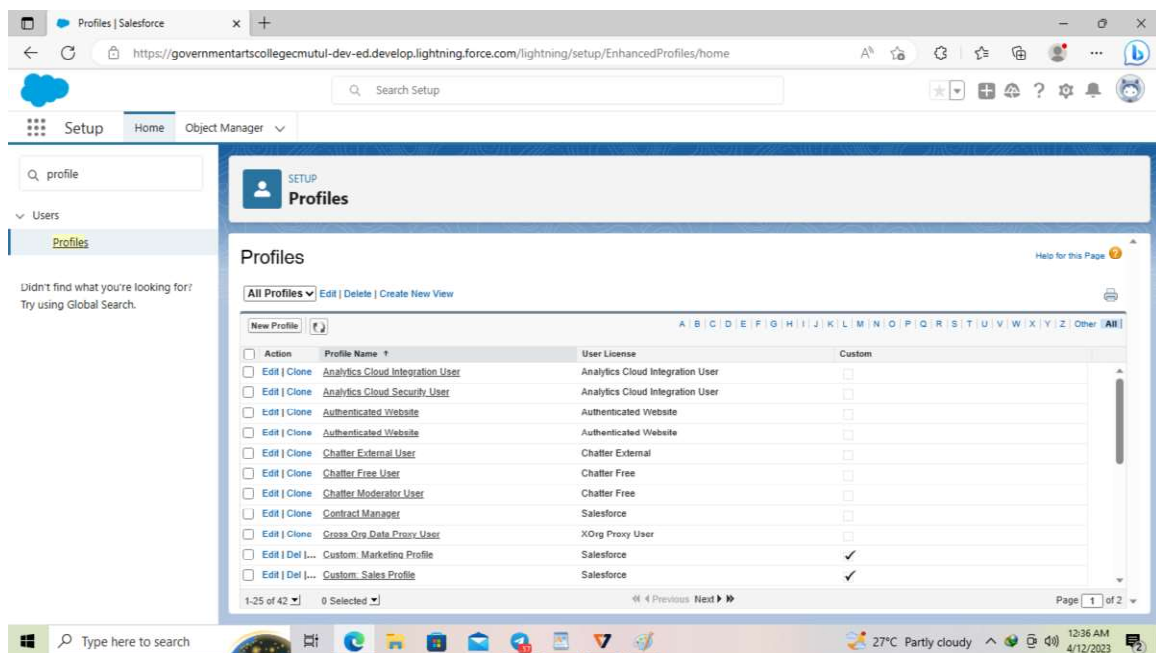
Activity 3:Create field for parent object

Milestone 5:Profile

Milestone 6:Users

Milestone 7: Permission sets

Milestone 8:Reports

4. Trailhead Profile Public URL

Team Lead-https://trailblazer.me/id/gdharan16

Team Member 1-https://trailblazer.me/id/girik18

Team Member 2-https://trailblazer.me/id/dganesan17

Team Member 3 –https://trailblazer.me/id/dkishore18

Project Report Template

5. Advantage&Disadvantage:

ADVANTAGE:

1.Improved Informational Organization. ...

2.CRM for Enhanced Communication. ...

3.CRM Improves Your Customer Service. ...

4.Automation of Everyday Tasks. ...

5.Greater efficiency for multiple teams. ...

6.Improved Analytical Data and Reporting.

DISADVANTAGE:

CRM costs. One of the greatest challenges to CRM implementation is cost. …

Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. …

Poor communication. …

Lack of leadership.

6. Application:

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project theymwill gain knowledge and can include it into their resume as well.

7. Conclusion:

Customer Relationship Management(CRM) enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

8. Future Scope:

Defining the scope of CRM projects means figuring out which areas of your business need to be included in the CRM implementation plan. Before any CRM initiative begins, scoping is essential to establish what the effort will and will not cover, as well as to prevent feature creep and project bloating.