

Project Report Template

CRM APPLICATION OF SCHOOL AND COLLEGE

1.INTRODUCTION:

1.1 Overview

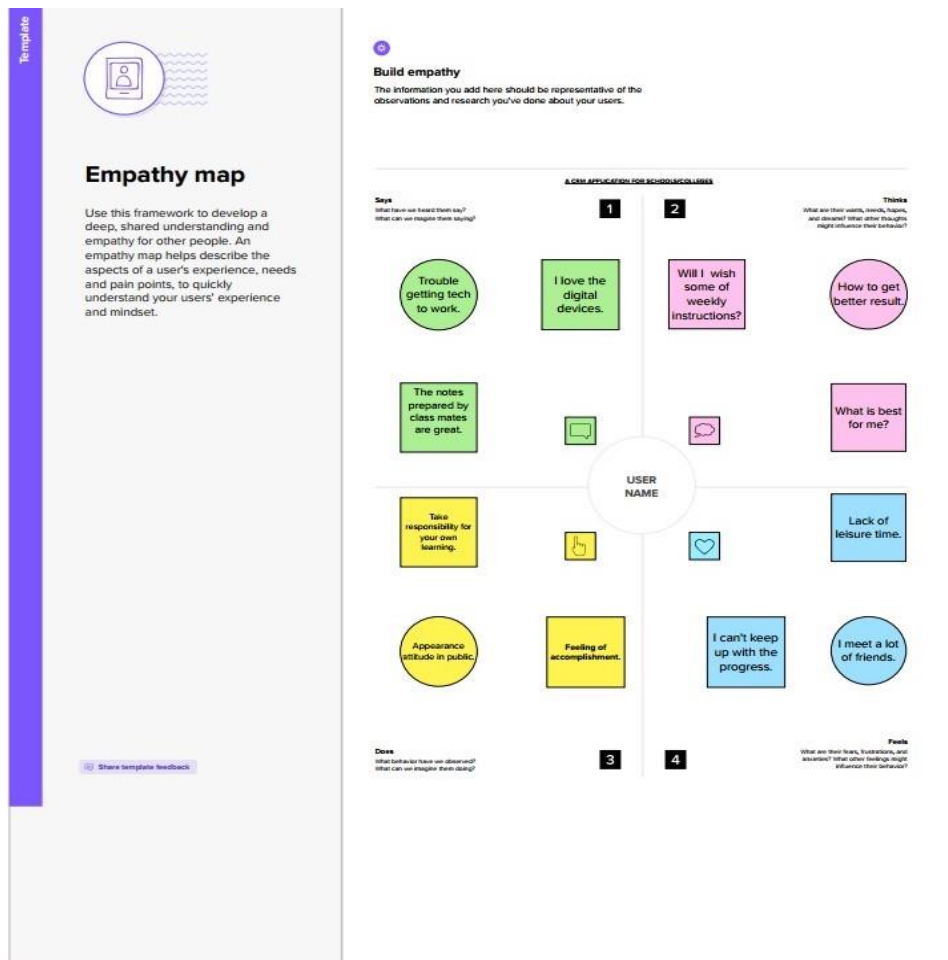
A CRM is a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access place.

1.2 Purpose

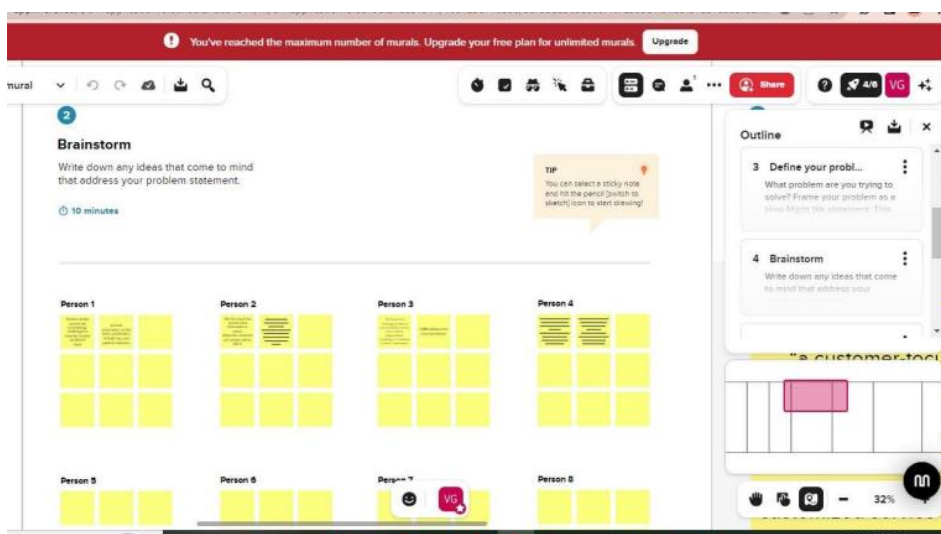
A CRM system can help educational organization's effectively manage and track leads, resulting in improved enrolment numbers. Additionally, by personalizing communication and providing automated follow-up, educational organization can build better relationships with students and leads, and keep them engaged over time.

PROBLEM DEFINITION & DESIGN THINKING:

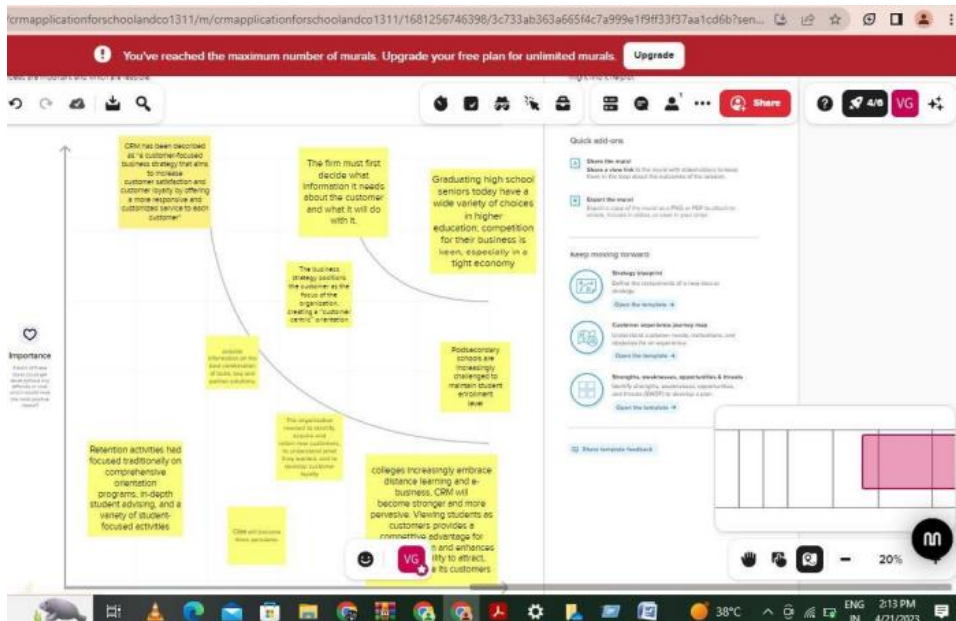
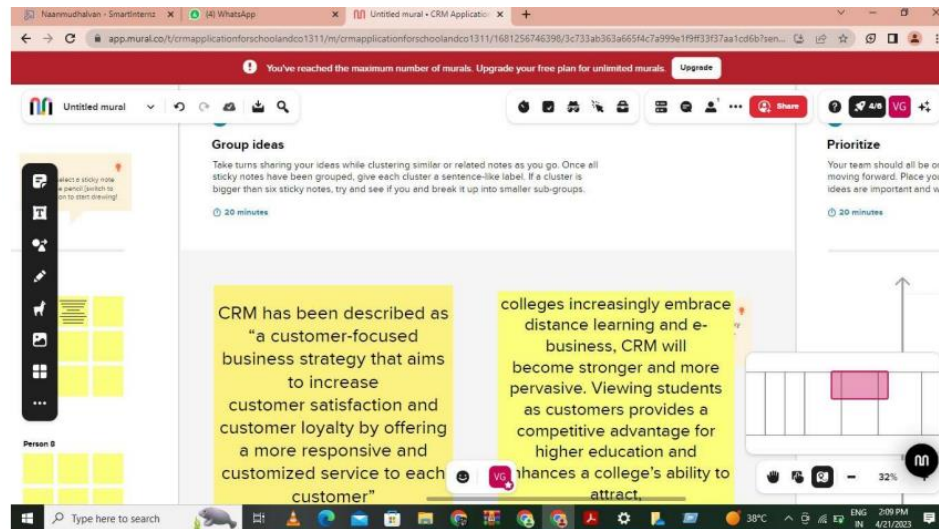
2.1 Empathy map



2.2 Ideation & Brainstorming MAP



Group Ideas

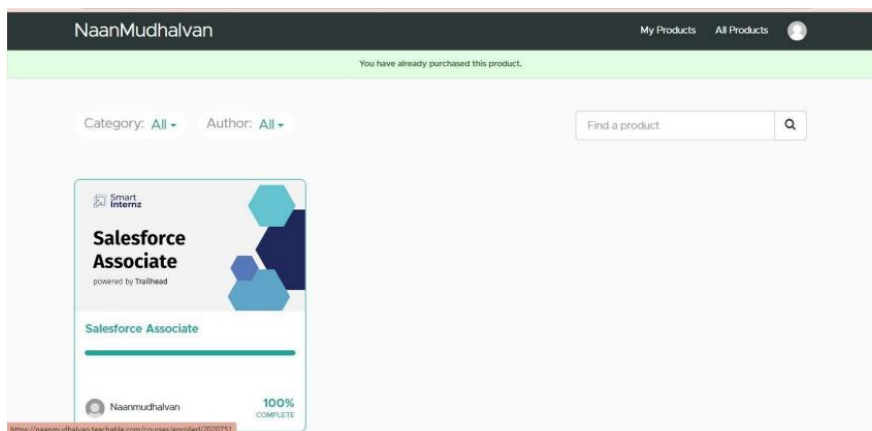


RESULT:

3.1 Data model

Object name	Field in the object	
School	Field label	Data type
	School Name	Text(80)
	Number of Student	Roll-Up Summary (COUNT Student)
	Phone Number	Phone
	Address	Text Area(255)
	District	Text Area(255)
	State	Text Area(255)
	Highest Marks	Roll-Up Summary (MAX Student)
Parent	Field label	Data type
	Parent Address	Text Area(255)
	Parent Number	Phone
Student	Field label	Data type
	Class	Number(18,0)
	Marks	Number(18,0)
	Phone Number	Phone
	Results	Picklist
	School	Master-Details(School)

3.2 ACTIVITY & SCREENSHOT



First Section

✓ 24 / 24 complete

✓ Discover Salesforce Customer 360

Review

✓ Get to Know Customer 360

Review

✓ Introduction to trailhead

Review

✓ Salesforce platform basics

Review

✓ Exposure to Contacts

Review

✓ App Exchange Basics

Review

✓ Deep Dive into App Exchange

Review

✓ What is Salesforce and CRM?

Review

100% COMPLETE

Naanmudhalvan

Teach online with teachable

Setup

Object Manager

Search Setup

Object Manager

Items Sorted by Label

Label

API Name

Type

Description

Last Modified

Deployed

Student

Student__c

Custom Object

19/04/2023

✓

Setup

Object Manager

Search Setup

Object Manager

Items Sorted by Label

Label

API Name

Type

Description

Last Modified

Deployed

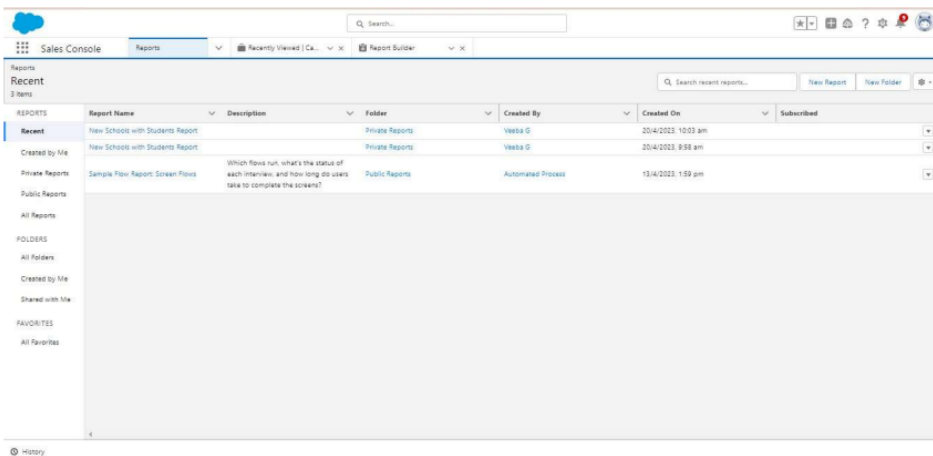
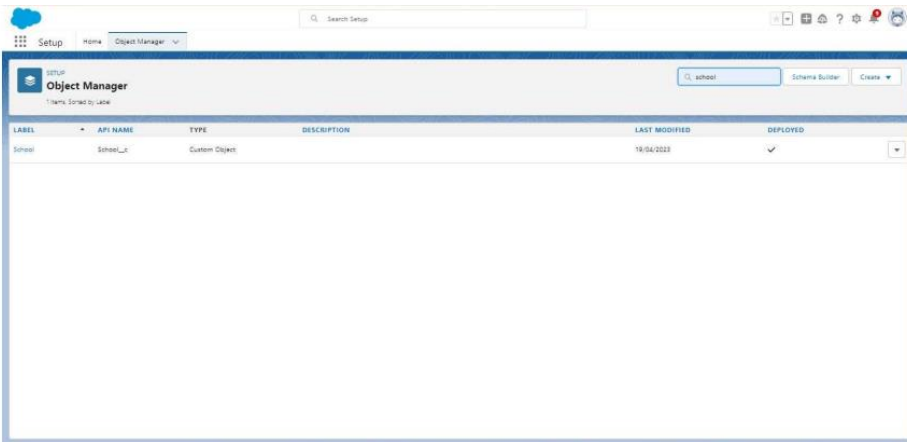
Parent

Parent__c

Custom Object

19/04/2023

✓



4. Trailhead Profile Public URL

Team Lead :<https://trailblazer.me/id/veebg>

Team member 1:<https://trailblazer.me/id/prasanna9976931342>

Team member 2:<https://trailblazer.me/id/boomikaa333>

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

Project Report

5.ADVANTAGES OF CRM

- Improve Student Admissions Lifecycle. ...

- Track Student Life-Cycles Within the Institution. ...
- Keep Alumni Information Safe and Accessible. ...
- Stay Connected with Teams. ...
- Monitor Fee Payments and Reminders.

DISADVANTAGES OF CRM

- 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.APPLICATIONS

- Tracking Customers.
- Collecting Data for Marketing.
- Improving Interactions and Communications.
- Streamlining Internal Sales Processes.

7.CONCLUSION OF CRM

A CRM is a system that helps schools manage the entire lifecycle of a potential customer — sometimes also referred to as a lead. With a CRM, you can track and store the data that's important to your operations, all in one easy-to-access.

8.FUTURE SCOPE

A CRM can help you store customer data such as user behavior, how long a customer has been with your business, purchase records, and notes on sales interactions, which you can use to optimize your sales and marketing processes and improve customer service across your organization.