

# A CRM Application to Manage the Services offered by an Institution

## **Problem Statement**

Institutions often provide a wide range of services to students, staff, and external stakeholders. However, managing these services manually or through disconnected systems leads to challenges such as inefficient tracking, poor communication, lack of transparency, and difficulty in maintaining service records. This results in delays, reduced satisfaction, and limited insights for decision-making.

A Customer Relationship Management (CRM) application is required to streamline the management of services offered by the institution. The system should enable centralized service requests, automated tracking, structured communication, and reporting dashboards. By integrating all service-related activities into a single platform, the CRM will enhance efficiency, improve user experience, and support administrators in making data-driven decisions for continuous improvement.

PHASE-1:

## **Phase 1: Problem Understanding & Industry Analysis**

### **1. Requirement Gathering**

The first step is to collect and document the needs of the institution. This involves conducting surveys, interviews, and meetings with students, faculty, administrators, and staff to identify the services they use and the issues they face. Typical requirements may include service request management, communication channels, service history tracking, automated notifications, and reporting capabilities.

### **2. Stakeholder Analysis**

Different stakeholders interact with the institution's services in unique ways. For example, students may request academic or administrative services, faculty may need support for teaching resources, and administrators may require performance reports. Understanding the expectations, responsibilities, and pain points of each stakeholder ensures that the CRM application addresses everyone's needs effectively.

### **3. Business Process Mapping**

The existing workflow of how services are requested, approved, processed, and delivered is analyzed and visualized. This step highlights bottlenecks, redundancies, and gaps in the current system. By mapping these processes, the project team can design optimized workflows that the CRM application will automate, thereby improving efficiency and accountability.

### **4. Industry-specific Use Case Analysis**

Educational institutions, healthcare organizations, and training institutes each manage services differently. By studying similar institutions and their CRM practices, best practices can be identified. For example, in education, CRMs often integrate student support services, course registration, and feedback mechanisms. Benchmarking against industry use cases helps in tailoring the CRM solution to meet the institution's exact requirements.

### **5. AppExchange Exploration**

Salesforce AppExchange (or similar CRM marketplaces) provides ready-to-use applications, extensions, and templates that can accelerate development. Exploring AppExchange allows identification of pre-built solutions for service management, reporting, and communication, which can be customized rather than built from scratch. This reduces development time and ensures compliance with industry standards.