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DEFINING A NEED OF A CORPORATE CRM SYSTEM OF AN ENTERPRISE PEN IN INDIA

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Abstract

This article explores the administrative challenges faced by modern educational institutions, using the case of Podar Education Network (PEN) in India. Despite being one of the country's largest private school networks, PEN operates without a centralized digital system, relying heavily on manual data handling and Excel spreadsheets. The aim is to identify key operational inefficiencies—such as errors in personal data, fee calculations, scheduling, and student transfers—and demonstrate how these can be systematically resolved through the implementation of a customized CRM system. The research highlights the strategic importance of CRM in improving educational administration, decision-making, and stakeholder satisfaction.

Keywords: CRM, education, India, private school, digitalisation

1 Introduction

Modern educational institutions require not only pedagogical excellence, but also effective administrative management. Educational administrators play a key role in creating an environment that promotes student learning and development. Their responsibilities extend far beyond day-to-day administration – they guide the strategic development of schools, coordinate the work of staff, manage resources, and ensure the implementation of educational programs. Organizational processes in the educational environment are a complex system that includes personnel management, curriculum development and implementation, financial planning, and ensuring an inclusive and supportive atmosphere. Educational institutions are faced with the need to balance regulatory requirements, budgetary constraints, and student needs. At the same time, even basic administrative tasks – such as scheduling classes, student support, or document processing – require a high level of precision and coordination.[1] At the same time the National Center for Education Statistics reports that 40% of school administrators cite poor

communication and data mismanagement as key challenges affecting institutional effectiveness.[2]

Modern educational administration is not just a management function, but a complex, multi-level process involving a variety of structures, regulations, human and material resources. According to academic literature, educational governance requires the integration and coordination of all components, from pedagogical approaches to infrastructural and human resources. However, in practice, effective coordination of these elements faces a number of serious challenges, especially in the context of a diversified system, both at the district and block or cluster levels. One of the key factors complicating governance is the need to take into account the social, geographical and cultural heterogeneity of the educational environment, which complicates the standardization of processes and requires flexibility in approaches. An additional challenge is the complexity of interactions between administrative levels and educational institutions. In practice, this results in excessive administrative workload, a lack of transparency in operations, and untimely decision-making. All this points to the need to move towards more systemic, digital management models that can facilitate data integration, improve coordination, and reduce operational risks. [3]

Special attention in the framework of modern scientific [4] and applied discussion is given to the use of customer relationship management (CRM) systems in the field of education. Although traditionally CRM systems were used mainly in the commercial sector to optimize interactions with clients, in recent years there has been a rapid growth in interest in their implementation in educational institutions of various levels. This is explained by the fact that an educational organization, in fact, also functions as a structure focused on satisfying the needs of various categories of users – students, parents, teachers, administrative staff, graduates and external partners.

Modern research[5] emphasizes that CRM in education performs a broader function than just managing applications or storing contact information. Such systems allow centralized tracking of the life cycle of interaction with students – from the moment of the initial request or registration to the completion of training and the inclusion of graduates in the alumni network. They ensure personalization of educational experience, automation of communication, integration of data from different departments of the institution, as well as monitoring of satisfaction and engagement of students. The relevance of the topic of using CRM in the management of educational institutions is actively emphasized in the academic literature [6] which is associated not only with the growth of digital capabilities, but also with a change in the paradigm of management in the field of education. More and

more attention is paid to the orientation towards a student-centric approach, data analytics for decision-making and the need to create flexible, responsive administration models.

Moreover, a survey by EdTech Magazine found that 79% of educational institutions consider CRM systems essential for enhancing operational efficiency [7] and research by McKinsey & Company experts states that educational institutions spend up to 30% of their time on administrative tasks that could be automated with CRM systems. [8]

In addition, it is also proven [9], that schools using traditional methods for student and parent data management have 30-40% higher administrative costs than those using CRM-based automation. It is important to emphasize that the use of CRM systems in the educational sphere is not limited exclusively to higher education institutions. In practice, secondary specialized institutions such as colleges and vocational schools are also showing increasing interest in these technologies. This is due to the fact that the tasks facing the administration of these institutions are in many ways similar to those at the university level: admission management, academic performance monitoring, organizing internships, and interacting with parents or employers.[10] At the same time, it is in such institutions that the workload of administrative personnel is especially acute, and resources, both financial and human, are often limited. As a result, the need for systemic optimization of processes becomes not only desirable, but also vital. One of the universal goals for any educational institution, regardless of level and profile, is to reduce administrative costs while simultaneously improving the quality of education provided. In the context of constantly growing expectations from students and parents, as well as the need to comply with state and professional standards, institutions are faced with a dilemma: how to increase efficiency without increasing the budget. In this context, the implementation of CRM systems acts as an effective mechanism for achieving a balance between costs and quality.[11] By automating key processes – from documentation to personalized communication – an educational institution gets the opportunity to redistribute resources, reduce the share of manual work, increase the accuracy of operations and focus on developing the educational component.

Overview

Podar Education Network or PEN, established in 1927, has grown into a leading educational institution in India with 149 managed schools and 123 partner schools, serving over 250000 students annually.[12] PEN covers a wide geography, represented in more than 149 cities across India, including the states of Maharashtra, Gujarat, Karnataka, Madhya Pradesh, Punjab,

Andhra Pradesh and others. With such a large network of schools, the organization has a standardized admissions process, which ensures transparency, uniform criteria and convenience for both new students and those transferring from other educational institutions. One of the key features of the Podar network is the ability to seamlessly transfer between schools within the network – the so-called Inter-Podar Transfer.[13] This system is especially important for families with frequently changing residence: when moving to another city, a student can easily continue his or her education at the nearest school in the network without losing the academic rhythm, having to re-take the admissions process or adapt to a new academic structure.

In the internal management of PEN, one of the key challenges, in addition to the vast geography and the need for coordination between schools, is the tiered fee structure, which places a significant burden on administrative processes. The fee structure varies by grade, with one set of rates for students in grades one through four and another for grades five through ten. Moreover, tuition varies for new students and for those already enrolled in the network on a regular basis. In addition, flexibility is provided in payment methods: families can pay the full amount up front (often accompanied by a discount) or choose to pay in installments.[14] An additional complexity in the management of PEN is the recording of academic results, which varies not only across grade levels but also across regions and schools. Although there are pan-Indian assessment standards, in reality schools in different states may adapt the recording system in accordance with local specifics and educational policies. An additional complication arises from the fact that the educational process in PEN is often organized in thematic groups: students may be grouped according to interests or educational areas. Such groups do not always coincide with classes, and subject teaching may take place in mixed compositions, which requires flexibility in planning and tracking attendance, grades and academic performance. Although at the level of an individual school such structures can still be coordinated manually, the lack of a centralized platform at the level of the entire network makes the formation of a unified methodological picture extremely difficult.

As a result, the PEN system faces a number of significant administrative challenges. One of the most obvious challenges is related to the heterogeneous payment system. This not only complicates accurate accounting and revenue planning, but also increases the risk of calculation errors, causing dissatisfaction on the part of parents and students. The second challenge is the lack of a unified system of academic assessment. This situation complicates objective monitoring of students' progress and prevents the formation of a unified analytical base at the level of the entire organization. Despite the

obvious complexity of the organizational structure and the scale of the network, PEN still lacks a centralized digital management system, and most administrative processes at the level of individual schools are carried out manually, mainly in Excel spreadsheets. This applies to both student and grade records, as well as schedule planning, application registration, and financial data processing. Some schools have attempted to implement free versions of enterprise solutions, such as basic CRM plans (e.g. Zoho CRM), but such tools are not integrated into the overall PEN infrastructure and are usually used in a targeted and isolated manner. As a result, there is no full-fledged data exchange between schools: all communication on student transfers, information synchronization, or report transmission is carried out via email, which not only slows down processes, but also significantly increases the risk of errors, data duplication and information loss.

When analysing administrative processes using three key schools from the PEN network, namely Podar International School Mumbai Central, Podar International School Powai, Mumbai and Podar International School Thane then the key issues within personal data processing are presented on Figure 1.

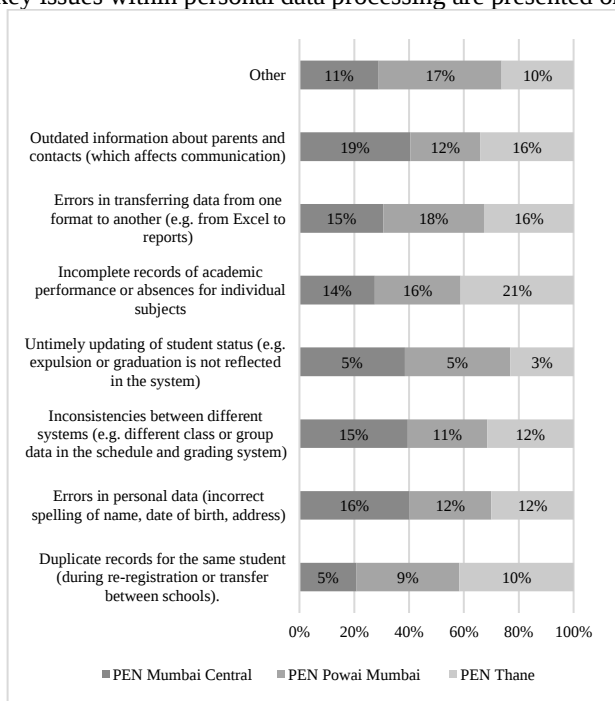


Figure 1 Key issues with personal data processing

Accordingly, the issues with scheduling are presented on Figure 2.

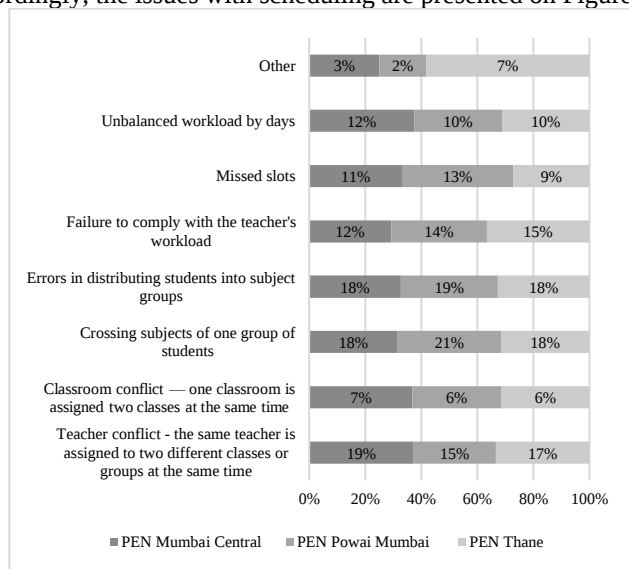


Figure 2 Key issues with scheduling

One of the most common issues is teacher conflicts, where the same teacher is assigned to two different classes or groups at the same time.

The fee and payment analysis revealed that the financial processes at these institutions are prone to significant failures as well and the most common error is the miscalculation of tuition fees due to incorrect application of age or class rates. This issue occurs in 21-22% of cases across all three schools. Incorrect classification of student status – the distinction between new and regular students, which determines the amount of fees – also has a significant impact on the accuracy of billing. This type of error is most pronounced at Thane (23%) and Powai (21%). Duplicate billing was also common, particularly at Thane (21%), which creates confusion for parents and requires manual adjustments by the administration. Errors in payment schedules, including incorrect dates and deadlines, are recorded on average among 10-17% of students, especially in Mumbai Central (17%).

Decision

Based on the situation description, two groups of problems that PEN faces can be distinguished: primary problems, i.e. operational, systemic failures at the level of day-to-day administration, and secondary problems, i.e. broader consequences affecting the level of strategic management and decision-making. Primary problems present themselves in the daily work of schools and are a direct consequence of the lack of a centralized CRM system:

1. Errors in students' personal data (duplication, incorrect entries, outdated contact information).
2. Errors in calculating tuition fees (incorrect pricing, incorrect student status, duplicate invoices, miscalculations in payment schedules).
3. Conflicts in schedules and distribution of teachers/classrooms (overlapping subjects, errors in groups, unbalanced workload).
4. Poor consistency across PEN schools when transferring students (grades are not portable, data formats are inconsistent, manual email communications are required).

The overall problem can be formulated as: The primary issue is the lack of a centralized system to efficiently manage interactions and streamline data across various schools within the network, leading to inefficiencies and potential customer data mismanagement.

These primary issues lead to system failures, staff overload, parent and student complaints, and reduced accuracy, transparency, and processing speed. The secondary issues are the consequences of the primary failures that make it difficult to operate at the network management level and create strategic risks like fragmented data makes it difficult to conduct analysis across PEN and delays in decision making due to the need to manually request data from different schools as well as inability to quickly identify problem areas (e.g., a drop in performance at a particular school or a failure in the payment system).

Conclusion

Based on the introduction, author can summarize that the modern educational system needs to rethink the role of administrative management. In the context of growing data volumes, high variability of educational models and expanding requirements from students, parents and regulators, traditional approaches – based on manual processing, paper documents and fragmented IT solutions – are becoming less and less effective. Particular attention in recent years has been paid to digital tools, such as CRM systems, capable of integrating various administrative functions, providing end-to-end analytics and automating repetitive processes. This not only increases the accuracy and transparency of management, but also allows educational institutions to focus

on the main goal – the quality of the educational process. The second key thesis is the relevance of the transition to CRM solutions in the educational sector both globally and nationally. Despite India being one of the largest digital solutions and CRM providers in the world, the level of implementation of these technologies in the country itself – especially in the school segment – remains low. The main and most practical conclusion is related to the analysis of a specific case – Podar Education Network, a large school network with more than 250,000 students. Based on empirical data obtained from three key schools in the network, numerous errors were recorded in the management of student data, payment calculations, scheduling and organization of transfers between schools. All the identified issues fit into a clear structure of primary and secondary management challenges, where the former relate to operational inefficiencies, and the latter to strategic blindness. This analysis not only confirms the relevance of the research topic, but also demonstrates that the implementation of a centralized CRM system in PEN is not just a matter of modernization, but a critical step for sustainable development and ensuring the quality of education at the level of the entire network.

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