

TITLE OF PROJECT REPORT
**CUSTOMER RELATIONSHIP
MANAGEMENT**

Submitted by

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Certified that this project report “**CRM(CUSTOMER RELATIONSHIP MANAGEMENT)**” is the bonafide work of “**ADITYA PARTAP SINGH**” who carried out the project work under supervision of **Ms. AMBIKA**.

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INTERNAL EXAMINER

EXTERNAL EXAMINER

● Introduction:

Customer Relationship Management (CRM) is a strategic approach organizations use to manage and improve interactions with current and potential customers. It involves using technology and data to understand customer behavior, preferences, and needs, ultimately aiming to enhance customer satisfaction, loyalty, and drive business growth. CRMs centralize customer data from various sources, making it accessible to different teams for better communication and collaboration.

● Aim:

● Customer Experience:

CRM aims to enhance the overall customer experience by providing better communication, personalized interactions, and improved service.

● Drive Sales and Revenue:

By better understanding customer needs and behaviors, CRM helps businesses generate more sales and increase revenue.

● Improve Operational Efficiency:

Automating tasks and streamlining processes through CRM leads to increased efficiency and reduced costs.

● Data Management and Analytics:

CRM provides a centralized platform for managing customer data, enabling businesses to analyze customer behavior and make informed decisions.

● Retain Customers:

By fostering stronger relationships and providing excellent service, CRM helps businesses retain customers and reduce churn.

● Objectives:

The objectives of the project are as follows:

The primary objectives of Customer Relationship Management (CRM) are to improve customer relationships, enhance business performance, and ultimately drive customer satisfaction and loyalty. This involves managing and analyzing customer interactions, improving customer service, boosting sales, and retaining existing customers.

Here's a more detailed breakdown of CRM objectives:

1. Improve Customer Relationships:

- **Centralized Customer Information:**

CRMs centralize all customer-related data, including interactions, purchases, and preferences, making it easily accessible to all team members.

- **Personalized Service:**

By understanding individual customer needs and preferences, CRMs enable personalized interactions and service, leading to higher customer satisfaction.

- **Enhanced Communication:**

CRMs facilitate better communication between the business and its customers, ensuring a consistent and seamless experience across all channels.

2. Enhance Business Performance:

- **Increased Sales:**

CRM systems help sales teams manage leads, track opportunities, and close deals more efficiently, leading to increased sales revenue.

- **Improved Marketing:**

CRM data can be used to target marketing campaigns, personalize messages, and measure the effectiveness of marketing efforts.

- **Enhanced Customer Retention:**

By understanding customer behavior and preferences, businesses can implement strategies to retain existing customers and increase their lifetime value.

- **Operational Efficiency:**

CRM can automate tasks, streamline processes, and improve collaboration, leading to greater operational efficiency and cost savings.

1. StepsInvolved:

1. Generate brand awareness

The first step in acquiring new customers is to introduce them to your business. The Marketing team generally takes on this task using a number of measures:

- **1. Learning about your target audience:** Marketers will conduct research to identify their audience's target demographics, interests, preferred channels of communication, what messaging they respond most to and what they care about.
- 2. **Segmenting your target audience:** Audience personas are created to segment a brand's target audience into similar groups based on similar interests or demographics. This helps marketers identify which types of people are most likely to become customers and who their campaigns should target.
- 3. **Creating marketing campaigns that speak to the target demographics:** A/B tests and marketing automation can be used to identify what works and what does not, to create unique campaigns for unique customer segments such as on social media or email and to create strategies for lead acquisition.

When it comes to completing these steps, CRM software contains a wealth of information. The tool can show patterns in past leads and customers to give marketing teams a clear picture of their target audience. Beyond understanding similarities in demographics, marketers can also analyse sales notes in their CRM technology to understand what led to conversions in the past. By understanding what resonated with leads, marketers are better equipped to create effective campaigns.

2. Acquire leads

Introducing your brand to a potential customer is just the beginning of the CRM process. From there, you have to encourage them to learn more about your business and engage with it.

Depending on how your company is structured, this lead acquisition step could be a marketing or sales team responsibility — or both. Your marketing team, for example, might encourage website visitors to share their email with a newsletter signup CTA or a social media giveaway. Sales, on the other hand, could use their [CRM system to set up live chat](#) on your site. With this feature, your team can proactively reach out to potential customers who land on your website.

If your CRM technology comes equipped with a lead enrichment tool, like [Reach](#), lead acquisition is unbelievably simple. All the tool needs is a lead's email address to instantly reveal detailed information about the person. With customer data, you can personalise your outreach with the lead to start the relationship off on the right note. Not to mention, you can save tons of time by not needing to research leads yourself.

3. Convert leads into customers

You have successfully engaged with your leads and they are interested. Now it is time to turn those leads into customers.

To do so, sales reps must first be skilled at identifying how interested leads are and, specifically, whether they are interested enough to make a purchase. A CRM is very helpful here. The historical data from past successful sales can be used to identify lead-qualification criteria. These criteria can be added as “attributes” to your CRM’s lead-scoring tool to help reps identify opportunities with the highest probability of a sale.

If leads do seem likely to make a purchase, reps must then be able to nurture them further and build their trust enough to convert. One way to do this is for reps to send leads case studies, white papers and other resources that may sway their decision.* *

Reps should also use their CRM platform to set reminders and tasks to follow up with interested leads. After all, studies have shown that “63% of consumers need to hear a company’s claim 3-5 times before they actually believe it.” Use your CRM’s dashboard to help you remember to follow up to ensure that no opportunities are missed.

4. Provide superior customer service

You have successfully converted your lead into a customer. Great! But the CRM process does not end when a customer converts. In order to grow as a company, you need to retain customers. How do you keep the customer coming back? With excellent service from Support.

According to Zendesk’s 2020 Customer Experience Trends Report, customer service is the biggest factor that determines a consumer’s loyalty to a brand. Conversely, poor customer service can cost you customers and negatively impact your reputation. Support teams must be able to deliver superior support whenever, wherever, and however their customers expect it.

Forty-nine percent of customers say being able to resolve their issue quickly is the most important aspect of a good customer service experience. With CRM software, support agents can easily access the historical customer information they need to resolve a ticket quickly.

Fifty-seven percent of customers expect to have a choice of channels when reaching out to customer support. CRM features allow support agents to not only provide omnichannel support but also manage those conversations in a single, unified view.

With the right CRM, your agents have the customer information and resources they need to resolve a customer’s issues quickly and effortlessly. This allows for a stress-free and efficient experience for both the customer and the support agent.

5. Drive upsells

When we think of a returning customer, we imagine a shopper continually coming back to the same business to buy the products they know and love. But there is another key way existing customers provide value — by upgrading to more expensive products.

How do you convince customers to switch products? Personalised recommendations via email are a great place to start. You can use your CRM to organize customers into smart lists based on similar purchase histories. You can then create custom email templates that send relevant product releases to entire lists of customers at once. This way, you can be sure the promotional deals or releases you send are reaching the people most likely to buy them.

If your business is service-based, you may find upsell opportunities through check-in calls. Set reminders in your CRM to regularly reach out to repeat customers to ask how they are doing and whether there is any way you could improve your service. Their needs may very well have changed since the last time you spoke, and they may be ready for an upsell.

With a CRM process, the customer lifecycle no longer feels abstract. The right CRM enables you to create a deliberate, personalised experience that naturally drives leads through your sales pipeline


