Customer Relationship Management (CRM) System
Practical - 0
Software Engineering Lab
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What is CRM?
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships to grow your business.

A *CRM system* gives everyone — from **sales, customer service, business development, recruiting, marketing,** or any other line of business — a better way to manage the external interactions and relationships that drive success.

Problems of the earlier system :
- More administration means less time for everything else.
- Lots of information but not a common place for storing and accessing it.
- Many clients have many projects but not a proper platform to solve queries and contacts.
- communications can be missed or lost in the flood of information
- Understanding all this data is also a tedious task.

So what does CRM solve?
- Platform for customer relationship management.
- Identify and engage with the right customers.
- Help build a good relationship with the customers.
- Automate daily tasks.

CRM will help in these departments (Key Features) :
- **Marketing :**
  - Multiple marketing strategies to attract customers. These will resonate with your customers.
  - These might include sending various types of emails and posting on social media.
  - Hiring influencers who will help in achieving your goals.

- **Sales :**
  - Empower sellers to engage with customers to understand their needs, and effectively win more deals truly. As the business grows, finding the right prospects and customers with targeted sales strategies becomes easier, resulting in a successful plan of action for the next step in your pipeline.
  - Use of AI to track customer relationships from start to finish and automate sales execution with contextual prompts that deliver a personalized experience and align with the buyer's journey anytime, anywhere.
- **Administration :**
  - Reducing employee tasks and workload.
- **Strategy :**
  - Help build various strategies and predict what the customer will want using previous customer's history.
  - Offer a strategy that the customer will accept.
- **Customer Service & Support :**
  - Crucial department. This system was built upon this idea.
  - Will help in recognizing issues of the customer and will get feedback from the customer.
  - Increase engagement with the customer.
  - The use of chatbots will help this.
    - Customer Service Team won't have to handle calls regarding general issues. If not solved then they can call the team to solve the issue.
  - Conduct surveys to help understand the customer needs and issues.
- **Finance :**
  - Managing the finances of many customers is a tedious job.
  - It includes employee's salaries, expenses of the company, etc.
  - So to manage all these we need a platform that will help to automate these tasks.
- **Project Management :**
  - This will help in managing all the tasks related to a project.
  - Examples: Work Completed, deadlines, information / MOMs.
  - Scheduling of meetings and task submission can also be done.
  - All information about the project like :
    - Name of employees working on the project.
    - Work of each employee.

■ Duration of the project.

- **Workflow Automation :**
  - Process streamlining.
  - Notifications and alerts can also be employed to ensure that staff remain informed of task progress, deadlines, or changes to the workflow.
  - Specific triggers or events should be used to automate certain tasks and inform the necessary sales representatives of relevant developments.

- **HR :**
  - Keep a check on the health of employees and relationships between employees. This directly affects the reputation of the company.
  - Administration of sick leaves.
  - Ensure a good working environment that follows the COCs and ethics of the company.

Additional Features:
- **Integration:**
  - Integration with Gmail/Outlook.
  - Prediction of company profits.
- **Platform Independence:**
  - Accessibility on mobiles and laptops.
- **AI and Tools:**
  - In this new age of AI, we can make use of various technologies to automate our work so that it helps the company.

Examples where CRM is used
Apple CRM :
They use Apple ID which helps in accessing all Apple Services like Music, Apple TV, etc. Therefore they can target customers and recommend them based on their searches.

Amazon CRM :
customer data during purchases to instantly customize users' online experience.