

# IMPLEMENTING CRM FOR RESULT TRACKING OF

## CANDIDATES WITH INTERNAL MARK

### 1. INTRODUCTION:

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#### 1.1 Overview:

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth

They allow businesses to learn more about their target audiences and how to best cater for their needs, thus retaining customers and driving sales growth. CRM may be used with past, present or potential customers..

CRM stands for Customer Relationship Management, and it's a technology for managing and supporting customer relationships. CRM technology helps companies build and grow customer relationships across the entire customer lifecycle.

The beginnings of CRM as we know it started in the 1980s. Robert and Kate Kestnbaum were pioneers of database marketing. Which was a form of direct marketing that analysed the customer database statistically to identify which customers would be most likely to react to a marketing campaign?

The CRM cycle involves marketing, customer service and sales activities. It starts with outreach and customer acquisition and ideally leads to customer loyalty. There are five key stages in the CRM cycle: Reaching a potential customer. Customer acquisition

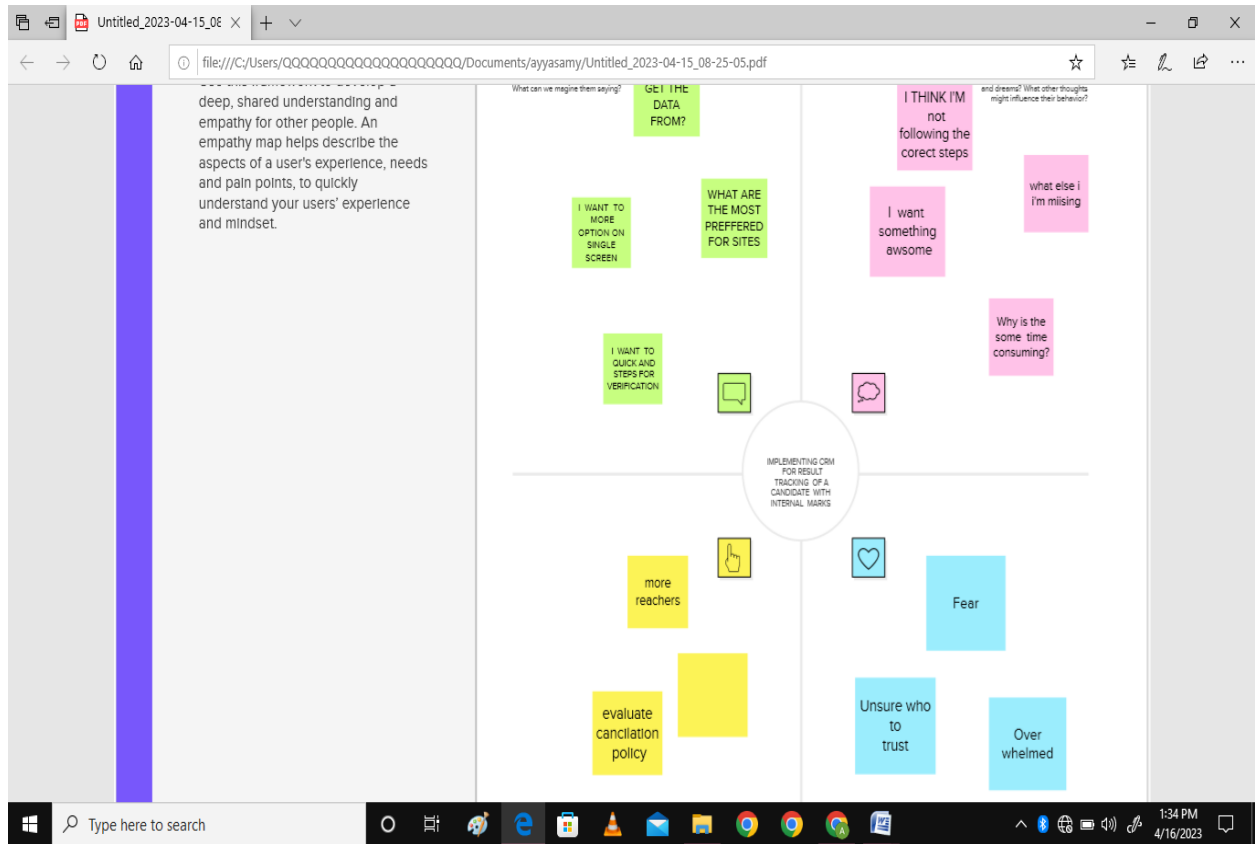
#### 1.2.PURPOSE:

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. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability

Basically, it helps nurture relationships with customers for long-term sales. Although the underlying principle in CRM is not to squeeze out more profits but to make customers happy, which in turn results in product loyalty and more revenues for the business.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy map:



## 2.2 Ideation & Brainstroming Map:

Write down any ideas that come to mind that address your problem statement.

10 minutes

**TIP**  
You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

**Person 1**

|   |                    |                     |
|---|--------------------|---------------------|
| faculty name  | semester mark      | student information |
| they could make you miss well qualified application | candidate validity | course details      |
| they could save item                                |                    |                     |

**Person 2**

|                     |          |   |
|---------------------|----------|---|
| improved confidence | learning | assessment                              |
| etification         | programs | in action between teaching and learning |
|                     |          |   |

**Person 3**

|                 |                       |           |
|-----------------|-----------------------|-----------|
| Data base       | application of skills | knowledge |
| time limitation | student performance   |           |
|                 |                       |           |

**Person 4**

|                                    |                                     |                                       |
|------------------------------------|-------------------------------------|---------------------------------------|
| the information management process | technology process and organization | the multi-channel integration process |
|                                    |                                     |                                       |
|                                    |                                     |                                       |

**3 Group Ideas**  
Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.  
20 minutes

**4 Prioritize**  
Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.  
20 minutes

**TIP**  
You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

**TIP**  
Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as they come within your mind.

**Person 3**

|                 |                       |           |
|-----------------|-----------------------|-----------|
| Data base       | application of skills | knowledge |
| time limitation | student performance   |           |
|                 |                       |           |

**Person 4**

|                                    |                                     |                                       |
|------------------------------------|-------------------------------------|---------------------------------------|
| the information management process | technology process and organization | the multi-channel integration process |
|                                    |                                     |                                       |
|                                    |                                     |                                       |

**Person 7**

|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |
|  |  |  |

**Person 8**

|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |
|  |  |  |

they make you miss well-qualified application

Interaction between teaching and learning

right product your company

the information management process

they could

**Importance**  
If each of these teams could get above difficult and difficulty or task, which would have the most positive impact?

improvement confidence



### 3. RESULT

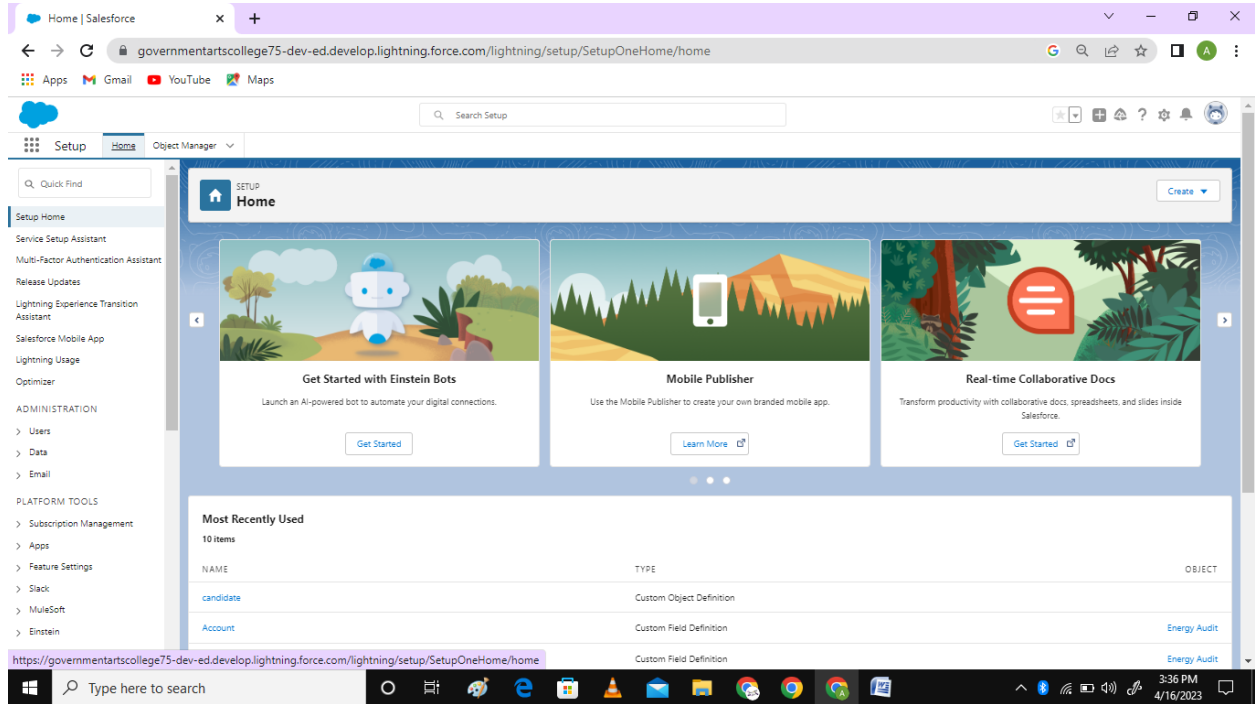
#### 3.1 Data model

| OBJECT NAME    | FIELD IN THE LABLE |           |
|----------------|--------------------|-----------|
| Semester       | FIELD LABLE        | DATA TYPE |
|                | Semester name      | text      |
|                | course             | lookup    |
| candidate      | Candidate name     | text      |
|                | Candidate ID       | Text      |
|                | Semester Name      | Text      |
|                | Internal result    | Lookup    |
| Course details | Course name        | text      |
|                | Course ID          | Text      |

|                  |  |               |      |               |      |           |      |        |        |
|------------------|--|---------------|------|---------------|------|-----------|------|--------|--------|
| Lecturer details | <table><tr><td data-bbox="812 241 1105 359">Lecturer role</td><td data-bbox="1105 241 1448 359">Text</td></tr><tr><td data-bbox="812 359 1105 476">Lecturer name</td><td data-bbox="1105 359 1448 476">Text</td></tr><tr><td data-bbox="812 476 1105 619">Course ID</td><td data-bbox="1105 476 1448 619">Text</td></tr><tr><td data-bbox="812 619 1105 774">course</td><td data-bbox="1105 619 1448 774">Lookup</td></tr></table> | Lecturer role | Text | Lecturer name | Text | Course ID | Text | course | Lookup |
| Lecturer role    | Text   |               |      |               |      |           |      |        |        |
| Lecturer name    | Text   |               |      |               |      |           |      |        |        |
| Course ID        | Text   |               |      |               |      |           |      |        |        |
| course           | Lookup   |               |      |               |      |           |      |        |        |
| Internal results | <table><tr><td data-bbox="812 835 1118 930">Candidate ID</td><td data-bbox="1118 835 1448 930">Text</td></tr><tr><td data-bbox="812 930 1118 1068">Course ID</td><td data-bbox="1118 930 1448 1068">Text</td></tr><tr><td data-bbox="812 1068 1118 1218">Marks</td><td data-bbox="1118 1068 1448 1218">text</td></tr></table>  | Candidate ID  | Text | Course ID     | Text | Marks     | text |        |        |
| Candidate ID     | Text   |               |      |               |      |           |      |        |        |
| Course ID        | Text   |               |      |               |      |           |      |        |        |
| Marks            | text   |               |      |               |      |           |      |        |        |

### 3.2 Activity & screenshot:

#### MILESTONE -01:



## MILESTONE -02:

The screenshot shows the Salesforce Object Manager interface for the 'Account' object. The 'Fields & Relationships' section is active, displaying a list of 33 fields sorted by Field Label. The interface includes a left-hand navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', and 'Lightning Record Pages'. The main content area shows a table with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The table lists various fields such as Account Name, Account Number, Account Owner, Account Site, Account Source, Active, Annual Revenue, Billing Address, Clean Status, Created By, Customer Priority, D&B Company, and D-U-N-S Number.

| FIELD LABEL       | FIELD NAME          | DATA TYPE           | CONTROLLING FIELD | INDEXED |
|-------------------|---------------------|---------------------|-------------------|---------|
| Account Name      | Name                | Name                |                   | ✓       |
| Account Number    | AccountNumber       | Text(40)            |                   |         |
| Account Owner     | OwnerId             | Lookup(User)        |                   | ✓       |
| Account Site      | Site                | Text(80)            |                   |         |
| Account Source    | AccountSource       | Picklist            |                   |         |
| Active            | Active__c           | Picklist            |                   |         |
| Annual Revenue    | AnnualRevenue       | Currency(18, 0)     |                   |         |
| Billing Address   | BillingAddress      | Address             |                   |         |
| Clean Status      | CleanStatus         | Picklist            |                   | ✓       |
| Created By        | CreatedById         | Lookup(User)        |                   |         |
| Customer Priority | CustomerPriority__c | Picklist            |                   |         |
| D&B Company       | DandbCompanyId      | Lookup(D&B Company) |                   | ✓       |
| D-U-N-S Number    | DunsNumber          | Text(9)             |                   |         |



Tabs | Salesforce

governmentartscollege75-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Apps Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

SETUP Tabs

Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

| Action                                     | Label                            | Tab Style  | Description |
|--|----------------------------------|------------|-------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">candidates</a>       | Computer   |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">course details</a>   | Flag       |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">Energy Audits</a>    | Heart      |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">internal result</a>  | Bottle     |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">lecturer Details</a> | Cell phone |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">semesters</a>        | Diamond    |             |

Web Tabs

New What Is This?

No Web Tabs have been defined

MILESTONE -03:



## MILESTONE -04:

Users | Salesforce

governmentartscollege75-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings

Users

- Feature Settings
- Data.com
- Prospector Users

Didn't find what you're looking for? Try using Global Search.

### All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

| Action  | Full Name          | Alias   | Username   | Role | Active | Profile                          |
|---|--------------------|---------|--|------|--------|----------------------------------|
| <input type="checkbox"/> <a href="#">Edit</a> | Chatter_Evangelist | Chatter | chatter_00q2w00000r8c7ead-n02a11suzim@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <input type="checkbox"/> <a href="#">Edit</a> | martin_john        | john    | johnmartin@thesmartbridge.com                                |      | ✓      | Custom Sales Profile             |
| <input type="checkbox"/> <a href="#">Edit</a> | S_Avvaasamy        | AS      | avvasamy@math.com  |      | ✓      | System Administrator             |
| <input type="checkbox"/> <a href="#">Edit</a> | User_Integration   | intey   | integration@00q2w00000r8c7ead.com                            |      | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/> <a href="#">Edit</a> | User_Security      | sac     | insightsecurity@00q2w00000r8c7ead.com                        |      | ✓      | Analytics Cloud Security User    |

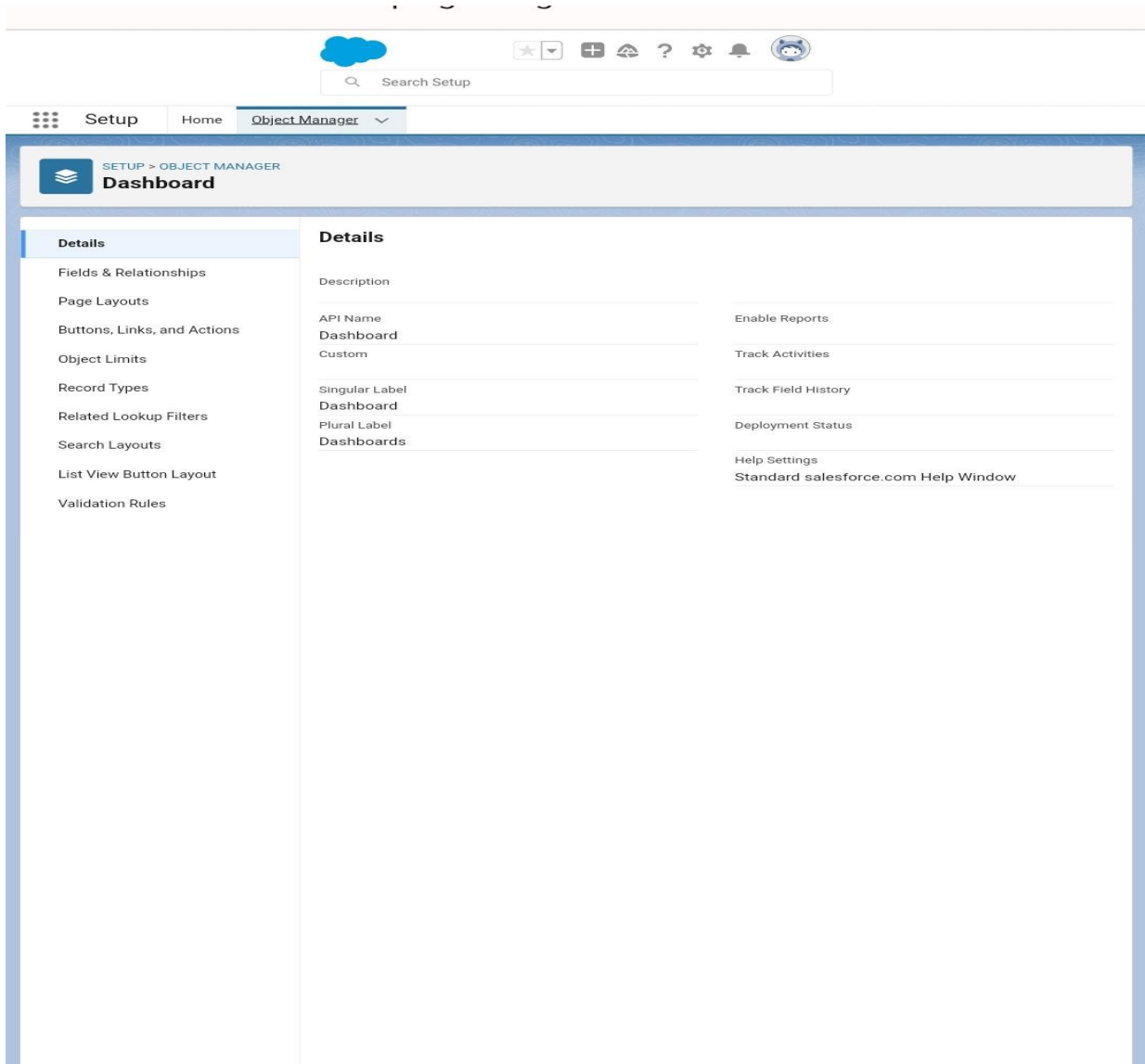
[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

https://governmentartscollege75-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home

Type here to search

3:51 PM 4/16/2023

MILESTONE -05:



## MILESTONE -06:

Create Report

| Category                         | Select a Report Type                                |
|----------------------------------|---|
| Recently Used                    | <input type="text" value="Search Report Types..."/> |
| All                              | <b>Report Type Name</b>                             |
| Accounts & Contacts              | Accounts  |
| Opportunities                    | Contacts & Accounts                                 |
| Customer Support Reports         | Accounts with Partners                              |
| Leads                            | Account with Account Teams                          |
| Campaigns                        | Accounts with Contact Roles                         |
| Activities                       | Accounts with Assets                                |
| Contracts and Orders             | Contacts with Assets                                |
| Price Books, Products and Assets | Account History                                     |
| Administrative Reports           | Contact History                                     |
| File and Content Reports         | D&B Company with and without Accounts               |
| Individuals                      | Opportunities                                       |
| Other Reports                    | Opportunities with Products                         |
| Hidden Report Types              | Opportunities with Contact Roles                    |
|                                  | Opportunities with Partners                         |
|                                  | Opportunities with Competitors                      |
|                                  | Opportunity History                                 |
|                                  | Opportunity Field History                           |
|                                  | Opportunity Trends                                  |
|                                  | Opportunities with Contact Roles and Products       |

### 4. Trailhead Profile Public URL:

Team head: <https://trailblazer.me/id/jjana8616>

Team member 1: <https://trailblazer.me/id/gowthamgtm28>

Team member 2: <https://trailblazer.me/id/gokuv20>

Team member 3: <https://trailblazer.me/id/ayyasamy3>

## *5. ADVANTAGES & DISADVANTAGE :*

A CRM can help you identify customer needs, track feedback, and manage your customer service improvements. The reporting features also allow you to track customer metrics from several different sources, such as help desk metrics, customer satisfaction scores, and more. Certain businesses where customer transactions are highly standardised may not benefit from a CRM system. A CRM system works best where personalisation is required in client/company interactions and where there are multiple touch-points over time between the client and the business across departments.

The advantages of a CRM system are available to salespeople, marketing teams, customer service professionals, and anybody who interacts with customers in large and small organisations.

## *6. APPLICATIONS :*

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. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability. CRM can analyze data and generate reports whenever required. There are mainly three types of CRM applications – Operational, Analytical and Collaborative to perform all these activities. Web CRM applications are excellent as an add-on service to your desktop application. As such, you will certainly use them when you can not use your own computer or phone. At the same time, they can be used in companies where most employees work with Outlook, but some of them prefer .

## *7. CONCLUSION:*

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs

Customer profitability analysis allows you to segment your customers by their profit contribution to your brand and optimize your marketing, customer service, and operations costs around the customer segments who are the most profitable for your brand.

## *8. FUTURE SCOPE:*

With the help of a CRM system, companies solve sales problems, increase the productivity of employees, and regularly monitor important financial indicators. According to EPCGroup's analytics, CRMs exploded in 2022, achieving an 11.6% CAGR from 2022 to 2027. Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business. Report Overview. The global customer relationship management market size was valued at USD 58.82 billion in 2022 and is expected to expand at a significant compound annual growth rate CAGR of 13.9% from 2023 to 2030