

The background features abstract, overlapping green geometric shapes, primarily triangles and polygons, in various shades of green, creating a modern and dynamic visual effect.

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

Introduction

► 1.1. OVER VIEW

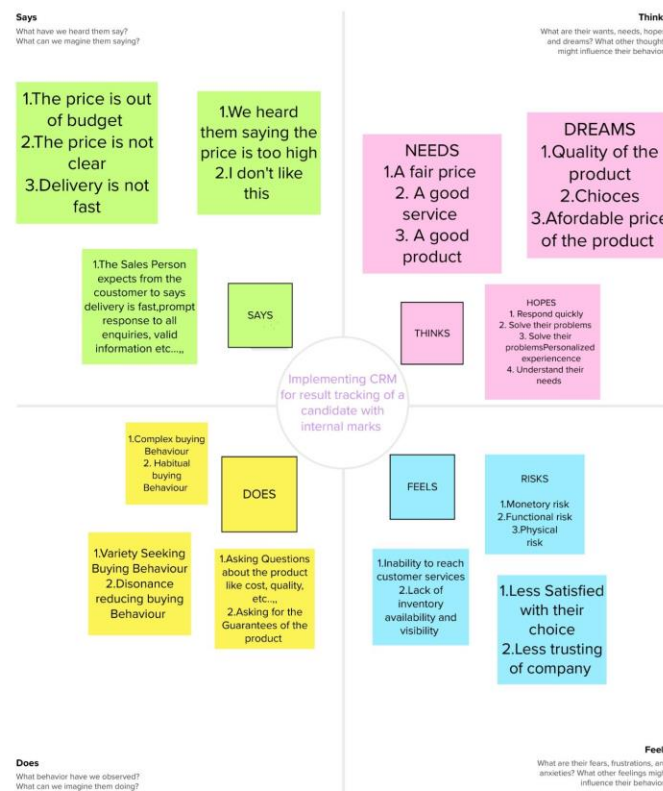
- CRM implementation is the process of introducing a CRM system to your business. It starts from choosing the right solution to your needs, and ends with actively using it to streamline your business processes. However may be that's an overly - simplified account; implementation is a multi stage process.
- Administrator should be able to create all base data including semester, candidate, course and lecturer. Lecturer should have the ability to create internal results. Dean, who is one of the lecturer, should be the only one with ability to update internal results. Re -evaluation can be initialised by candidate for all internal results. Now only Dean can update marks after re evaluation.

1.2 . PURPOSE

- ▶ A CRM can help you store customer data such as user behaviour, how long a customer has been with your business , purchase records , and notes on sales interactions, which you can use to optimise your sales and marketing process and improve customer service across your organisation.

2. PROBLEM DEFINITION AND DESIGN THINKING

► 2.1. EMPATHY MAP



2.2.IDEATION AND BRAINSTORMING MAP



OBJECT	FIELD NAME	DATA TYPE
1. Semester 2. Candidate 3. Course details 4. Lecturer details 5. Internal marks	Semester name Candidate name Course ID Lecturer ID Candidate marks	Text Text Text Text Text

ACTIVITY -1. OBJECT

The screenshot shows the Salesforce Object Manager setup page for a custom object named 'candidate'. The browser tabs include 'Student', 'Login | Salesforce', 'Home | Salesforce', and 'candidate | Salesforce'. The URL is 'governmentartscollegecoim-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000bb1F/Details/view'. The page header shows 'Setup > OBJECT MANAGER' and 'candidate'. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area displays the following details for the 'candidate' object:

Field	Value
Description	list of candidates applying for exam
API Name	candidate__c
Custom	✓
Singular Label	candidate
Plural Label	candidates
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The Windows taskbar at the bottom shows the search bar, taskbar icons, and system tray with the time 20:55 and date 14-04-2023.

LECTURER DETAILS

The screenshot shows the Salesforce Object Manager interface for the 'candidate' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 6 items sorted by Field Label. The table below lists the fields with their labels, names, data types, controlling fields, and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
candidate name	candidate_name__c	Text(13)		
candidate Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Text(18)		

The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates 02:30 PM on 15-04-2023.

INTERNAL MARKS

The screenshot shows a web browser with multiple tabs. The active tab is 'Internal | Salesforce', displaying the Salesforce Object Manager setup page for an object named 'Internal'. The browser's address bar shows the URL: `governmentartscollegecoim-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000bb0l/Details/view`. The page header includes a 'Search Setup' bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER Internal'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Details' section is currently selected, showing the following information:

- Description: Internal marks for semester exam
- API Name: Internal__c
- Custom: ☒
- Singular Label: Internal
- Plural Label: Internals
- Enable Reports: ☒
- Track Activities: ☐
- Track Field History: ☐
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

The Windows taskbar at the bottom shows the search bar, task view button, and several application icons. The system clock indicates the time is 20:56 on 14-04-2023.

2. FIELDS AND RELATIONSHIP

The screenshot shows the Salesforce Object Manager interface for the 'candidate' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
candidate name	candidate_name__c	Text(13)		
candidate Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name__c	Text(18)		

The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates the time is 02:30 PM on 15-04-2023.

3.USERS

The screenshot displays the Salesforce Setup interface for managing users. The left sidebar shows the navigation menu with 'Users' selected. The main content area shows the 'User Detail' for John Martin, including fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. The right side of the detail view shows the Role, User License, Profile, and various user permissions.

Setup Users

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#)

Name	John Martin	Role	
Alias	jmart	User License	Salesforce
Email	gg2540286@gmail.com	Profile	Standard User
Username	gg2540286@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812756715195313765	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i

Windows taskbar: Type here to search, 00:05, 15-04-2023

4.CANDIDATE CARD APP

The screenshot shows the Salesforce Lightning App Builder interface for a Lightning app named 'Candidate Result Card'. The browser address bar shows the URL: `governmentartscollegecoim-c-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u5i000000Nk63AAC&retUrl=https%3A%2F%2Fgovernmentar...`. The interface includes a top navigation bar with 'Lightning App Builder', 'App Settings', 'Pages', and 'Candidate Result Card'. The 'App Settings' section is active, with 'App Details & Branding' selected in the left sidebar. The main content area is divided into 'App Details' and 'App Branding' sections. The 'App Details' section contains fields for 'App Name' (Candidate Result Card), 'Developer Name' (candidate_result_card), and 'Description' (Enter a description...). The 'App Branding' section includes an 'Image' upload button, a 'Primary Color Hex Value' field (set to #72E4DE), and 'Org Theme Options' with a checkbox for 'Use the app's image and color instead of the org's custom theme'. An 'App Launcher Preview' at the bottom shows a teal square with 'CR' and a grey rectangle with 'Candidate Result Card'. The Windows taskbar at the bottom shows the search bar, task view button, and several open applications including File Explorer, Edge, and Chrome. The system clock indicates 00:07 on 15-04-2023.

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ
Candidate Result Card

*Developer Name ⓘ
candidate_result_card

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#72E4DE

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

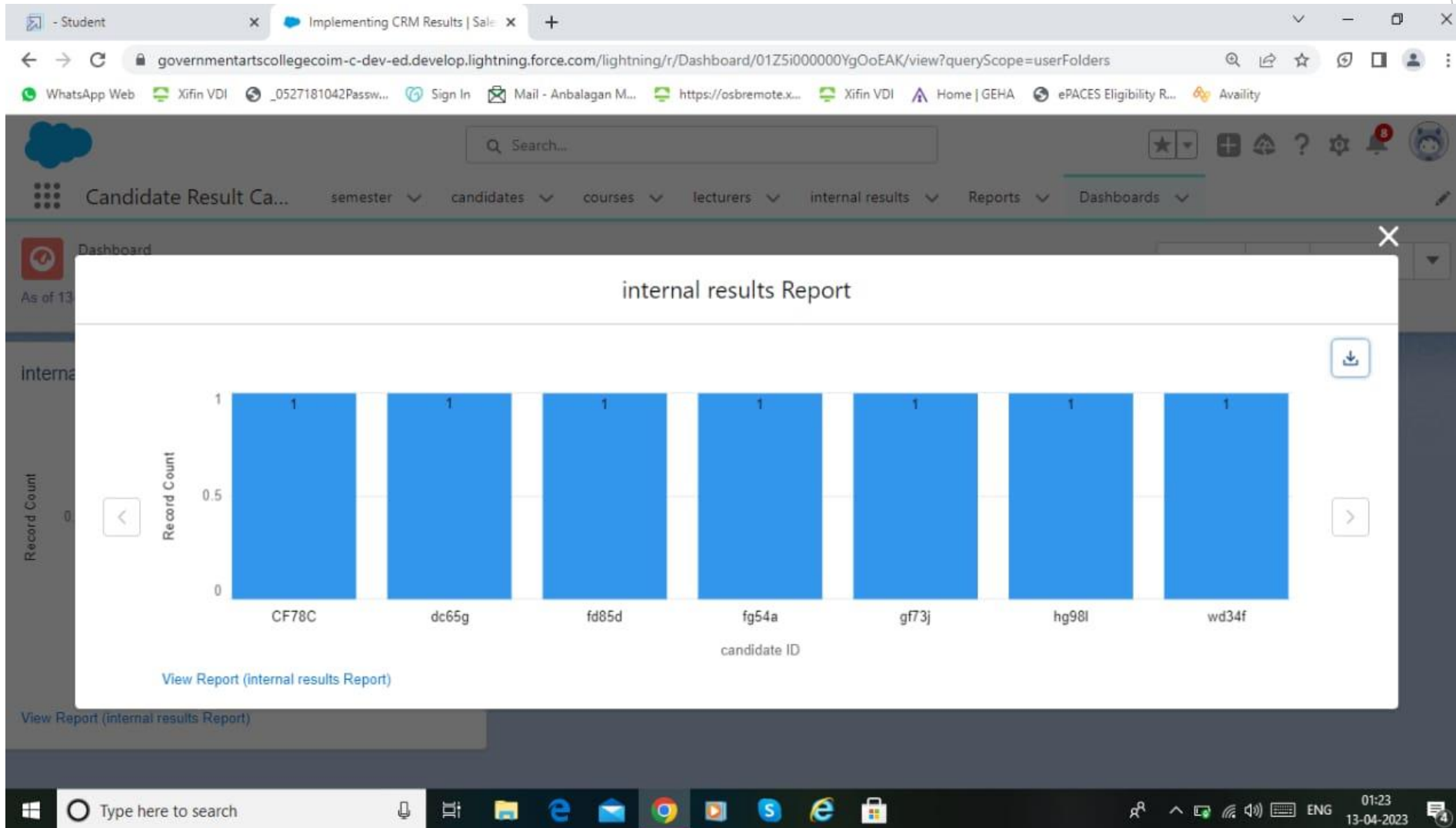
CR Candidate Result Card

5.REPORTS

The screenshot displays the Salesforce Reports page. The browser address bar shows the URL: `governmentartscollegecoim-c-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The Salesforce navigation bar includes a search bar and a menu with options like 'Candidate Result Ca...', 'semester', 'candidates', 'courses', 'lecturers', 'internal results', 'Reports', and 'Dashboards'. The 'Reports' section is active, showing a 'Recent' list of 3 items. A table lists these reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are 'New semester Report', 'internal results Report', and 'Candidate', all created by 'GAYATHRI S' on 13/4/2023. A left sidebar contains navigation links for 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'FOLDERS' (All Folders, Created by Me, Shared with Me). The Windows taskbar at the bottom shows the date and time as 01:21 on 13-04-2023.

Report Name	Description	Folder	Created By	Created On	Subscribed
New semester Report		Private Reports	GAYATHRI S	13/4/2023, 1:10 pm	
internal results Report		Private Reports	GAYATHRI S	13/4/2023, 11:15 am	
Candidate		Private Reports	GAYATHRI S	13/4/2023, 10:54 am	

6.RESULT



TRAIL HEAD PROFILE PUBLIC URL

Team lead - <https://trailblazer.me/id/gayathri-050603-s>

Team member 1-

https://trailhead.salesforce.com/today/new_user

Team member 2 - <https://trailblazer.me/id/jesitha-300103-l>

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

ADVANTAGES

- For those who work with a CRM platform, it's hard to imagine a world without it. If you love structure and organisation, an advantage CRM software offers is that it can keep everything related to managing your customer relationships — data, notes, metrics, and more — in one place

A CRM platform helps companies target different audiences, set scores and alerts based on an individual lead or customer's activity, proactively work with contacts, and maintain relationships. Best of all, a CRM system can be used across departments to ensure that all customer-facing teams are empowered with the right data to create incredible customer experiences

The background of the slide features abstract, overlapping green geometric shapes, primarily triangles and polygons, in various shades of green, creating a modern and dynamic visual effect.

► CRM benefits a company in a variety of ways. While the benefits vary by department or industry, six benefits of CRM platforms that affect every user include:

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- Trustworthy reporting
- Dashboards that visually showcase data
- Improved messaging with automation
- Proactive service
- Efficiency enhanced by automation
- Simplified collaboration

6 benefits of CRM software that every user can expect



Polished,
trustworthy
reporting



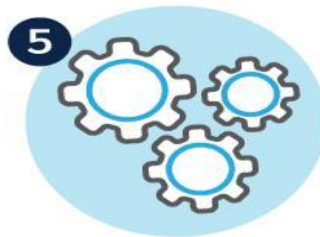
Dashboards
that visually
showcase data



Improved
messaging with
automation



Proactive
service



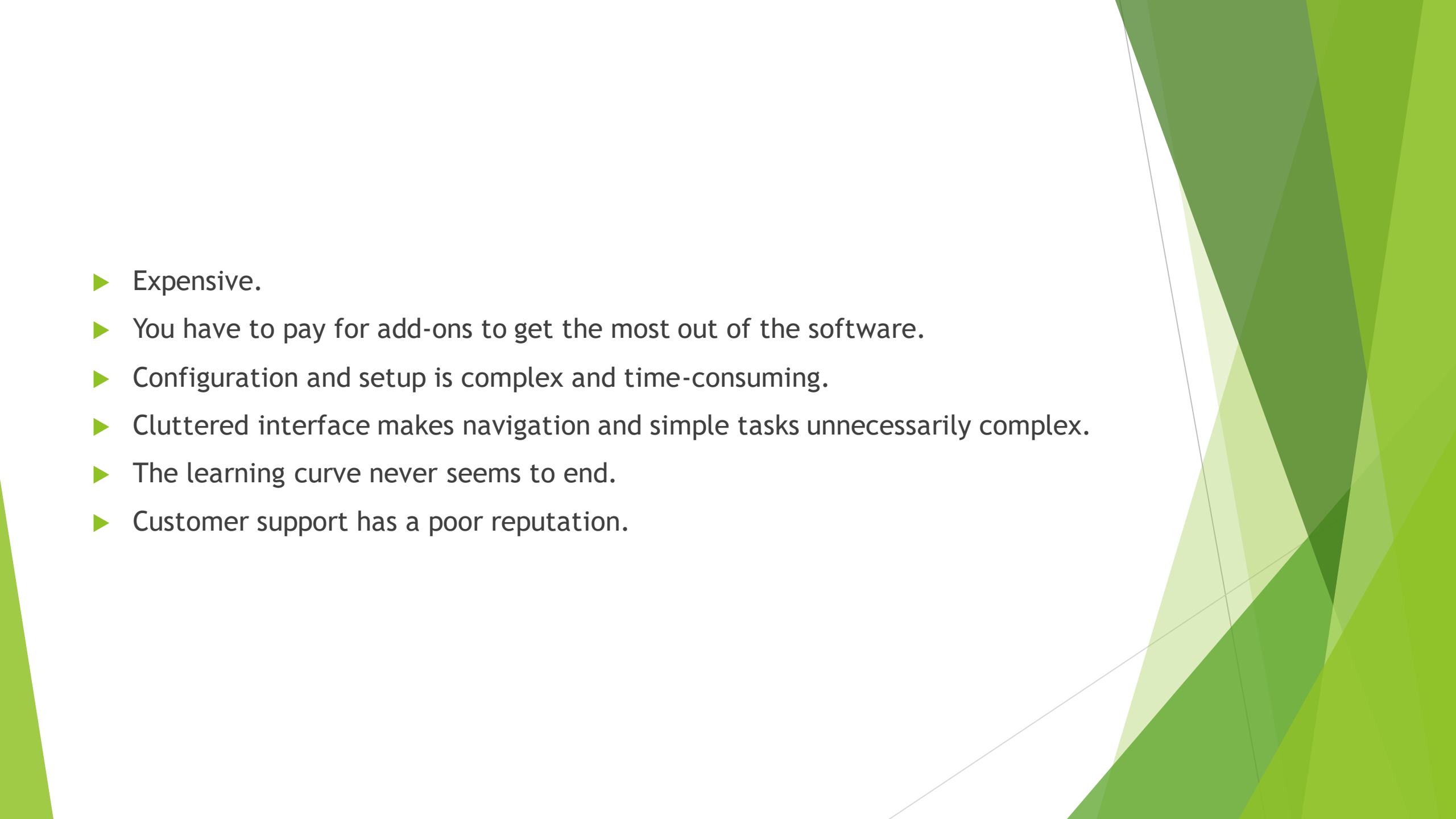
Efficiency
enhanced by
automation



Simplified
collaboration

DISADVANTAGES

- ▶ Potential drawbacks of CRM systems
- ▶ software subscription or purchase fees.
- ▶ Premium upgrades, eg add-on marketing or reporting features.
- ▶ Customisation.
- ▶ IT resources needed.
- ▶ Hardware or software requirements.
- ▶ Staff training and upskilling.


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- The background of the slide features abstract, overlapping green geometric shapes in various shades of green, creating a modern, layered effect on the right side.
- ▶ Expensive.
 - ▶ You have to pay for add-ons to get the most out of the software.
 - ▶ Configuration and setup is complex and time-consuming.
 - ▶ Cluttered interface makes navigation and simple tasks unnecessarily complex.
 - ▶ The learning curve never seems to end.
 - ▶ Customer support has a poor reputation.

APPLICATION

- ▶ Good CRM makes it easy for salespeople to track (and later locate!) records of their activities, share information internally, and keep in touch with their customers.
- ▶ For managers and owners, CRM can help refine the overall sales process, gather important customer data, and analyze the sales trends and metrics that will lead to more informed investment, marketing, and operating decisions.
- ▶ Before businesses get interested in CRM, they usually manage customer relations on spreadsheets, in email chains, and sometimes in a generic shared drive system.
- ▶ This works for a while. But as the sales team grows, it becomes clear that each person on the team has a different method of interacting with customers, closing deals, and tracking communications. With information tracked across different documents and in different ways (or not tracked at all!) things start to get complicated.

CONCLUSION

- ▶ The ultimate goal of the discipline of customer relationship management, and associated CRM systems, is efficiently managing and improving business relationships. There are stages in creating and leveraging customer relationships that break down the entire relationship lifecycle into phases with distinct goals. Each of these five stages plays an integral role in the development of effective sales, service, and marketing goals.
- ▶ Customer Acquisition - Targeting your most profitable customers
- ▶ Customer Retention - Keeping customers interested by offering exceptional products and outstanding customer service
- ▶ Customer Development - Up-selling, cross-selling, and cross channel product development.

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- ▶ This is the last of the project management stages, when the final deliverables are handed over or go live. This stage provides you, your team and stakeholders with an opportunity to evaluate how successful the project was and what lessons were learned during the process.
 - ▶ At the end of the stage, there should be a plan for implementation outlining the tasks required, people responsible and timelines for delivery. An implementation team should be identified to guide the process.

FUTURE SCOPE

- ▶ The world has entered the era of technology of superficial integrated CRM. And while the future of it seems brighter than ever, but along with it, there will be challenges to overcome for effective CRM & its system. In the near future, CRM will be mostly analytical & net-based. More trending technologies of CRM such as data analytics & other matrices will be used to analyze the business performance.
- ▶ Moreover, more user will be benefited due to the linkage of CRM along with social media as it will see more popularity in the coming days. Apart from this, the future CRM will enable its user to exchange data over electronic devices more easily than ever.
- ▶ Not to mention CRM's immense scope of being integrated with multiple other platforms in the future that will boost its functionalities resulting in great progress and development of company & organizational

- ▶ The scope of Salesforce CRM is an obvious concern for many aspiring professionals who are thinking of learning about the tool. According to the December 2021 estimates by Salesforce, it could achieve more than two times its annual revenue and reach the \$50 billion mark by 2026. With a tool that offers a diverse portfolio of services powered by automation, you are less likely to experience any worries with the scope of Salesforce CRM.
- ▶ Could the predictions by Salesforce itself assure you about its prospects? To build your career as a Salesforce professional, you need something more concrete than revenue forecasts. For example, you must know that the growth of Salesforce in the coming years will be evident in the number of companies dependent on Salesforce CRM.
- ▶ More Businesses Use Salesforce
- ▶ Businesses have been turning towards Salesforce for automating various operations, utilizing data to verify business decisions, and reducing the necessity of depending on human intervention.

THANK YOU

done by

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