

1. INTRODUCTION:

1.1 Overview

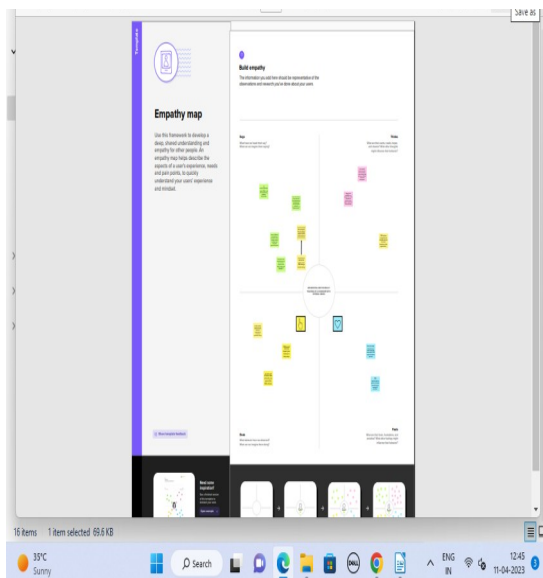
assess the CRM needs and set goals ,choose the correct CRM application.
The process of centralizing all communication between a company and its customer involves a CRM software with feature that match your needs.

1.2 purpose

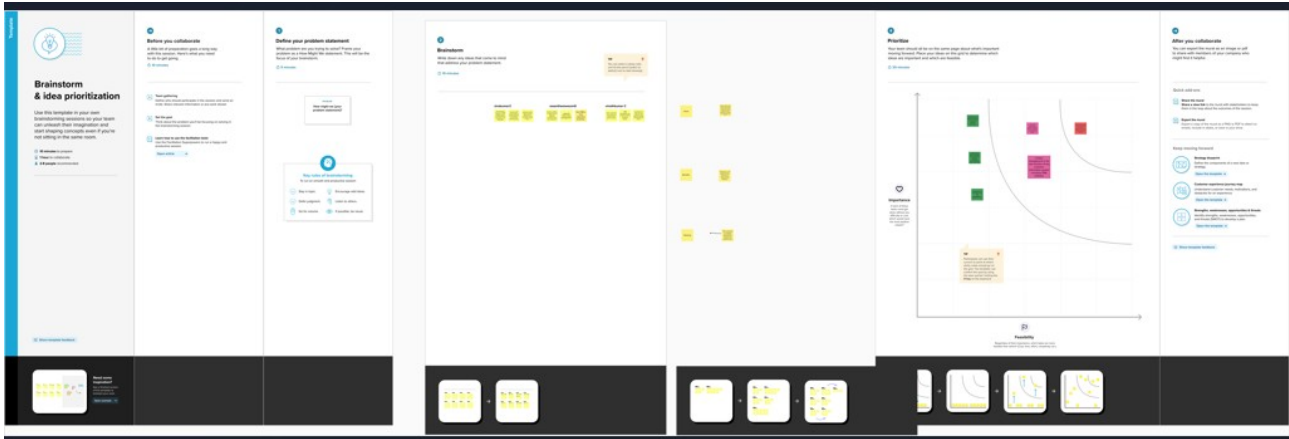
Companies can also use a CRM to expand the scope of (or event change a job function if needed to support business goal. For example, your sales team will use a CRM to manage customers better and sell more.

2. PROBLEM DEFINITION & DESIGN THINKING :

2.1 Empathy map



2.2 Ideation & Brainstorming MAP



RESULT :

3.1 Data model:

| Object name | Field in the object | |
|-------------|---------------------|-----------|
| Obj1 | Field label | Data type |
| | Semester name | Text |
| Obj2 | Field label | Data type |
| | Owner | Look up |

3.2 ACTIVITY & SCREENSHOT

Milestone 1: Sales force


Activity 1:


salesforce login - Yahoo India Se x Sivakumar.C Siva | Salesforce x +


aagacmusuri-dev-ed.develop.lightning.force.com/lightning/r/User/0052w00000FrWhvAAF/view


Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups People More

 **Sivakumar.C Siva** [Edit](#) [User Detail](#)

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(Or at least with your colleagues on Chatter.)*

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Details


| | |
|---|----------------|
| Name | Manager |
| Sivakumar.C Siva | |
| Title | Company Name |
| | AAGACMUSURI |
| Email | Phone |
| sivakumar41408@gmail.com | |
| Address | Mobile |
| IN | +91 9361019277 |
| About Me | |
| Share your awesomeness with the world. (Or at least with your colleagues on Chatter.) | |

Chatter

[Post](#) [Poll](#) [Question](#)


Related


 **Groups (0)**

 **Files (0)**

[Upload Files](#)

Or drop files

 **Followers (0)**

 **Following (0)**

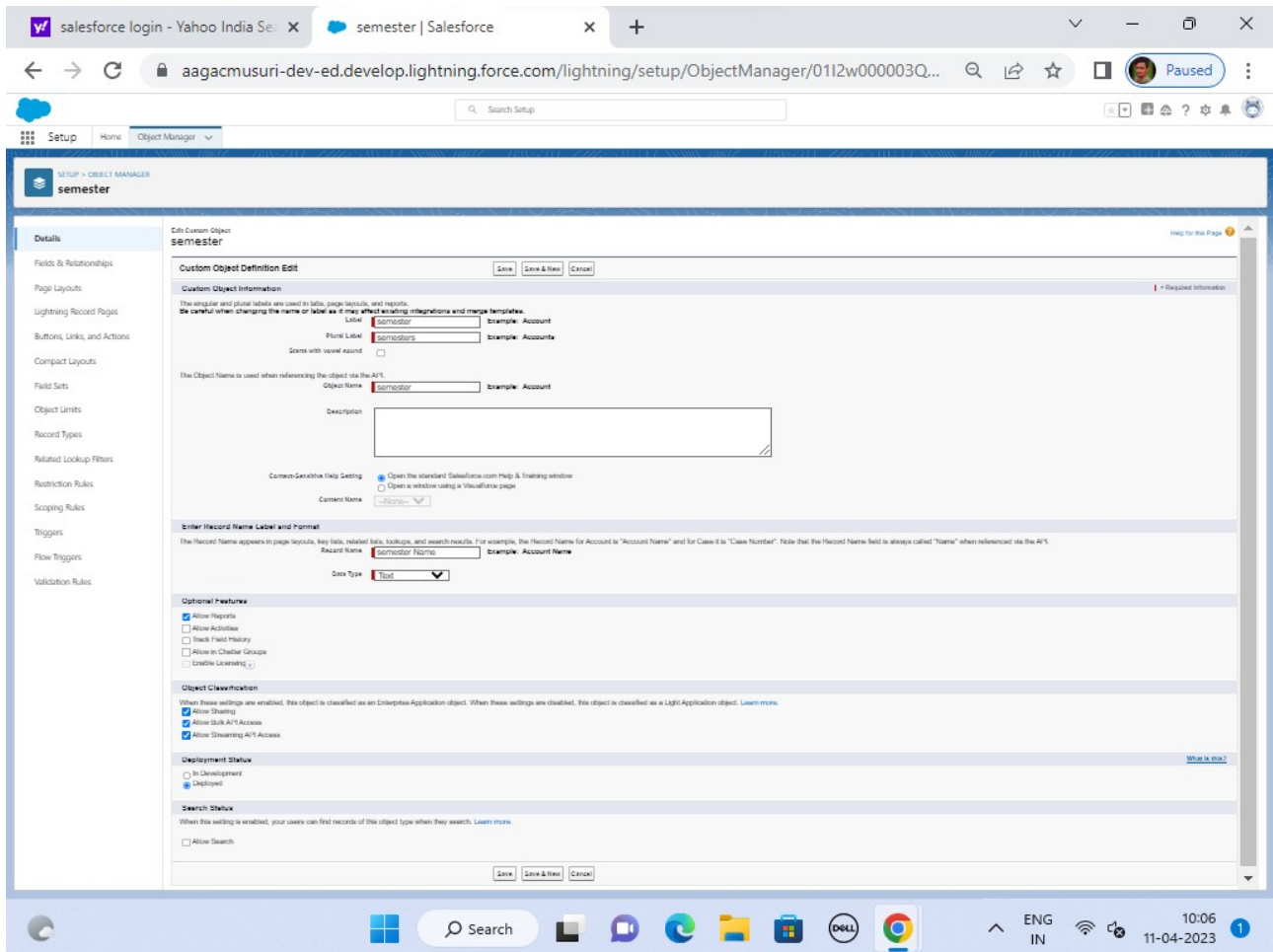
To Do List

Search

ENG IN 10:02 11-04-2023

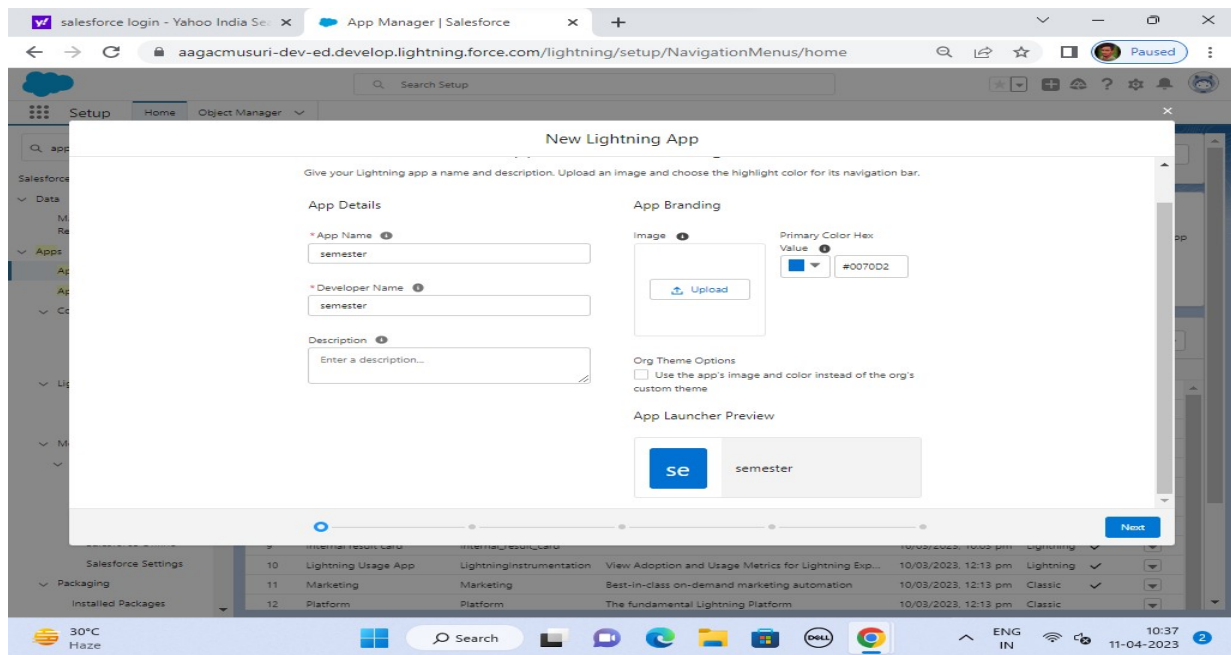
Milestone 2:

Activity 1:



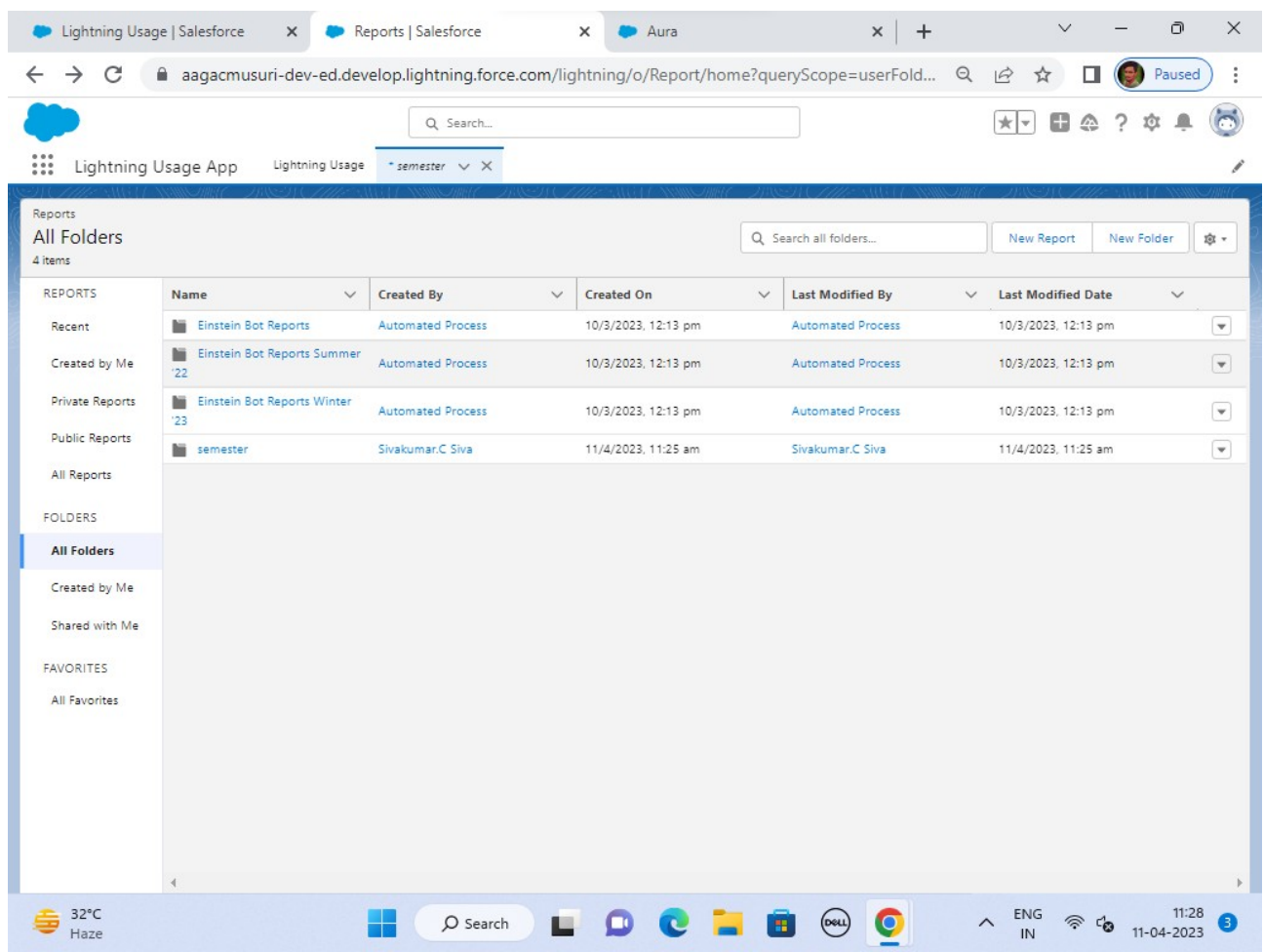
Milestone 3:

Activity 2 :



Milestone 4;

Activity3:



salesforce login - Yahoo India Se: x semester | Salesforce x +

aagacmusuri-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Q...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
semester

Details

Fields & Relationships
4 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User:Group) | | ✓ |
| semester Name | Name | Text(80) | | ✓ |

28°C Partly sunny

Search

ENG IN 10:29 11-04-2023

Milestone 5

Lightning Usage | Salesforce x Report Builder | Salesforce x Loading... x +

aagacmusuri-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvc...

Search...

Lightning Usage App Lightning Usage Reports

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

| Report Type Name | Category |
|---------------------------------------|----------|
| Accounts | Standard |
| Contacts & Accounts | Standard |
| Accounts with Partners | Standard |
| Account with Account Teams | Standard |
| Accounts with Contact Roles | Standard |
| Accounts with Assets | Standard |
| Contacts with Assets | Standard |
| Account History | Standard |
| Contact History | Standard |
| D&B Company with and without Accounts | Standard |
| Opportunities | Standard |
| Opportunities with Products | Standard |
| Opportunities with Contact Roles | Standard |
| Opportunities with Partners | Standard |
| Opportunities with Competitors | Standard |
| Opportunity History | Standard |
| Opportunity Field History | Standard |
| Opportunity Transfers | Standard |

Details

Accounts
Standard Report Type

Start Report

Details

Fields

Created By You

Created By Others

Objects Used in Report Type

32°C Haze

Search

ENG IN 11:22 11-04-2023

Activity 4:

Milestone 6:

Activity 5

The screenshot displays the Salesforce Lightning Usage Reports interface. The browser tabs at the top include 'Lightning Usage | Salesforce', 'Reports | Salesforce', and 'Aura'. The address bar shows the URL: `aagacmusuri-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFold...`. The page title is 'Reports' and the sub-header is 'All Folders'. A search bar is present with the text 'Search all folders...'. There are buttons for 'New Report' and 'New Folder'. The main content area is a table with the following columns: 'Name', 'Created By', 'Created On', 'Last Modified By', and 'Last Modified Date'. The table contains four items:

| REPORTS | Name | Created By | Created On | Last Modified By | Last Modified Date |
|-----------------|---------------------------------|-------------------|---------------------|-------------------|---------------------|
| Recent | Einstein Bot Reports | Automated Process | 10/3/2023, 12:13 pm | Automated Process | 10/3/2023, 12:13 pm |
| Created by Me | Einstein Bot Reports Summer '22 | Automated Process | 10/3/2023, 12:13 pm | Automated Process | 10/3/2023, 12:13 pm |
| Private Reports | Einstein Bot Reports Winter '23 | Automated Process | 10/3/2023, 12:13 pm | Automated Process | 10/3/2023, 12:13 pm |
| Public Reports | semester | Sivakumar.C Siva | 11/4/2023, 11:25 am | Sivakumar.C Siva | 11/4/2023, 11:25 am |

The left sidebar shows a navigation menu with 'All Folders' selected. The bottom of the screen shows a Windows taskbar with the date '11-04-2023' and time '11:28'.

4 Trailhead Profile public URL

Team Lead: javascript:void(0);

Team member1 <https://trailblazer.me/id/vasag10>

Team member 2 <https://trailblazer.me/id/vinos39>

Project Report

ADVANTAGES & DISADVANTAGES

Many successful companies have implemented CRM. However, what features CRM has, and the specific advantages and disadvantages are not yet well known.

One of the reasons is that there are many types of CRM software, SFA, and other similar tools, so there are hurdles in understanding and selecting the right one.

Every business is planned, established, and run on based of its customers. Customers are like the blood of every business, without which business organs can't function. Happy customer reflects the quality and growth of any business. With the evolution of technology, the business also adopts digital platform and start interacting with customers

6 APPLICATIONS

A [customer relationship management \(CRM\)](#) system can be a lifeline for keeping track of all of your customers and attracting new ones. But in order to get the most out of your CRM, it's important to ensure you get the right option for your needs. If you're overwhelmed with the number of options out there, don't fret. Read our comprehensive guide to the different types of CRM applications available and what they can do to boost your company's growth. [Customer relationship management](#) solutions help businesses identify, track, manage and interact with their customers. The goal is reaching more prospects, increasing and accelerating conversion rates and keeping customers satisfied and coming back for more.

We can group the multitude of CRM solutions into three primary types: operational, analytical and collaborative. Each is built to handle specific processes related to managing relationships with customers and storing customer data, like automating sales, marketing and service tasks, identifying and capitalizing on customer trends and more.

Collaborative CRM

Collaborative CRM (a strategic CRM) centralizes customer data where marketing, sales and service professionals can see it. With visibility into all your customer communications, purchase history, service requests, notes and other details, service reps will be better prepared to solve their customers' problems. Collaborative CRMs can even act on this information automatically to expedite service.

There are two major elements of collaborative CRM: interaction marketing CRM setup can help out with that, big time. Any good customer relationship management CRM is built on the principle of better business through overlapping communication, as well as the centralization of tasks and data.

7 CONCLUSION

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. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion.

8 FUTURE SCOPE:

Customers are fundamentally changing, and it goes beyond simple demographics. There's a change in how all customer segments across Business-to-Business (B2B) and Business-to-Consumer (B2C) select who and why they buy from one company or another, as well as when they buy. To harness that information, you have to collect it — that's where CRM comes in.

The better the marketing data, insights and customer-centric knowledge driving decisions, the more effective every marketing tactic and strategy will be. When you build marketing strategies on a solid foundation of customer intelligence and insights, customer experiences improve.

Positive customer experiences build trust, fuel repurchases, create loyalty and lead to higher lifetime customer values. This chain reaction of customer-centric growth gets started when marketing and sales teams know what customers are expecting, why they're expecting it and how best to deliver products or services that exceed customer expectations. **Customer retention:** With all the data available today, there's no excuse for not having a complete 360-degree view of customers. Today's CRM systems should provide teams with customer information at their

fingertips. This makes for a much more considerate journey. For example, when speaking to customer services, the customer feels valued, doesn't need to reiterate what's happened, and the representative can empathize and help solve any problems.