



**ARIGNAR ANNA GOVERNMENT ARTS COLLEGE- VILLUPURAM.**

**DEPARTMENT OF STATISTICS**

**NAAN MUDHALVAN PROJECT**

**III B.SC.STATISTICS**

**SHIFT- 1**

## **IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS**

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Team member: GURUNATHAN I

Team member: KADIRVEL N

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5



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# IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

## 1 INTRODUCTION

### 1.1 Overview

**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 initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation.**

### 1.2 PURPOSE

CRM implementation is the process of [introducing a CRM system](#) to your business. It starts from choosing the right solution for your needs, and ends with actively using it to streamline your business processes. However, maybe that's an overly-simplified account; implementation is a multi-stage process...

1. Identifying a problem that CRM solves
2. [Searching for an appropriate CRM system](#) for your business
3. Finding appropriate systems and testing it
4. Subscribing or buying the appropriate CRM platform

## 2 PROBLEM DEFINITION & DESIGN THINKING

### **2.1 Empathy Map**



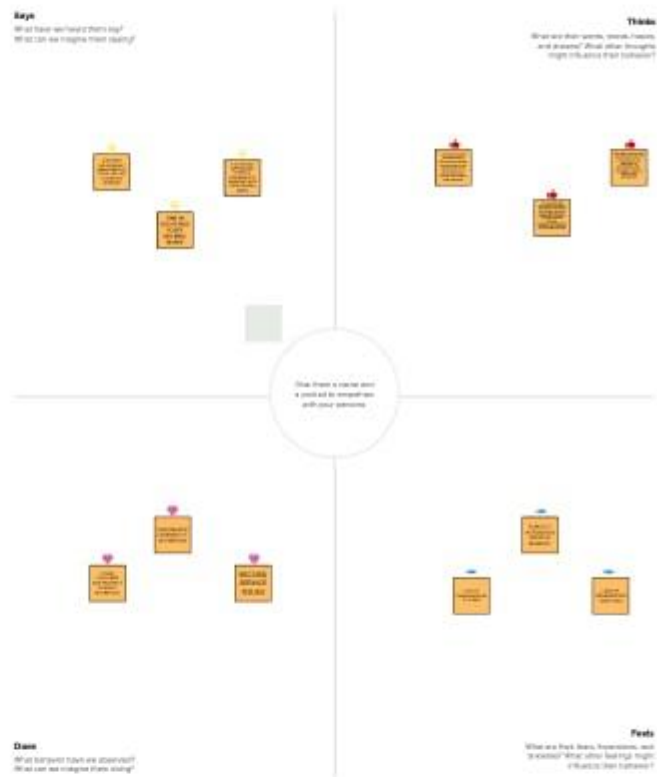
## Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

Share template feedback

 **Build empathy**

The information you add here should be representative of the observations and research you've done about your users.



**New! more  
inspiration!**  
There is something of  
all this dispersed  
throughout the  
pages of *Interiors*.



## 2.2 Ideation & Brainstorming Map

The image displays a Mural ideation map titled "Implementing CRM" with a URL: [app.mural.co/t/implementingcrmforresulttrac1617/m/implementingcrmforresulttrac1617/167928869974/99565560dc1e5848edc545d565d225e418716f0b7s...](https://app.mural.co/t/implementingcrmforresulttrac1617/m/implementingcrmforresulttrac1617/167928869974/99565560dc1e5848edc545d565d225e418716f0b7s...). The map is organized into five columns, each representing a different perspective or stakeholder:

- KADHIRVEL:** Focuses on CRM offerings, system integration, team readiness, and implementation challenges. Key points include: "Most CRM offerings include training and consulting programs to enable businesses to get the most out of their software," "A new CRM system will overhaul many established processes for your team," "An unprepared team will be less productive as they juggle learning the system with completing their day-to-day tasks," and "However, most small businesses can expect implementation to last one to three months."
- KALAIYARASAN G:** Discusses overcomplication, user adoption, and the benefits of CRM. Key points include: "Overcomplication can alter the focus of a CRM so that it solves the wrong issue," "Don't attempt to achieve the primary goal of every department or user," "Although you see the bigger picture, you are probably less involved in the system's day-to-day use than your team is," "Goldenberg emphasizes a '3x factor' to show why users the effectiveness of a CRM," "A user who consistently sees the advantages of using the software will recognize its usefulness," "CRM platform is a tool to help your team solve problems, it can't solve the problems itself," and "Map out exactly how the training should hit the ground at launch."
- LOKESWARAN:** Addresses customer relationship management (CRM) software, implementation challenges, and the importance of training. Key points include: "Customer relationship management (CRM) software has evolved from a tool that helped sales teams store customer data into a multifaceted hub that drives the technology suite of an entire business," "It can add tremendous value to your company, but how well you integrate it with your preexisting processes will dictate its effectiveness," "The best implementation practices involve focusing on your education goals, employing a dedicated team to lead the implementation, and offering training opportunities that help employees understand how to use the software when it launches," "A CRM platform is an overarching system overview, and the scale and detail of its implementation must match its intended reach," "A common mistake in seeking out these systems is viewing the platforms as accessories – extensions, rather than integrations," "They may even distract from the primary mission, ask yourself several guiding questions when considering whether CRM software is appropriate for your company," "As the fastest-growing business software, CRM offers an immense field of software, but simply choosing the best CRM to use is not enough," "The most important factors in your decision could include pricing, the relevancy of the CRM's tools to your process, ease of use and available integrations," and "Keep the initial implementation simple while maintaining awareness of what future upgrades could entail."
- GURUNATHAN:** Focuses on forecasting costs and benefits, implementation challenges, and the importance of training. Key points include: "Forecast the costs and benefits. Work with your various teams to forecast the specific effects this CRM will have on your business during the implementation period, the initial six months after launch as your team acclimates, and the following 12 months once the CRM is a fixed part of their daily use," "Some of the most useful reports are cost-benefit analyses and implementation timelines. Be mindful that production may dip during various stages of the rollout," "Resources will be focused on installation while employees learn new processes, and general expenses can increase depending on the training and consulting services you select," "These concrete numbers will provide you more exact expectations to help you modify your actionable goals and achieve buy-in from your various stakeholders," "Metrics that demonstrate how much you expect to improve customer retention and conversion rates will convince even the most skeptical," "But don't dismiss their feedback – they may catch a hidden detail, and that reluctance could carry over to the other staff when inevitable pain points arise during the learning process," "Once the CRM is operational, champions to system training instead of their general staff point, the change should be familiar system, its benefits should be clear, and how to use the tool."
- KADH:** Focuses on CRM offerings, system integration, team readiness, and implementation challenges. Key points include: "Most CRM offerings include training and consulting programs to enable businesses to get the most out of their software," "A new CRM system will overhaul many established processes for your team," "An unprepared team will be less productive as they juggle learning the system with completing their day-to-day tasks," and "However, most small businesses can expect implementation to last one to three months."

## 3 RESULT

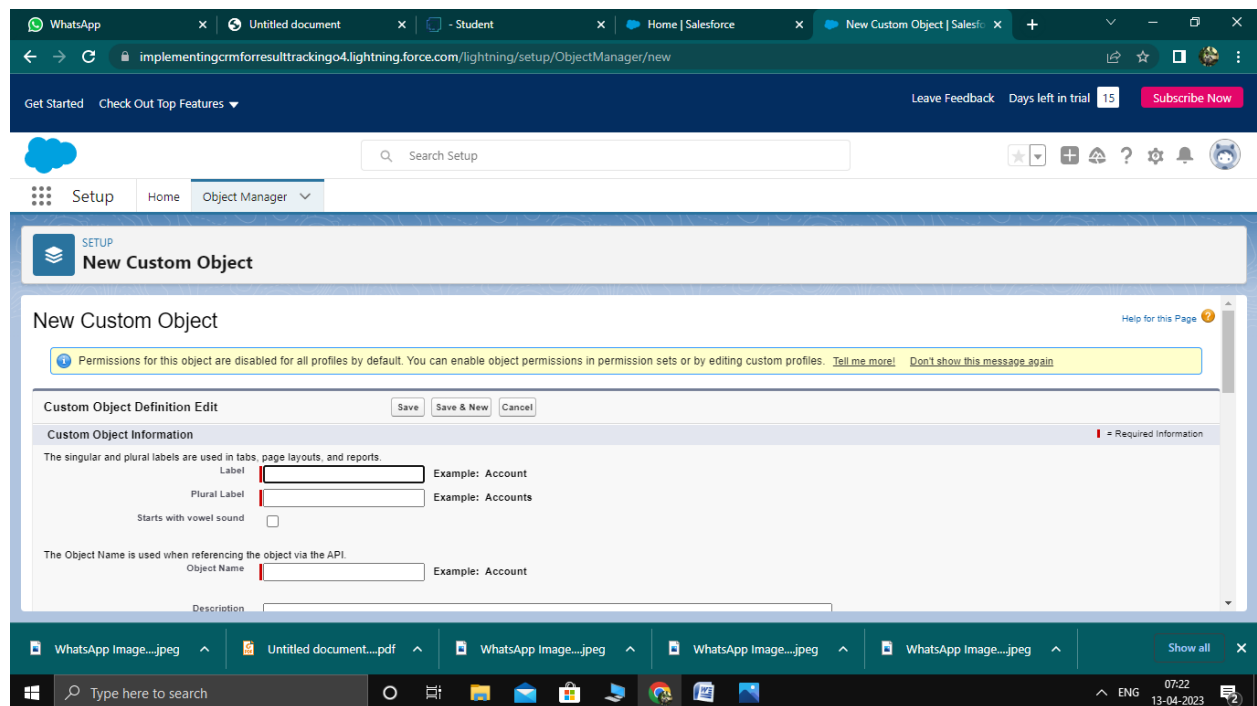
### 3.1 Data modal:

Salesforce objects are database tables that permit you to store data that is specific to an organization.

Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

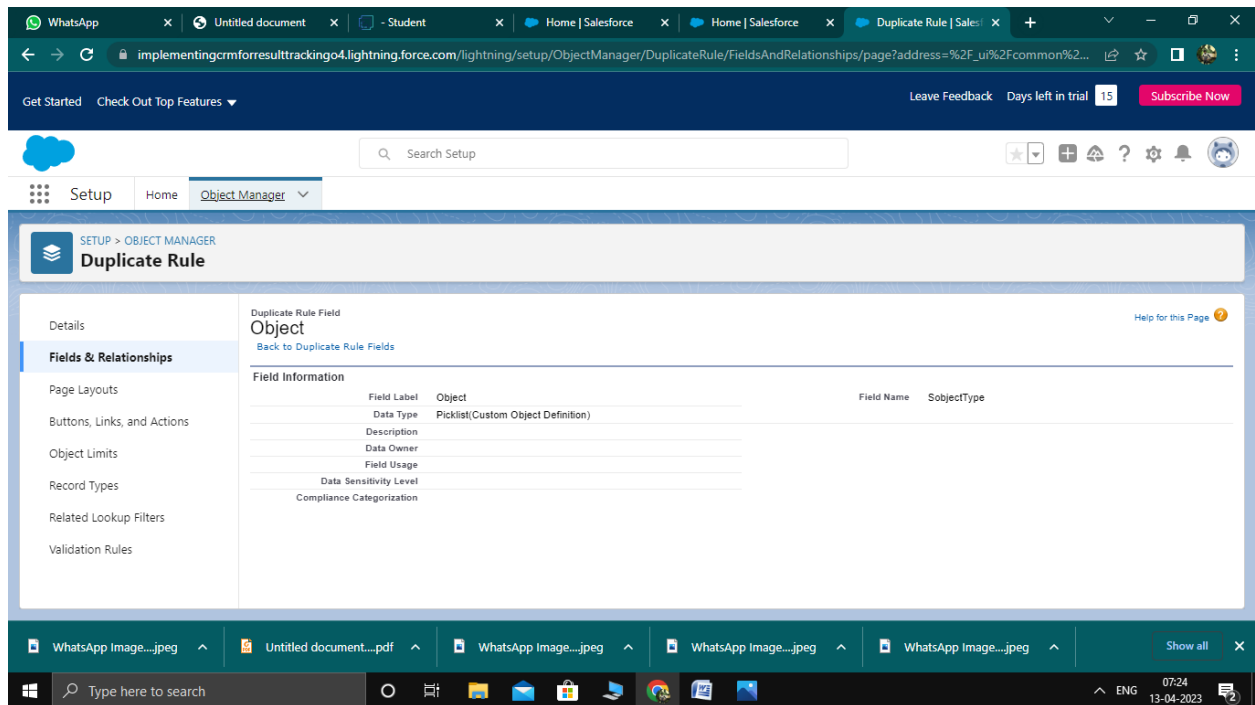
Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e Semester, Candidate, Course Details, Lecturer Details, Internal Results.

## Obj1



The screenshot shows the Salesforce 'New Custom Object' setup page. The browser tabs include WhatsApp, Untitled document, - Student, Home | Salesforce, and New Custom Object | Sales. The URL is [implementingcrmforresulttrackingo4.lightning.force.com/lightning/setup/ObjectManager/new](https://implementingcrmforresulttrackingo4.lightning.force.com/lightning/setup/ObjectManager/new). The page header shows 'Get Started', 'Check Out Top Features', 'Leave Feedback', 'Days left in trial 15', and 'Subscribe Now'. The main content area is titled 'New Custom Object' and includes a message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section contains the following fields: 'Label' (with an example 'Account'), 'Plural Label' (with an example 'Accounts'), 'Starts with vowel sound' (checkbox), 'Object Name' (with an example 'Account'), and 'Description'. A red error message 'Required Information' is visible next to the 'Label' field.

## Obj 2



## 3.2 Activity & screenshot

### Create An Object:

Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e Semester, Candidate, Course Details, Lecturer Details, Internal Results.

The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

On the Custom Object Definition page, create the object as follows:

- Label: Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

**Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select**

- Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

**To Navigate to Setup page:**

- Click on gear icon then click setup.

**To create an object:**

- From the setup page then Click on Object Manager then Click on Create then Click on Custom
- Object.
- On Custom object defining page:
- Enter the label name, plural label name, click on Allow reports, Allow search then Save.

WhatsApp x Untitled document x - Student x Home | Salesforce x New Custom Object | Sales: x +

← → ↻ implementingcrmforsulttrackingo4.lightning.force.com/lightning/setup/ObjectManager/new

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Search Setup

Setup Home Object Manager ▾

### SETUP New Custom Object

New Custom Object Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

WhatsApp Image...jpeg x Untitled document...pdf x WhatsApp Image...jpeg x WhatsApp Image...jpeg x WhatsApp Image...jpeg x Show all x

Type here to search

ENG 07:22 13-04-2023

WhatsApp x Untitled document x - Student x Home | Salesforce x Home | Salesforce x Duplicate Rule | Sales: x +

← → ↻ implementingcrmforsulttrackingo4.lightning.force.com/lightning/setup/ObjectManager/DuplicateRule/FieldsAndRelationships/page?address=%2F\_ui%2Fcommon%2...

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Search Setup

Setup Home Object Manager ▾

### SETUP > OBJECT MANAGER Duplicate Rule

Duplicate Rule Field Help for this Page

Object [Back to Duplicate Rule Fields](#)

Field Information

Field Label	Object	Field Name	SubjectType
Data Type	Picklist(Custom Object Definition)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

WhatsApp Image...jpeg x Untitled document...pdf x WhatsApp Image...jpeg x WhatsApp Image...jpeg x WhatsApp Image...jpeg x Show all x

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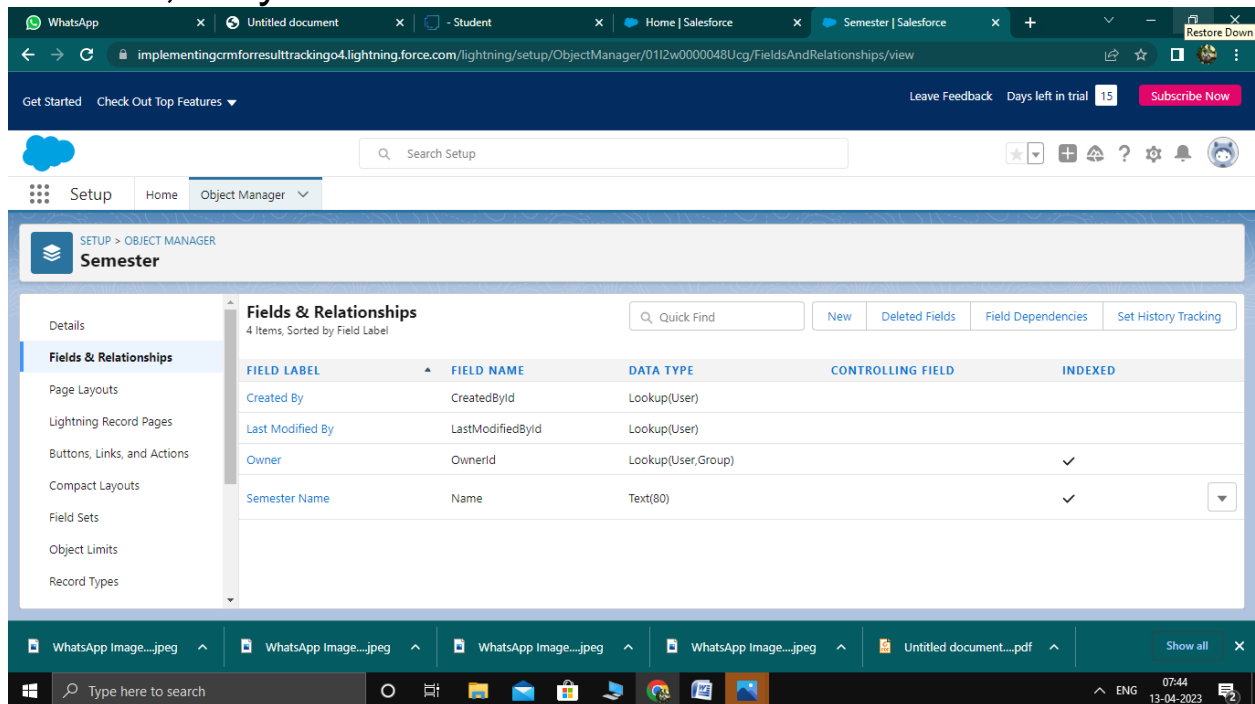
ENG 07:24 13-04-2023

## Fields And Relationship



An object relationship in Salesforce is a two-way association between two objects.

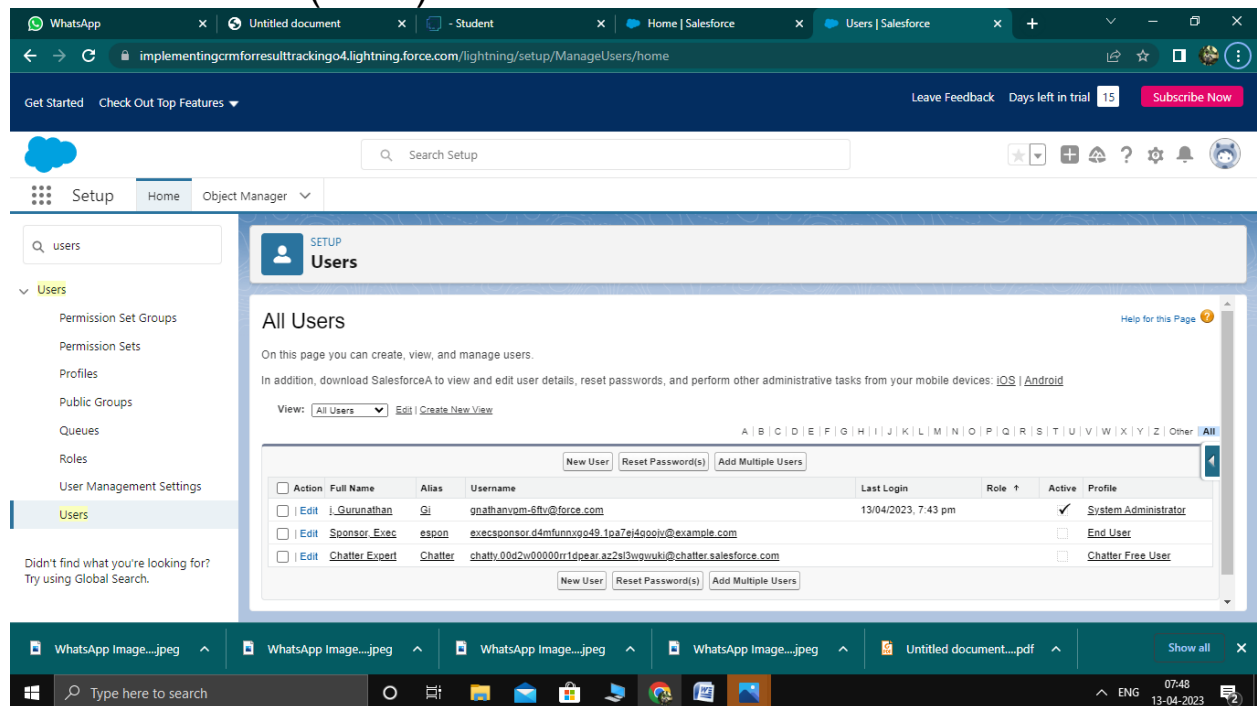
Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.



## Creating A Users

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Martin and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.

#### 4. Select a Role(none)



#### 5. Select a User Licence As salesforce.

#### 6. Select a profile as Salesforce User.

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

### Reports And Dashboards

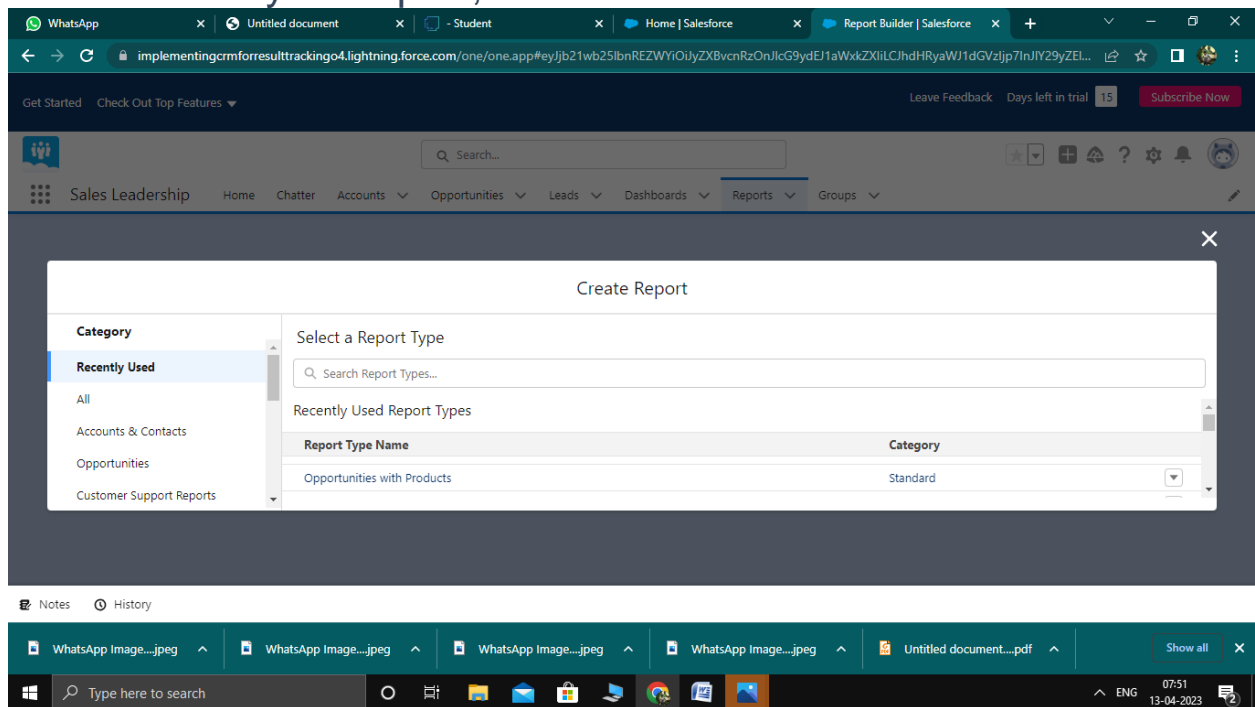
1. From the Reports tab, click New Report.

2. Select the report type as Candidate with candidate Marks for the report, and click Create.

3. Customize your report, then save or run it.

## To create a report:

- a. Go to the app and click on the reports tab
- b. Click New Report
- c. Select report type from category or from report type panel or from search panel then click on start report.
- d. Customize your report, then save or run it.



## Create A Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.

3. Name your dashboard Candidate Board . Leave all other fields as is and click Create.

4. Click + Component.

5. For Report, select Candidate Marks by Stage. Click Select. ...

6. For Display As, select Vertical Bar Chart and click Add.

7. Click Save.

8. Click Done

#### **4 Trailhead profile public URL**

Team lead-<https://trailblazer.me/id/lwaran14>

Team Member 1-<https://trailblazer.me/id/gurui1>

Team Member 2-<https://trailblazer.me/id/nkadirvel2002>

Team Member 3-<https://trailblazer.me/id/kraji23>

#### **5 ADVANTAGES & DISADVANTAGES**

##### **Pros**

- It allows for the consolidation of customer data and the basis for deep insights.
  - It speeds up the sales conversion process.
  - It increases staff productivity, lowering time-cost.
  - It allows geographically dispersed teams to collaborate effectively.
- Improves customer experience by allowing personalisation and improved query resolution.

## **Cons**

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralised data.
  - The excess initial time and productivity cost at the implementation.
  - Requires a process-driven sales organisation.
    - CRM may not suit all businesses.

## **6 APPLICATIONS**

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 initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation

## **7 CONCLUSION**

**Conclusion**Customer Relationship management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed numerous business challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its produc

## 8 FUTURE SCOPE

These days, numerous small and medium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

