Building the CRM Application

Relevel
by Unacademy

What does it take to Build it

- Intro to CRM Application
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Intro to CRM Application

- CRM strategy refers to how firms approach customer contacts and create connections with them. It entails gathering customer data and evaluating the history of client interactions to improve services and establish stronger customer relationships, which will lead to increased sales and revenue.
- Your client information will be all over the place if you don't have a strong CRM strategy in place, and it will be difficult to keep track of all the contact points and interactions you've had with specific consumers. This results in a long sales cycle and a generic and poor consumer experience.

Building Great Customer Relations

- Regardless of where a customer is in your sales cycle, great customer relationships are built on a consistent and personalized experience provided by your company. This means that every team in your company, from marketing to sales to customer service, must provide a consistent customer experience.

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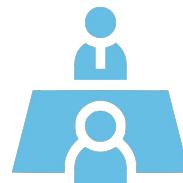
Westfield's Case Study

- The business of Westfield is entirely about selling. The organization, which owns and maintains more than 100 shopping centers throughout the world, specializes in assisting shops in growing successful businesses. Westfield's own business is thriving thanks to a custom lease management tool created on App Cloud, which allows the company to do more to assist its clients in achieving their objectives.
- Westfield's specialty leasing division — which distributes retail carts, kiosks, temporary stores, sponsorships, and brand activations, as well as trade shows and other special events — sought to enhance how its salespeople found and showcased inventory to customers so they could close more deals, faster.
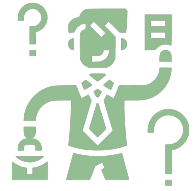
Best Technology Services Case Study

- Best Technology Services competes on its enormous reach in an industry where pricing is the primary criterion. Every year, the IT services company completes more than 250,000 field service assignments across Australia, including in the most distant places. Best Technology Services subcontracts less than 1% of its jobs, whereas its competitors rely extensively on partners and subcontractors.

- The firm employs a 300-strong team that spans Sydney to Perth and all of the regional locations in between. These technicians are now all linked through Salesforce Field Service. Best Technology Services can provide consistent results whether a customer needs a one-time installation or a 700-branch upgrade.
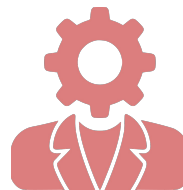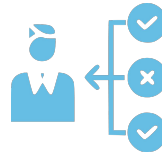
Benefits of CRM

Boost Sales

Efficient Business Process

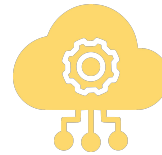**Tactical Decision Making**

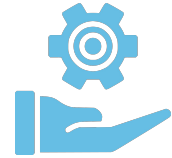**Customer Satisfaction**

How does CRM serve your industry?

Healthcare CRM

eCommerce CRM

SaaS CRM

Manufacturing CRM

Why do we need a CRM Strategy?

- CRM systems aid in the management and maintenance of customer connections, as well as the tracking of sales leads, marketing, and pipeline, as well as the delivery of actionable data. CRM solutions boost your profits by reducing administrative operations in your sales, marketing, and service departments, allowing you to focus on what matters most: developing and sustaining customer connections.
- A solid CRM solution is a complex platform that stores everything you need to grow, improve, and maintain your customer connections. You may miss out on income opportunities if you don't optimize your operating procedures or make the most of your customer connections or sales leads without the help of an integrated CRM system.

Who benefits from CRM?

- Small enterprises who want to expand
- Leaders in the industry are looking for large-scale solutions.
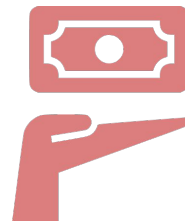
End Product Demonstration

- A fantastic product demonstration is almost unrivaled in its effectiveness.
- When done correctly, a demo allows the buyer to see and feel how things will improve if they purchase (and deteriorate if they do not).

Use these guidelines to ensure that your product demos result in a sale.
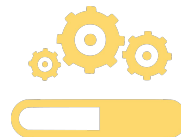
1. **Customize your demo**
   - Because each consumer is different, each demo should be tailored to them. Do your homework before demonstrating a product. To understand the background of the demonstration, look at the customer's SEC filings, press announcements, conference proceedings, annual reports, public interviews, and so on.
   - Also, learn as much as you can about the people or group who will be watching the demo. Then, to match the data with the contents, make the necessary changes.

Use these guidelines to ensure that your product demos result in a sale.

2. **Tell the Customer's Story**
   - A tour of a product's features and functionalities should never be included in a product demonstration. Instead, it should tell the customer's story, with the product as the central character. Assume you're showing a software application that helps organizations better manage their component inventory.

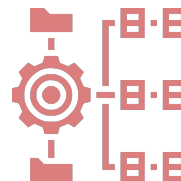# Use these guidelines to ensure that your product demos result in a sale.

3. **Rehearse, rehearse, rehearse**
   - Demos are more difficult than presentations because you must focus on the client, the demonstration's influence on the customer, and the mechanics of the demonstration all at the same time. So, trying to deliver a demonstration without rehearsing it at least three times is a complete waste of time.
   - When it comes to demos, you'd be surprised at how many sales professionals believe they can wing it. The end consequence is usually a calamity.

Use these guidelines to ensure that your product demos result in a sale.

4. **Test everything beforehand**
   - On a visceral level, a botched demo tells the buyer that either:
   - You didn't fully prepare, therefore buying from you was probably a bad idea; the product is a sham that fails even in the most forgiving of conditions; both of the above.

# Use these guidelines to ensure that your product demos result in a sale.

5. **Close the deal**
   - Because "seeing is believing," there is no better time to seal a sale or request the next step, such as a meeting with a decision-maker, than after a successful demo. As a result, when you demo, you must ask a question that will advance the sale.
   - If you don't do this, it implies that either the demo was a waste of time or that the product isn't worth purchasing in the first place.

The architecture of an app

- The principles and procedures used to design and create an application are referred to as application architecture. When designing an app, the architecture provides a roadmap and best practices to follow so that you end up with a well-structured app.
- Software design patterns can assist you in the development of an application. A pattern is a solution to a problem that can be repeated.
- The architecture serves as a starting point or roadmap for developing an application, but you'll have to make implementation decisions that aren't covered by the design. For example, choosing a programming language in which to create the application is the first step.
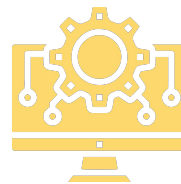
Folder Structure

- The way folders are structured on your computer is referred to as a folder structure. As more folders are added over time, you can either maintain them all at the same level (as in Folders 1, 2, and 3 in the chart below) or nest them within each other to create a hierarchy (as in Subfolders 1B and 1B-1 below).
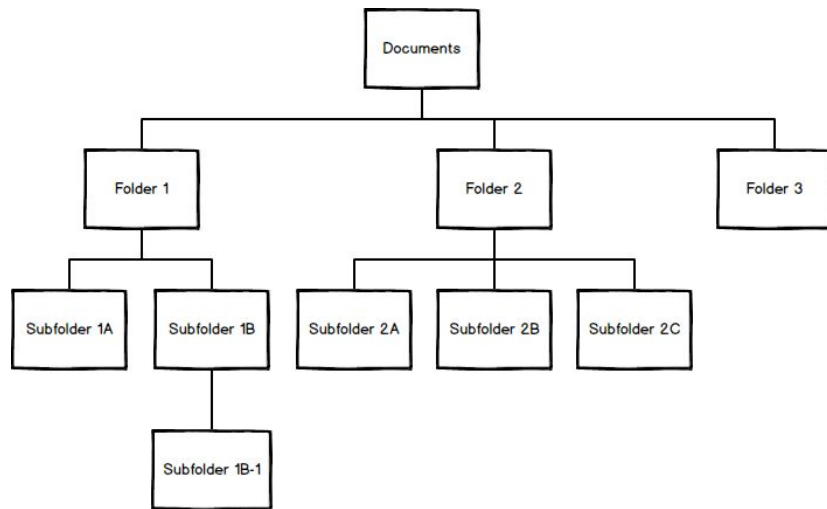
Figma and Trello to manage app

- Trello is a project and task management app. You can organize and prioritize your projects using Trello's boards, lists, and cards.
- Trello's capabilities can be extended by power-ups. You can use the Figma Power-up to add live Figma files and prototypes to your Trello decks.
- This allows you to share your designs with other stakeholders such as designers and developers.
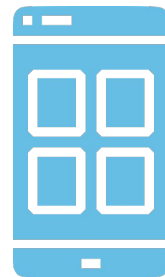
Add the Figma power up

Add the Figma Power-Up to your boards or team boards. The Figma Power-Up can be added to a team board by anyone in your Trello team.

- In your Trello team, open the board.
- In the upper right corner, select Show Menu.
- Click Add Power-Up: in the Power-Ups section.
- To select lick, search for the Figma Power-Up and click Add.
- Add to confirm and enable the Power-Up:
- When viewing a card in Trello, go to the Power-ups section to access Figma.
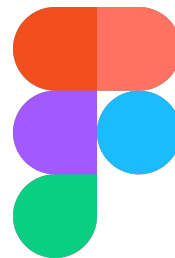
In Trello

In Trello, attach Figma files or prototypes from the card.

1. Open the card to which you'd like to add the embed.
2. Select the Figma Power-Up from the Power-Ups section.
3. Choose between:
4. Attach a file
5. Attach a prototype
6. 4. By name, look for the file or prototype you want to add. To connect a file or prototype to the card, click on its name.
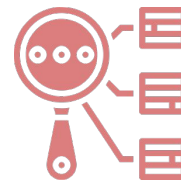7. 5. In Trello, you can now see the file or prototype.

Env setup

- Environment variables defined in a .env file at the project's root are imported by React. If you're already familiar with the details, skip to Environment Configuration, but keep in mind that the values in .env serve as defaults.

Overview

- Variables can be set in your shell or the project's root.env file.
- Only variables with the REACT_APP_ prefix are imported.
- Imported values, such as process.env.REACT_APP_SECRET_CODE, are stored in process.env.
- To observe new/updated variables, the development server must be restarted.
- Shell variables take precedence over .env file variables.
- NODE ENV is set to development (when using npm start), test (when using npm test), or production (when using npm test) (when using npm build). There are just three environments from the perspective of create-react-app.

Thank You!