Name: Nisha A K

Designation: Data Analyst Intern

Department: Data Analytics and Product management

Design Document

Data Collection and Mapping

Outcome:

Gather and organize detailed data for Finolex Academy of Management & Technology (FAMT). The data is structured in CSV files and imported into Zoho CRM for account and contact mapping within the respective modules, enabling efficient tracking and management of institutional information.

Overview:

The process involves creating two Excel sheets:

1. **Institution Details** – Captures information about colleges, departments, labs, exams, contact information and students & employees count.
2. **Faculty Details** – Captures data about faculty members, including names, designations, emails, phone numbers, departments, and reporting managers.

Once the data is organized, it is imported into Zoho CRM to map it under the Accounts module. This process ensures centralized data access and improved organization.

Use Case Implementation Steps:

Implementation Stage 1: Data Collection and Structuring

Description:

Collect the institute data from various online sources, including,

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- o **Web Scraping / Manual Extraction** – Researching and gathering relevant details.
- o **Official Websites –** Extracting structured information.
- o **LinkedIn –** Retrieving verified company and contact information.

Outcome:

Steps:

- o Identify target institutes based on business needs.
- o Use web scraping tools (if applicable) or manual research to extract relevant data.
- o Ensure data includes essential fields (e.g., company name, contact person, email, phone, industry type).
- o Store collected data in a structured format (CSV, Excel).

Overview:

Input:

- o Scrape the Institute information from websites, LinkedIn, and official sources.

Output:

- o A comprehensive dataset of accounts and contacts.

Description:

Image of Account Mapping csv file

Account Name	Phone	Parent Account	Website	Account Type	Ownership	Industry	Employees	Annual Revenue	Billing Street	Shipping Street
Finolex Academy of Management and Technology,Ratnagiri	415639 ; +91 2352 228 361	University of Mumbai	https://famt.ac.in/	Customer	P. P. Chhabria	Education	106	53,18,90,00,000.00	Finolex Academy of Management and Technology,Ratnagiri	Finolex Academy of Management and Technology,Ratna

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Overview: Image of Contact Mapping csv file

Salutation	First Name	Last name	Account Name	Email	Title	Department
Dr	Aruna	M. Katara	Finolex Academy of Management and Technology,Ratnagiri	info@famt.ac.in	President	
Dr	Kaushal	K. Prasad	Finolex Academy of Management and Technology,Ratnagiri	principal@famt.ac.in	Principal	Mechanical Engine
Dr	Jayant	Jagannath Mane	Finolex Academy of Management and Technology,Ratnagiri	hodee@famt.ac.in	HOD, Associate Professor	Electrical Enginee
Dr	Sandeep	D. Chawda	Finolex Academy of Management and Technology,Ratnagiri	sandeep.chawda@famt.ac.in	Dean R&D, Associate Professor	Electrical Enginee
Dr	Aswant	K. Sharma	Finolex Academy of Management and Technology,Ratnagiri	aswant.sharma@famt.ac.in	Assistant Professor	Electrical Enginee
Mr	Milind	N. Tagare	Finolex Academy of Management and Technology,Ratnagiri	Milind.tagare@famt.ac.in	Associate Professor	Electrical Enginee
Mr	Suhas	H. Mhabadi	Finolex Academy of Management and Technology,Ratnagiri	suhas.mhabadi@famt.ac.in	Assistant Professor	Electrical Enginee
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Mr	Sudip	Halder	Finolex Academy of Management and Technology,Ratnagiri	sudip.halder@famct.ac.in	Assistant Professor	Electrical Enginee
Dr	Sharada	V. Chougule	Finolex Academy of Management and Technology,Ratnagiri	hodextc@famt.ac.in	Professor and HOD	Electronics And T
Dr	Suhasini	S. Goilkar	Finolex Academy of Management and Technology,Ratnagiri	Suhasini.goilkar@famt.ac.in	Associate Professor	Electronics And T

Implementation Stage 2: Data Preparation for Zoho CRM

Description:

Refining collected data to ensure accuracy and prevent errors in CRM.

Steps:
- o   Standardize company names, addresses and contact details.
- o   Remove duplicate records using Excel functions or database queries.
- o   Verify emails and phone numbers through validation tools.
- o   Ensure consistency in industry classification.

Description:

Input:

o Raw data from Stage 1.

Output:
- o   Cleaned and verified data from CRM import

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Implementation Stage 3: Import Data into Zoho CRM

Description:

Uploading refined data into Zoho CRM and linking accounts with relevant contacts.
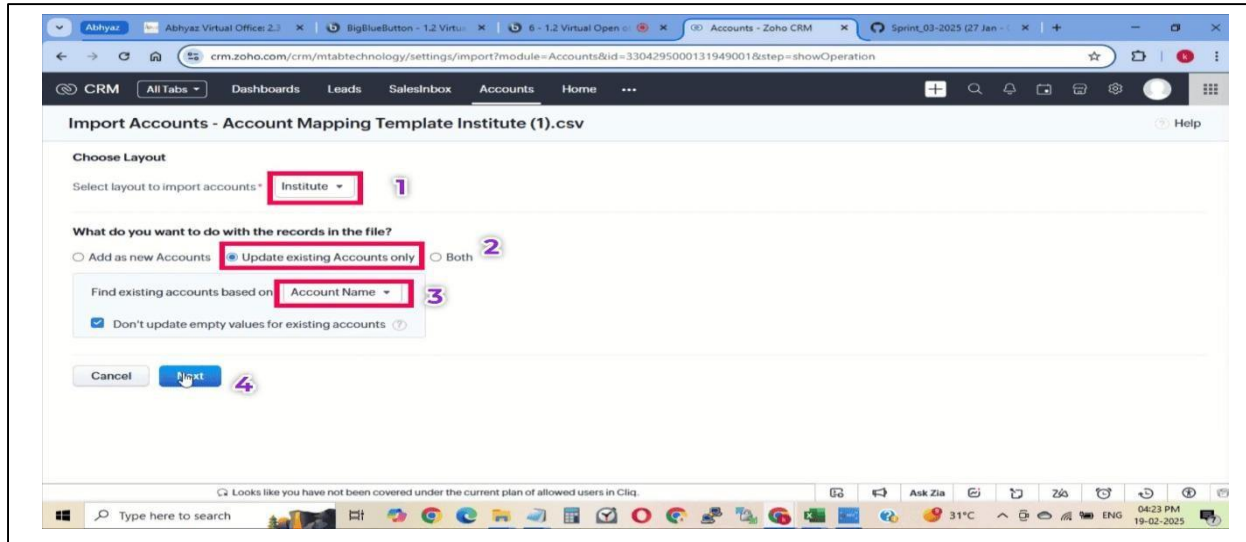
Overview:

Steps:

- o Select the layout as **Institute**.
- o Click on **Update existing accounts only** under **What do you want to do with the records in the file**.
- o Choose **Account Name** on **Find existing accounts based on**.
- o Click next to proceed further
- o Make sure that all the fields are mapped with the field in the Zoho CRM
- o Click **Next** after mapping the unmapped fields
- o Click Next after mapping

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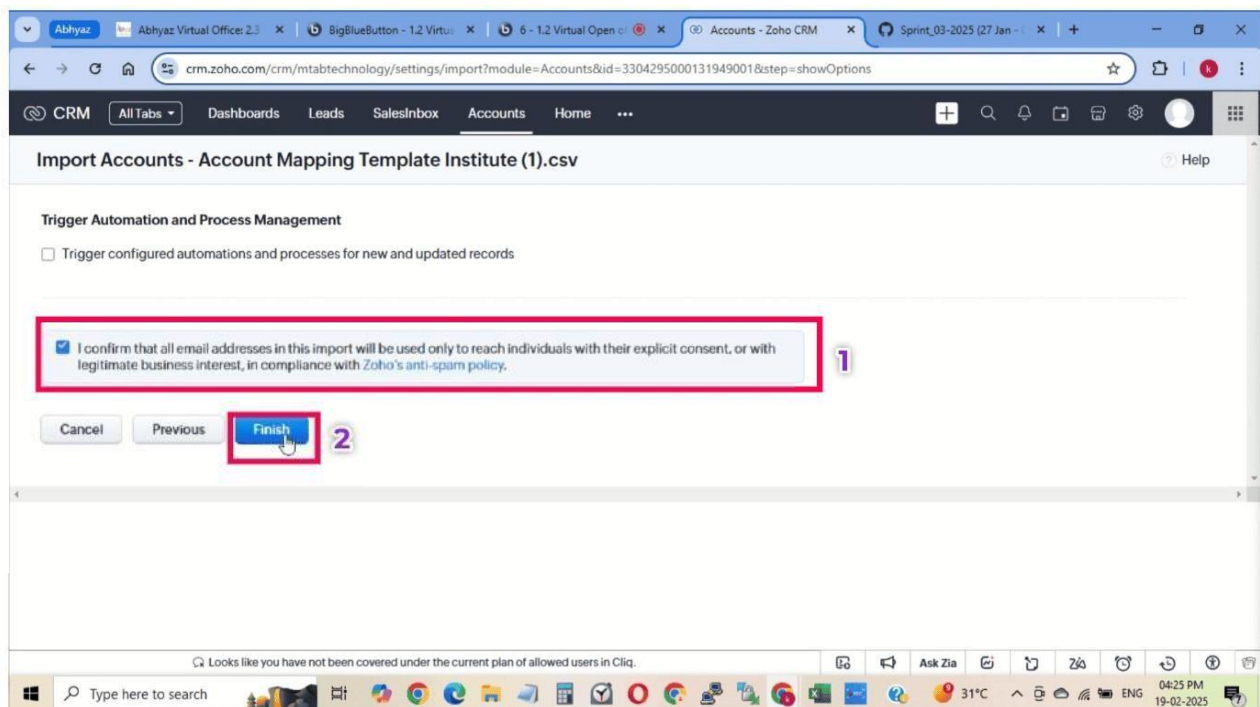
Overview:

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- o Check only the **Zoho's anti-spam policy** checkbox.
- o Click **Finish** to complete the import process.

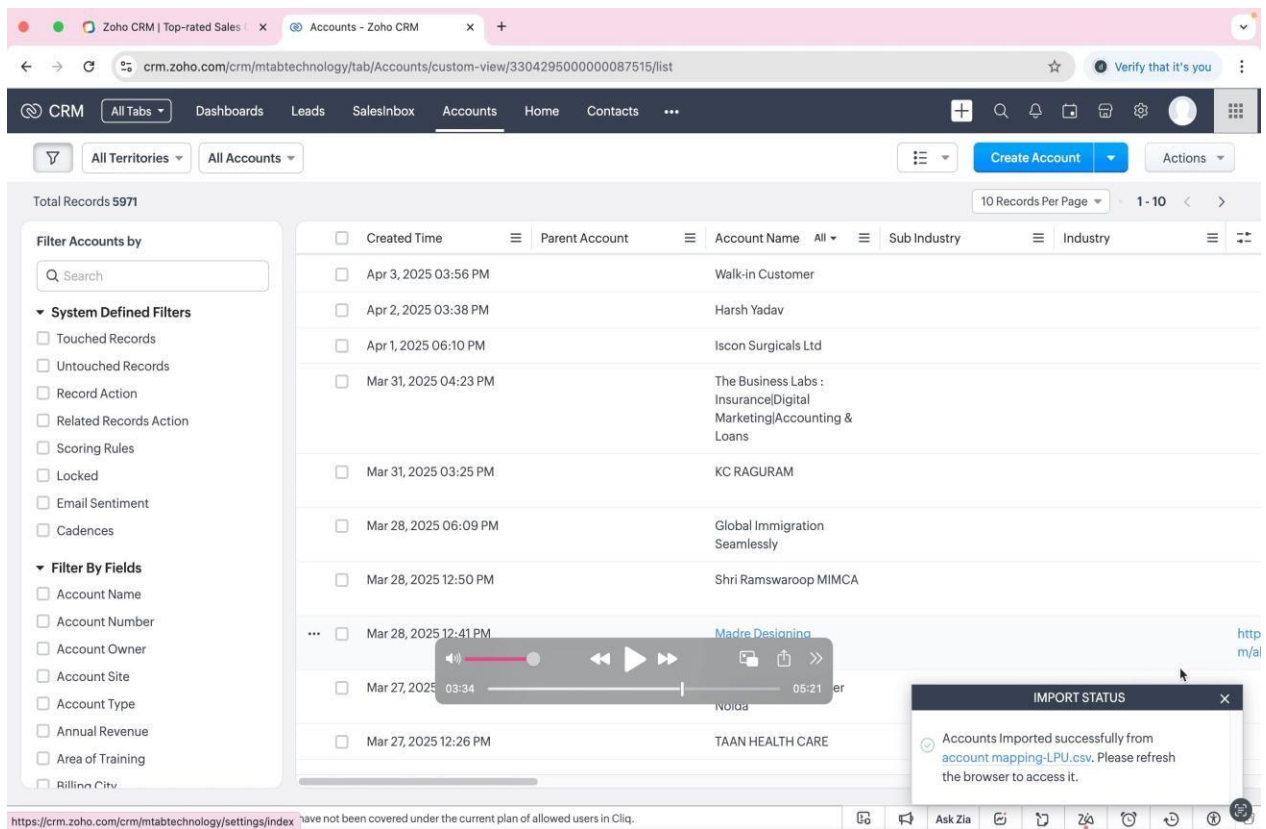**Name: Nisha A K**

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Input:

○ Cleaned and formatted data from Stage 2.

Output:

○ Successfully imported accounts and contacts in Zoho CRM.

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Implementation Stage 4: Implementing Role Hierarchy in CRM

Description:

Configuring "Reporting To" relationships for structured organizational hierarchy.

Steps:

1. **Define Role Hierarchy:**

   o Identify the reporting structure within organizations.
   o Create role based levels (e.g., CEO → Managers → Executives).

2. **Map Contacts to Their Reporting Managers:**

   o Use the "Reporting To" field to establish reporting relationships.

3. **Configure User Permissions:**

   o Assign visibility and access based on roles in the hierarchy

Input:

   o Organizational structure and reporting relationships.

Output:

   o A clearly defined role hierarchy in Zoho CRM with proper reporting relationships.

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Target Audience:

- o **Sales & Marketing Teams** – Utilize mapped accounts and contacts for lead generation, customer engagement, and sales pipeline management. The structured role hierarchy helps streamline communication and follow-ups with the right decision-makers.
- o **CRM Administrators** – Manage the configuration, customization, and maintenance of the CRM system, ensuring accurate account-contact mapping and proper role-based access for users.

Output:

- o **Zoho CRM Admins –** Configure and manage CRM settings.
- o **Sales Representatives –** Utilize mapped accounts for prospecting.
- o **Managers & Executives –** Oversee role hierarchy and reporting relationships.
- o **Data Analysts –** Monitor CRM data quality.

Tool Permissions Required:

- o **Zoho CRM Admin Access –** To configure CRM settings.
- o **Data Import Access –** To upload and map accounts/contacts.
- o **Role Hierarchy & Permission Management –** To set up reporting structures.