

IMPLEMENTING CRM FOR RESULT TRACKING OF CANDIDATES WITH INTERNAL MARK

1. INTRODUCTION

1.1 Overview

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth

They allow businesses to learn more about their target audiences and how to best cater for their needs, thus retaining customers and driving sales growth. CRM may be used with past, present or potential customers..

CRM stands for Customer Relationship Management, and it's a technology for managing and supporting customer relationships. CRM technology helps companies build and grow customer relationships across the entire customer lifecycle.

The beginnings of CRM as we know it started in the 1980s. Robert and Kate Kestnbaum were pioneers of database marketing. Which was a form of direct marketing that analysed the customer database statistically to identify which customers would be most likely to react to a marketing campaign?

The CRM cycle involves marketing, customer service and sales activities. It starts with outreach and customer acquisition and ideally leads to customer loyalty. There are five key stages in the CRM cycle: Reaching a potential customer. Customer acquisition

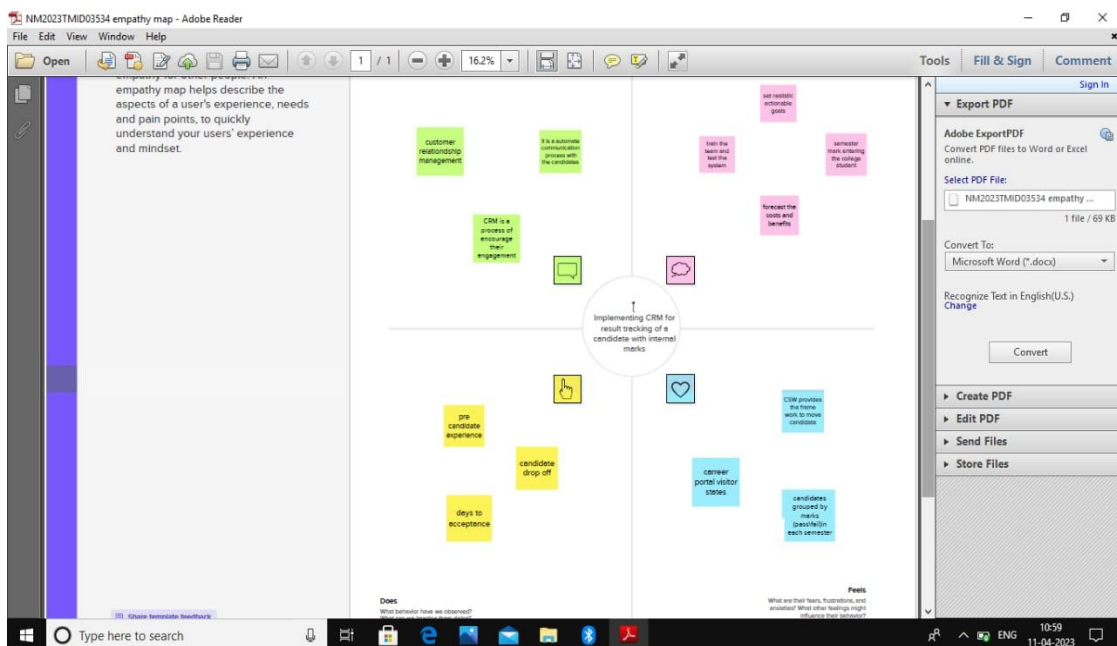
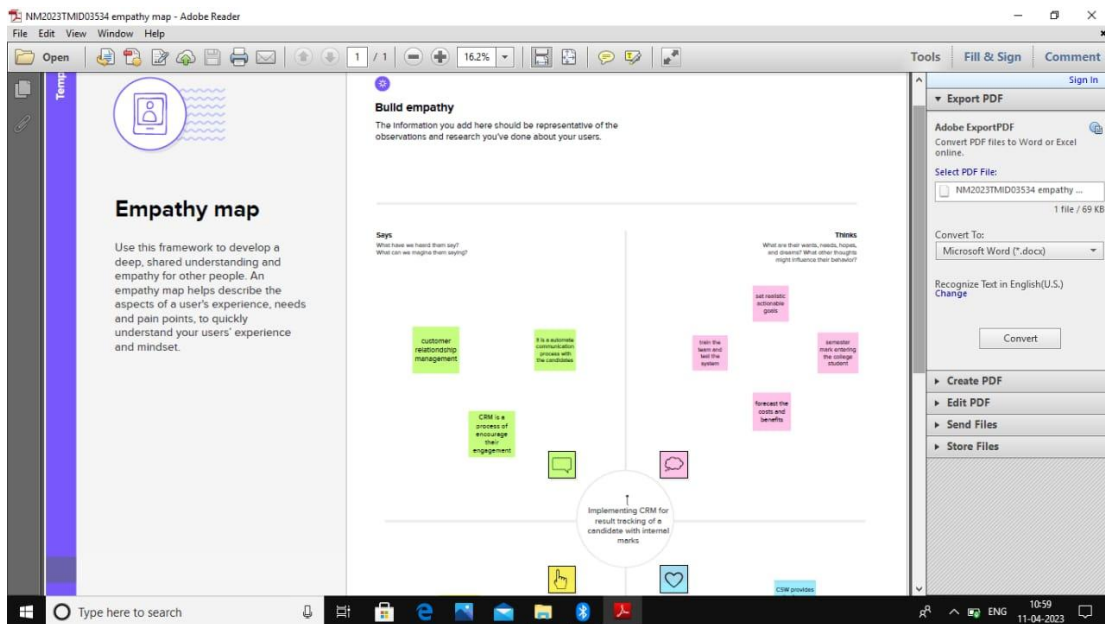
1.2 Purpose

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability

Basically, it helps nurture relationships with customers for long-term sales. Although the underlying principle in CRM is not to squeeze out more profits but to make customers happy, which in turn results in product loyalty and more revenues for the business.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy map



2.2 Ideation & Brainstroming Map

brainstorm.pdf - Adobe Reader

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2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

TIP
You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

K. GAYATHRI

- they could meet with qualified applicants
- they could save time
- there are lots of technology options available
- faculty name
- semester mark
- student information
- course details
- department information
- content validity

M. GAYATHRI

- improved confidence
- done well
- learning
- assessment
- certification
- progress
- transfer
- accountability
- interaction between learning and learning

A. GNANASRI

- productivity
- share and promotion
- data base
- right product for your company
- student information
- application of skills
- student performance
- time constraints
- knowledge

V. GUNASEELI

- strategy segmentation
- technology process and organization
- the value creation process
- the multi-channel integration process
- the information management process
- allocate resources
- scope statement
- responsibility and time
- map out risks

Person 5

Person 6

Person 7

Person 8

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11:04 11-04-2023

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3

Group ideas

CRM is a method for managing and improving relationship with current and potential future job candidates. It is a systematic communication process with the candidates.

20 minutes

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes

After you collaborate
You can export the result as a to share with members of your organization.

Quick start guide

1. Share the result: Share a view link to the result board in the top right of the tool.
2. Export the result: Export a copy of the result as a PDF, CSV, or JSON.

Keep working forward

- Strategy template: Define the company strategy. [Open the template](#)
- Customer segments: Understand customer segments for an app. [Open the template](#)
- Strengths, weaknesses, opportunities, and threats (SWOT): [Open the template](#)

Share template feedback

Importance
Consider the importance of each idea. Place your ideas on the grid. The higher the importance, the higher the idea is placed.

Feasibility
Consider the feasibility of each idea. Place your ideas on the grid. The higher the feasibility, the higher the idea is placed.

TIP
Participants can use the canvas to place or delete ideas. They can also use the grid to place or delete ideas. The higher the importance, the higher the idea is placed.

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Type here to search

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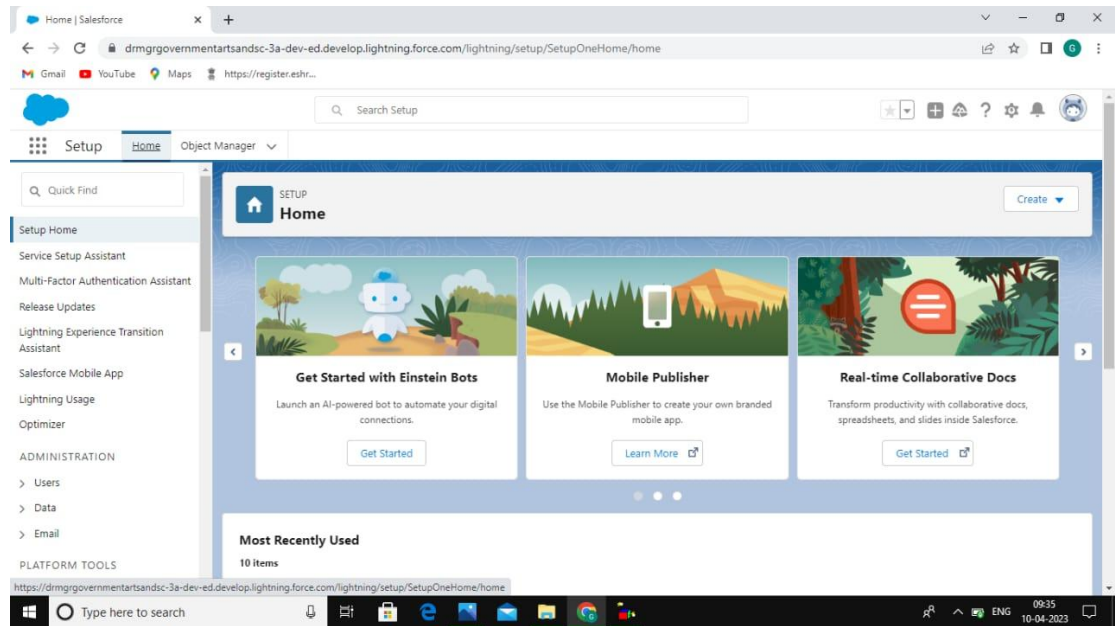
3. RESULT

3.1 Data model

Object name	Field in the object	
candidate	Field label	Data type
	Account name	name
	Account number	Text 40
	Account owner	Lookup user
	Account site	text
	Account source	picklist
	active	picklist
	Annual revenue	currency
	Billing address	address

3.2 Activity & screenshot

MILESTONE -01



MILESTONE -02

The screenshot shows the Salesforce Setup interface for the 'Account' object. The 'Fields & Relationships' section is active, displaying a table of 33+ items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Account Name (Name, indexed), Account Number (Text(40)), Account Owner (Lookup(User), indexed), Account Site (Text(80)), Account Source (Picklist), Active (Picklist), Annual Revenue (Currency(18, 0)), and Billing Address (Address).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active_c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		

MILESTONE -03

The screenshot shows the 'New Lightning App' dialog box in the Salesforce App Manager. The 'App Options' section is displayed, allowing configuration of the app's navigation and form factors. The 'Navigation and Form Factor' section includes options for Navigation Style (Standard navigation selected) and Supported Form Factors (Desktop and phone selected). The 'Setup and Personalization' section includes options for Setup Experience (Setup (full set of Setup options) selected) and App Personalization Settings (Disable end user personalization of nav items in this app selected).

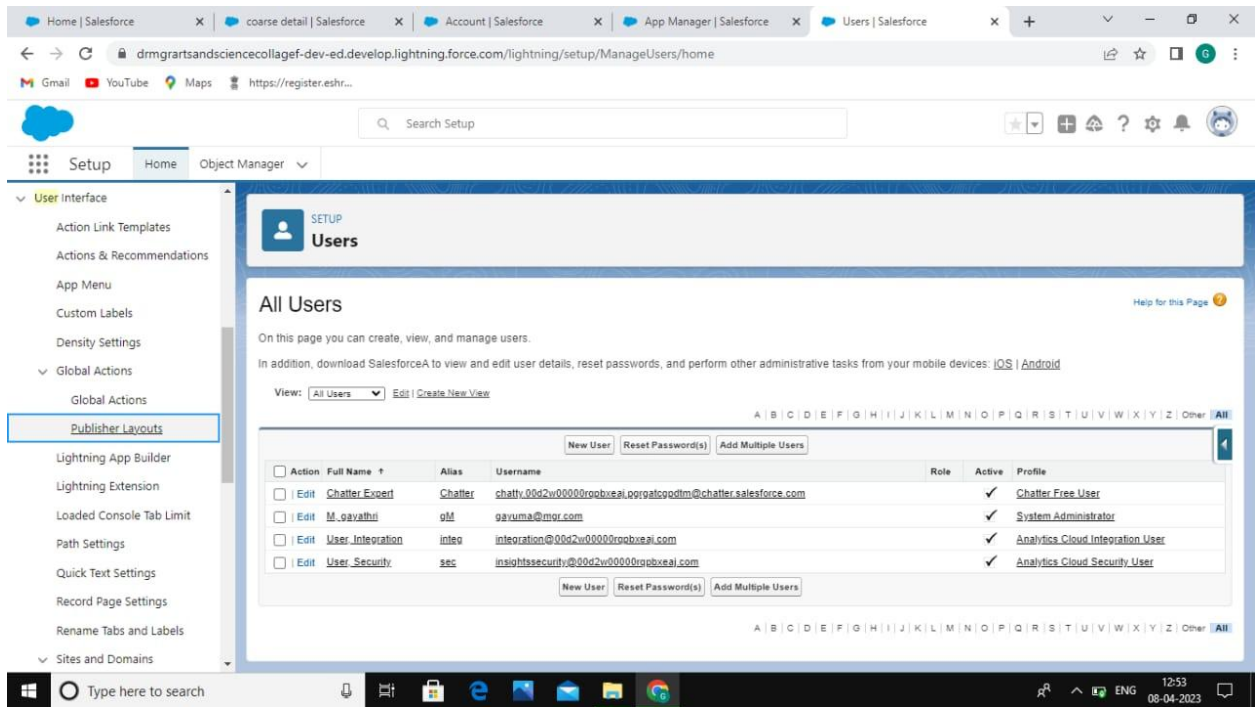
Navigation and Form Factor

- * Navigation Style
 - ☒ Standard navigation
 - ☐ Console navigation
- * Supported Form Factors
 - ☒ Desktop and phone
 - ☐ Desktop
 - ☐ Phone

Setup and Personalization

- Setup Experience
 - ☒ Setup (full set of Setup options)
 - ☐ Service Setup
- App Personalization Settings
 - ☒ Disable end user personalization of nav items in this app
 - ☐ Disable temporary tabs for items outside of this app

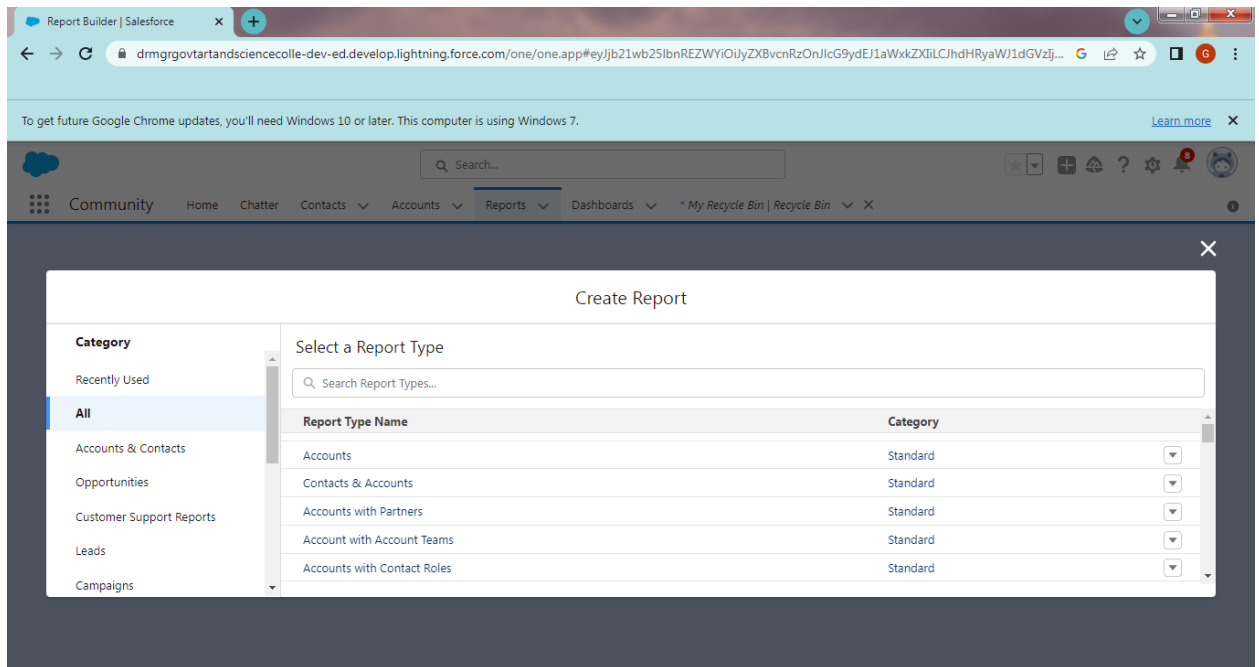
MILESTONE -04



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with categories like User Interface, Global Actions, and Sites and Domains. The 'Publisher Layouts' option is highlighted. The main content area is titled 'All Users' and includes a search bar, a view selector (set to 'All Users'), and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Four users are listed: Chatter Expert, M. gavalathi, User Integration, and User Security. Each user has an 'Edit' link and a checkmark in the 'Active' column. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter_00d2w00000roqbxai.00rpatcopdmi@chatter.salesforce.com		✓	Chatter Free User
Edit	M. gavalathi	glt	gavuma@moy.com		✓	System Administrator
Edit	User Integration	inteo	integration@00d2w00000roqbxai.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w00000roqbxai.com		✓	Analytics Cloud Security User

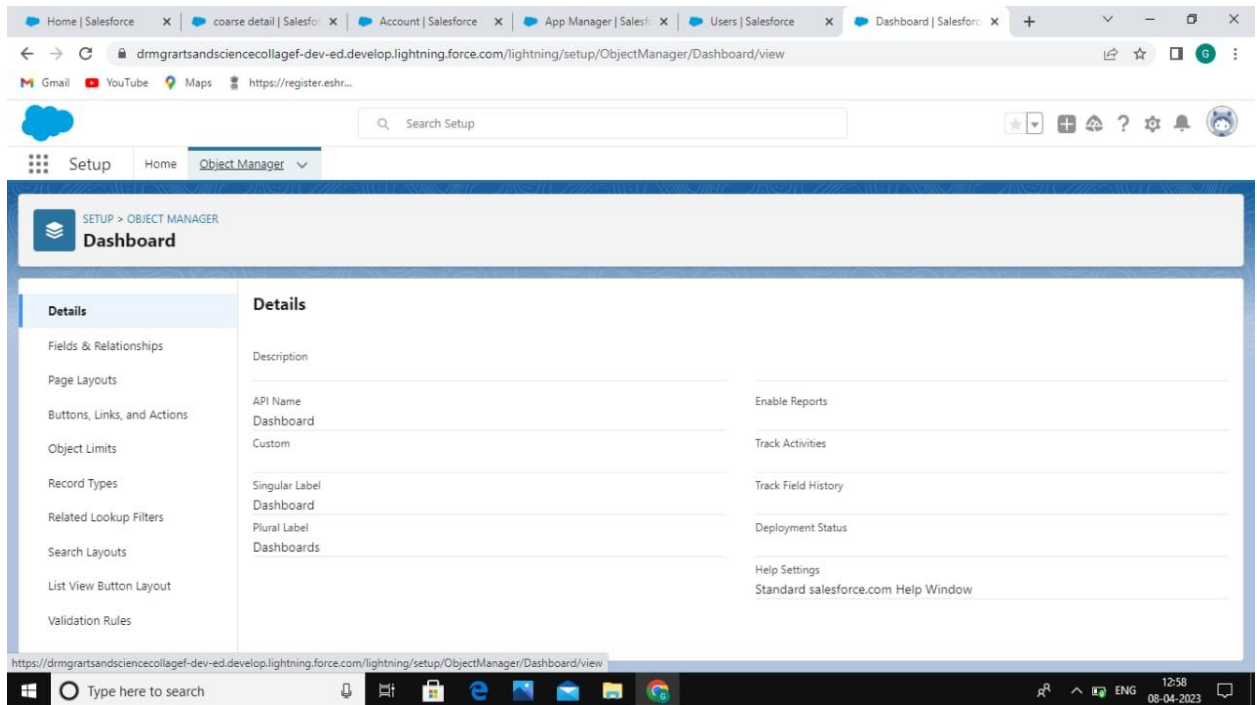
MILESTONE -05



The screenshot shows the 'Create Report' dialog in the Salesforce Report Builder. The dialog has a left sidebar with a 'Category' list and a main area titled 'Select a Report Type'. The 'Category' list includes 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', and 'Campaigns'. The 'All' category is selected. The 'Select a Report Type' area has a search bar and a table of report types. The table has columns for 'Report Type Name' and 'Category'. Five report types are listed: Accounts, Contacts & Accounts, Accounts with Partners, Account with Account Teams, and Accounts with Contact Roles. Each report type has a dropdown arrow in the 'Category' column.

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard

MILESTONE -06



4. Trailhead Profile Public URL

TEAM LEAD -<https://trailblazer.me/id/gayathri2809>

TEAM MEMBER 1 -<http://trailblazer.me/id/gayam36>

TEAM MEMBER 2 -<https://trailblazer.me/id/gnana85>

TEAM MEMBER 3-<https://trailblazer.me/id/gvallal>

5. ADVANTAGES & DISADVANTAGE

A CRM can help you identify customer needs, track feedback, and manage your customer service improvements. The reporting features also allow you to track customer metrics from several different sources, such as help desk metrics, customer satisfaction scores, and more.

Certain businesses where customer transactions are highly standardised may not benefit from a CRM system. A CRM system works best where personalisation is required in client/company interactions and where there are multiple touch-points over time between the client and the business across departments.

The advantages of a CRM system are available to salespeople, marketing teams, customer service professionals, and anybody who interacts with customers in large and small organisations.

6. APPLICATIONS

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

CRM can analyze data and generate reports whenever required. There are mainly three types of CRM applications – Operational, Analytical and Collaborative to perform all these activities.

Web CRM applications are excellent as an add-on service to your desktop application. As such, you will certainly use them when you can not use your own computer or phone. At the same time, they can be used in companies where most employees work with Outlook, but some of them prefer .

7. 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.

CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs

Customer profitability analysis allows you to segment your customers by their profit contribution to your brand and optimize your marketing, customer service, and operations costs around the customer segments who are the most profitable for your brand.

8. FUTURE SCOPE

With the help of a CRM system, companies solve sales problems, increase the productivity of employees, and regularly monitor important financial indicators. According to EPCGroup's analytics, CRMs exploded in 2022, achieving an 11.6% CAGR from 2022 to 2027.

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.

Report Overview. The global customer relationship management market size was valued at USD 58.82 billion in 2022 and is expected to expand at a significant compound annual growth rate CAGR of 13.9% from 2023 to 2030.