Project Report Template

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1.INTRODUCTION

Customer Relationship Management (CRM) systems are a powerful tool for tracking and managing interactions with customers and clients. However, they can also be used to manage relationships with other stakeholders, such as job candidates. In this context, a CRM system can be used to track the progress of candidates through the recruitment process, from initial contact to hiring and beyond.

1.1 OVERVIEW

One specific use case for a CRM system in the recruitment context is tracking the results of a candidate with internal marks. Internal marks are scores or evaluations that are generated by an organization's internal systems or processes, such as exams, assessments, or performance evaluations. By integrating internal marks into a CRM system, recruiters and hiring managers can gain a more holistic view of a candidate's qualifications, skills, and potential fit for a role

1.2 PURPOSE

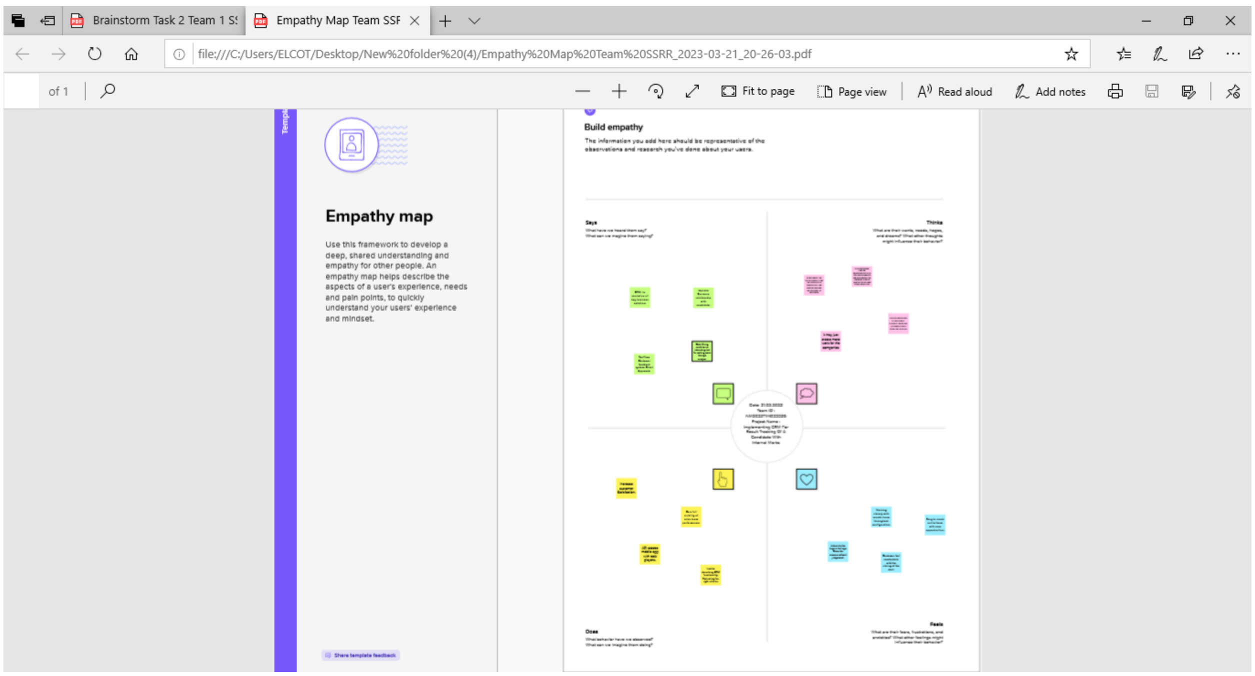
Define your objectives: Before implementing a CRM system, it's important to define your objectives. In this case, the objective is to track the results of a candidate with internal marks.

Choose a CRM software: There are many CRM software options available in the market. Some popular options are Salesforce, HubSpot, Zoho CRM, and Microsoft Dynamics 365. Choose the one that best suits your needs and budget.

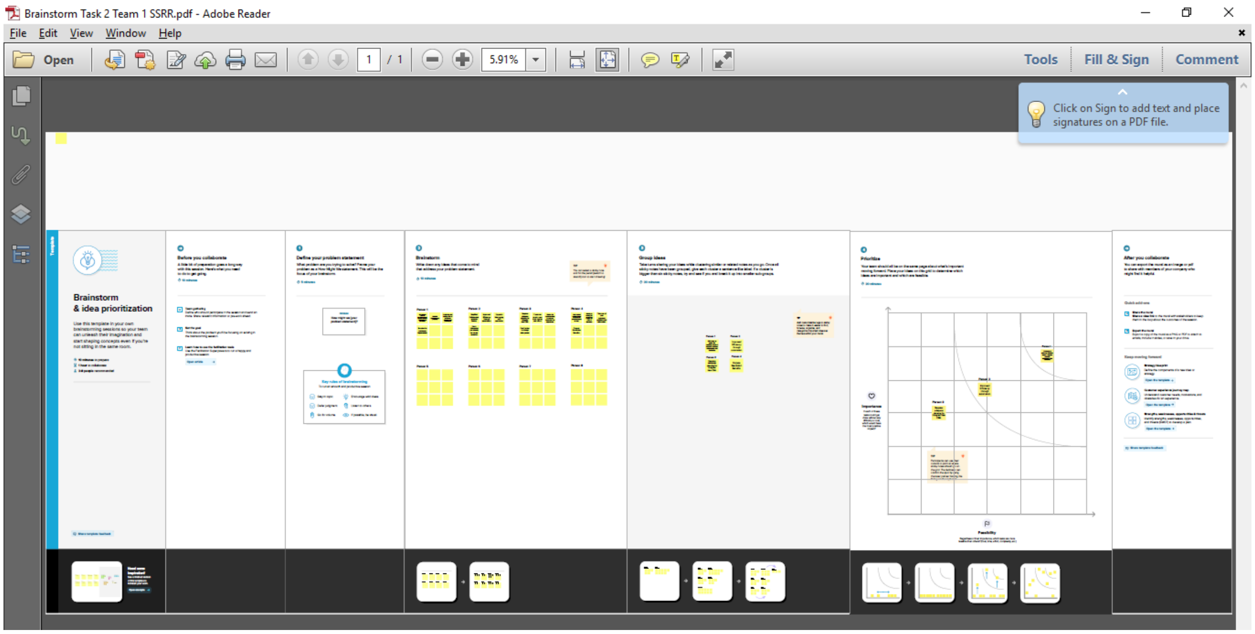
Customize the software: Once you’ve selected the CRM software, customize it to fit your specific requirements. You may need to add custom fields for internal marks and other relevant data.

2.PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



3.RESULT

3.1 Data Model

<table>
<tr><th>Object Name</th><th>Fields in the Object</th></tr>
<tr><td>Semester</td><td><table><tr><td>Field Label</td><td>Date Type</td></tr><tr><td>Semester</td><td>Text</td></tr></table></td></tr>
<tr><td>Candidate</td><td><table><tr><td>Field Label</td><td>Date Type</td></tr><tr><td>Candidate</td><td>Text</td></tr></table></td></tr>
<tr><td>Course Details</td><td><table><tr><td>Field Label</td><td>Date Type</td></tr><tr><td>Course Details</td><td>Text</td></tr></table></td></tr>
<tr><td>Lecturer Details</td><td><table><tr><td>Field Label</td><td>Date Type</td></tr><tr><td>Lecturer Details</td><td>Text</td></tr></table></td></tr>
<tr><td>Internal Results</td><td></td></tr>
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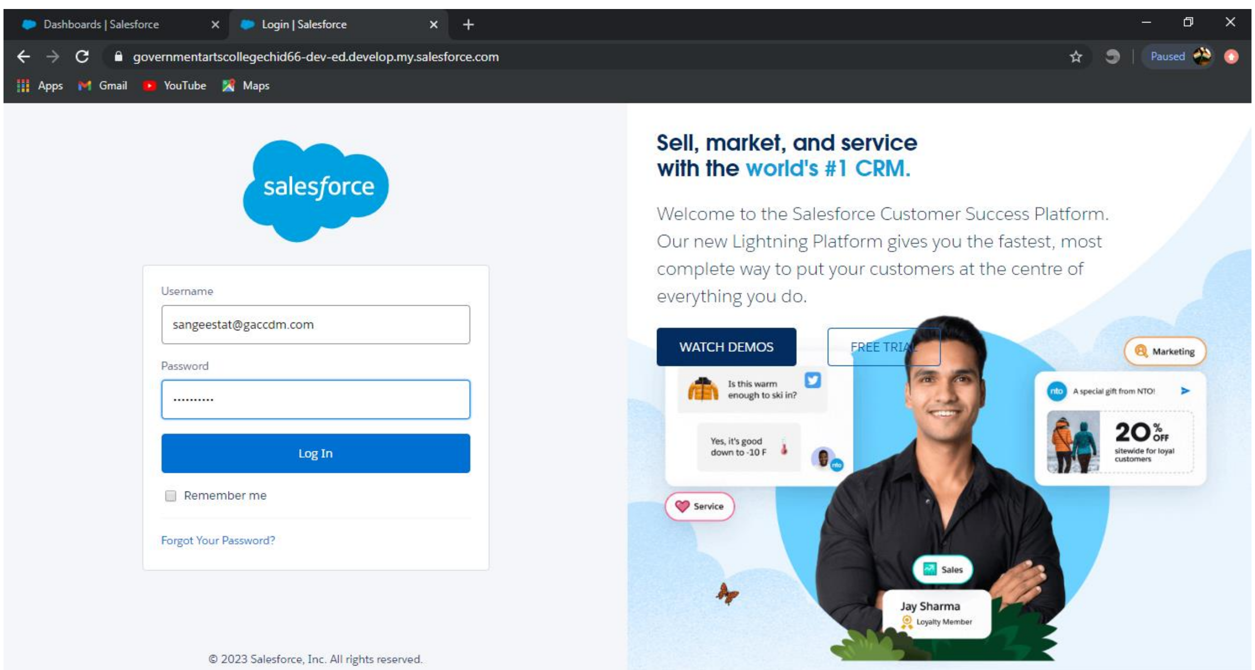
	Field Label	Date Type
	Internal Results	Text

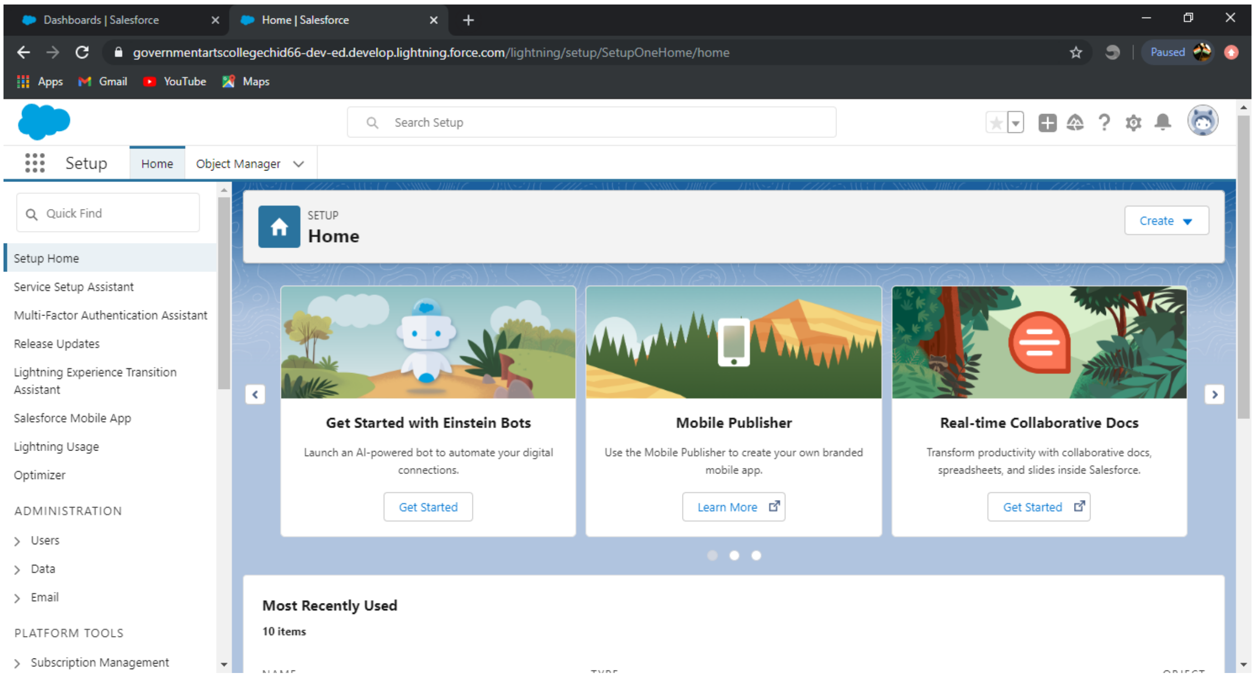
3.2.Activity & Screenshot

Milestone 1 : Creation Saleforce Org



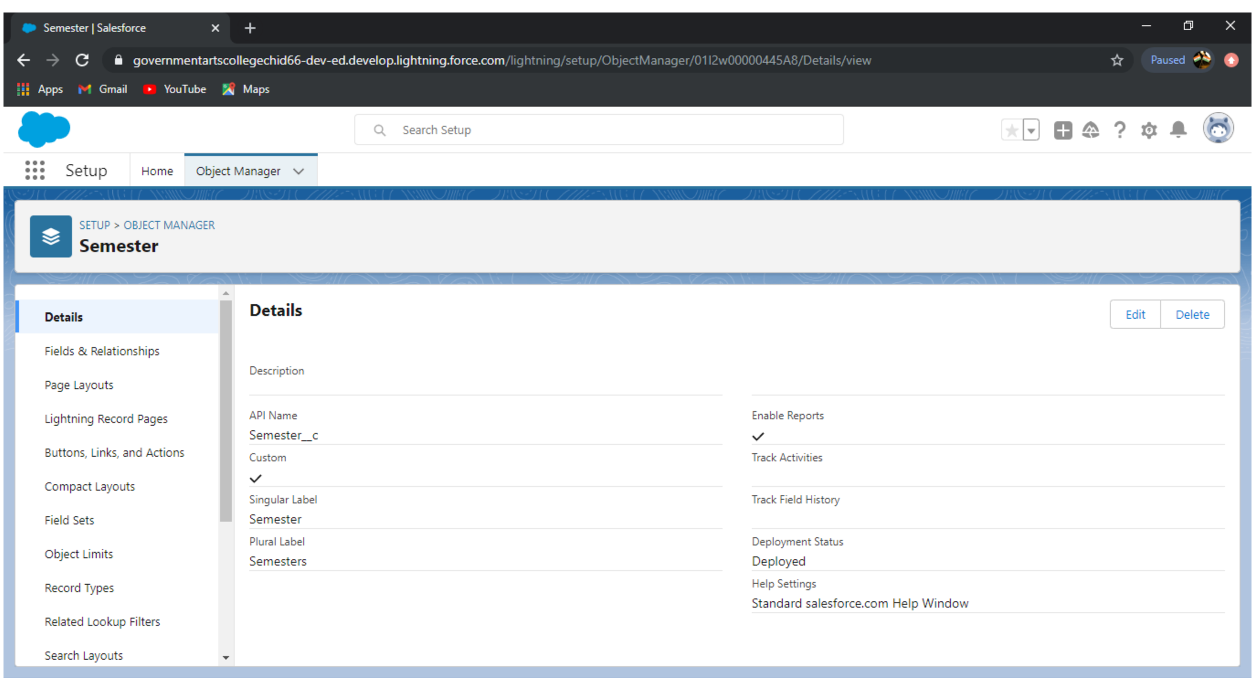
Activity 1 :

Salesforce Login

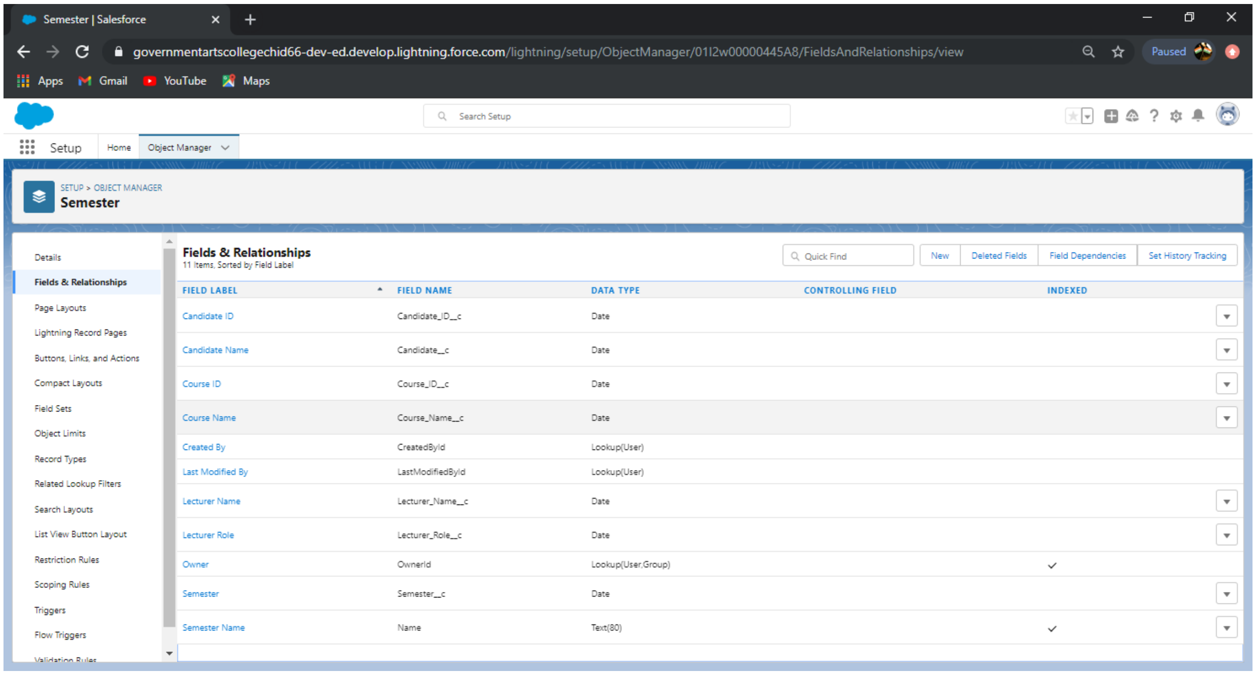


Milestone 2 :Object

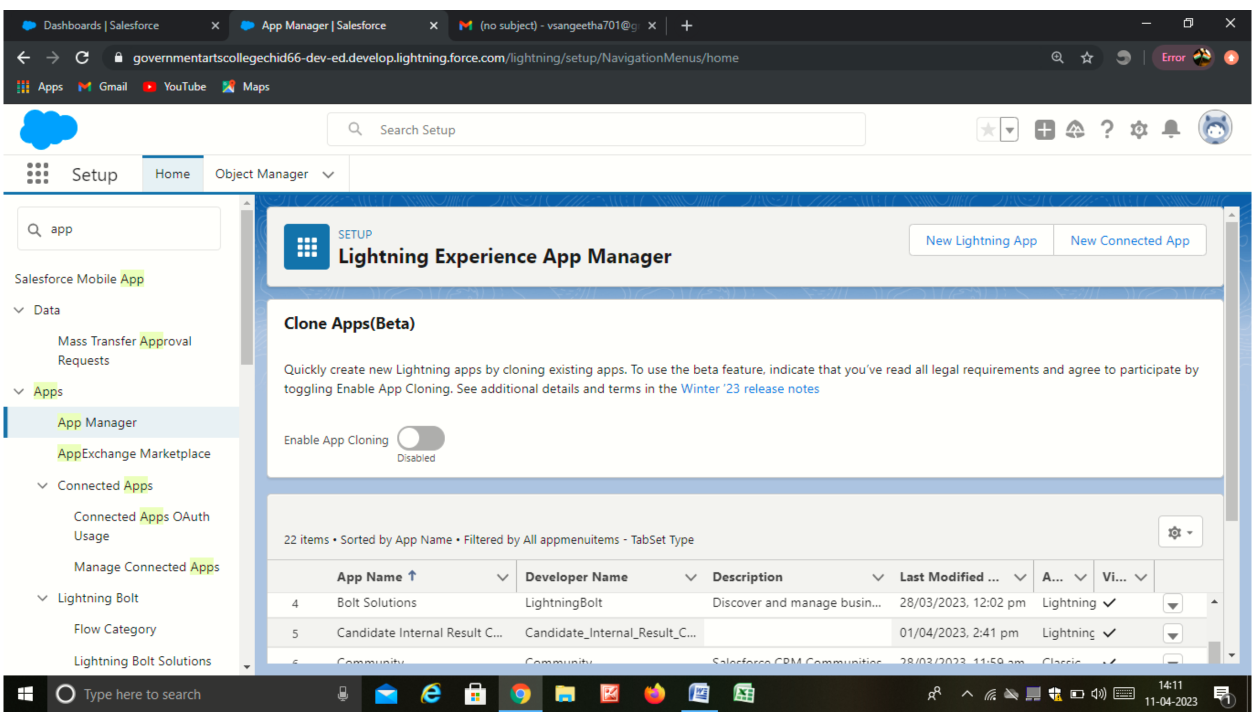
Activity-1



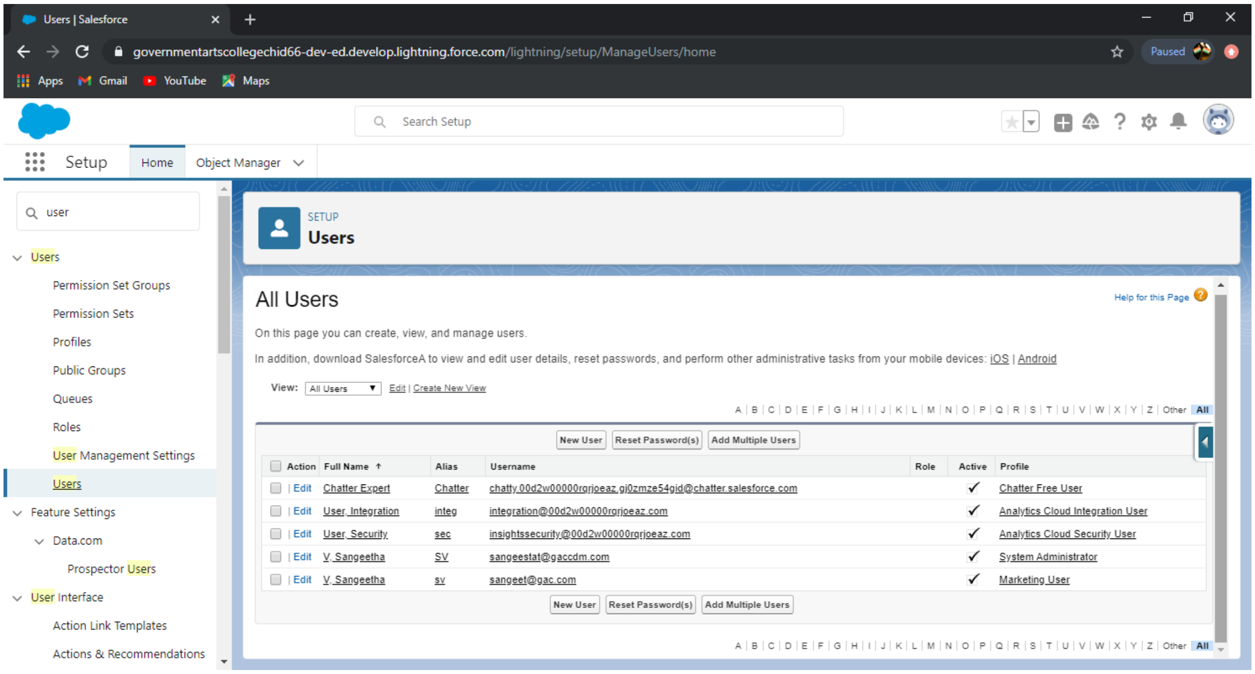
Milestone-2: Fields and Relationships



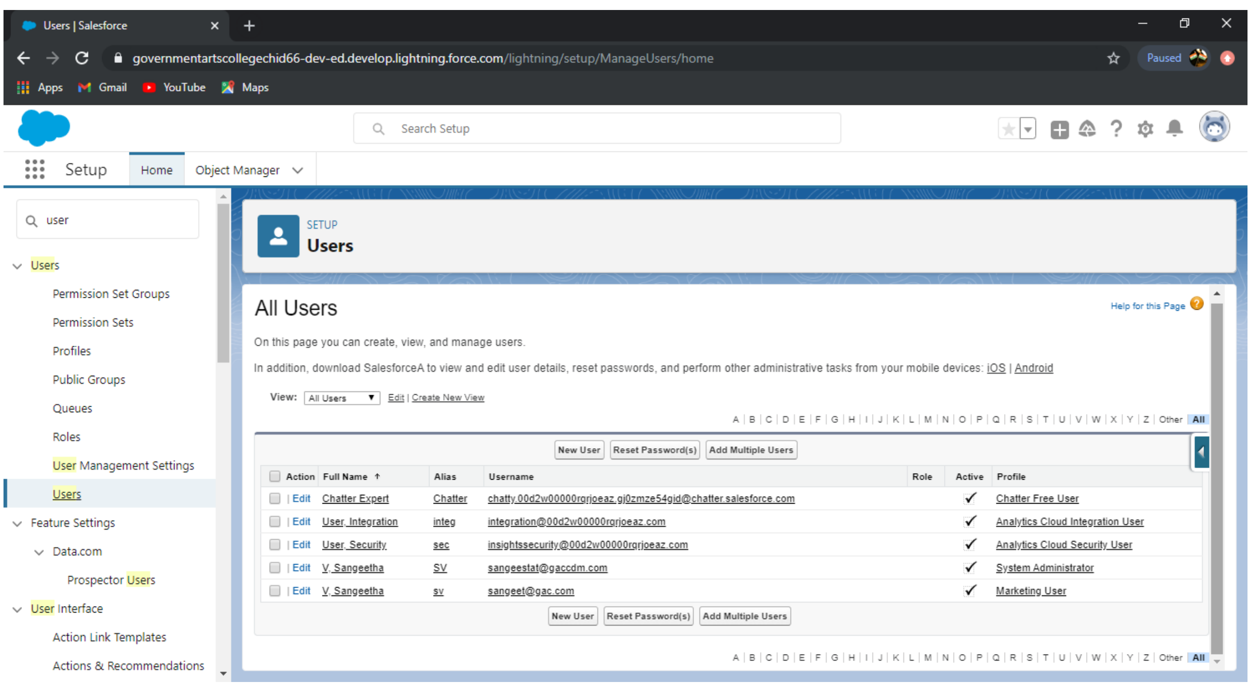
Milestone 3. Lightening App



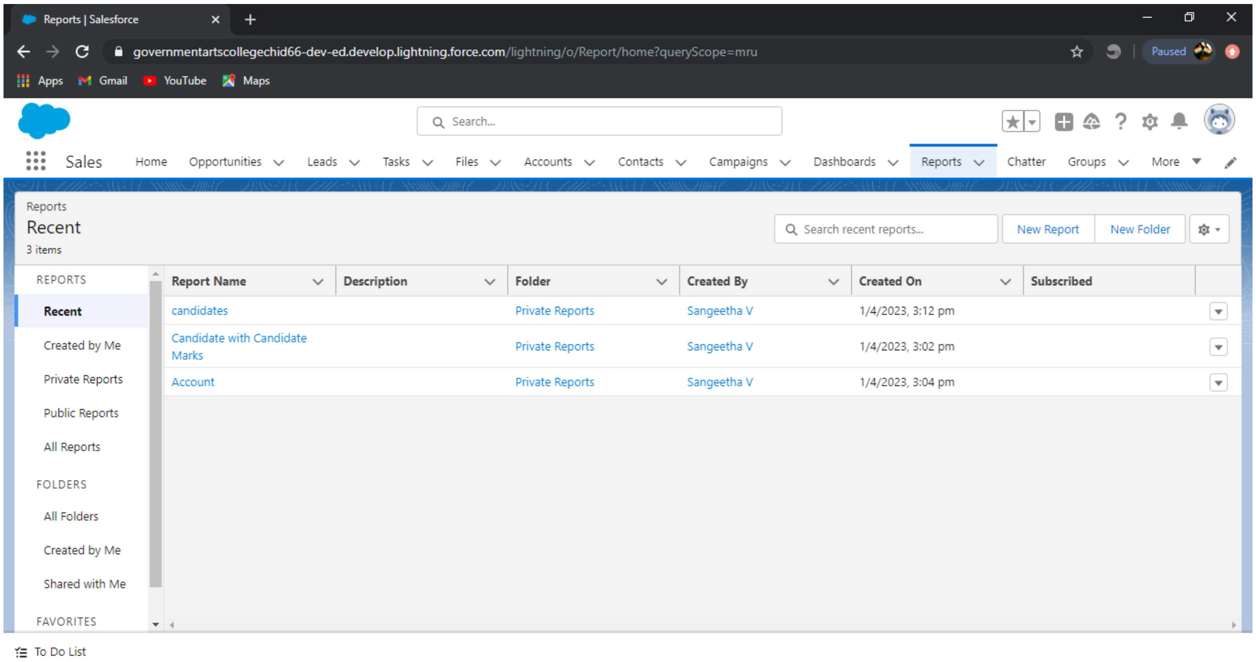
Milestone:4.Users



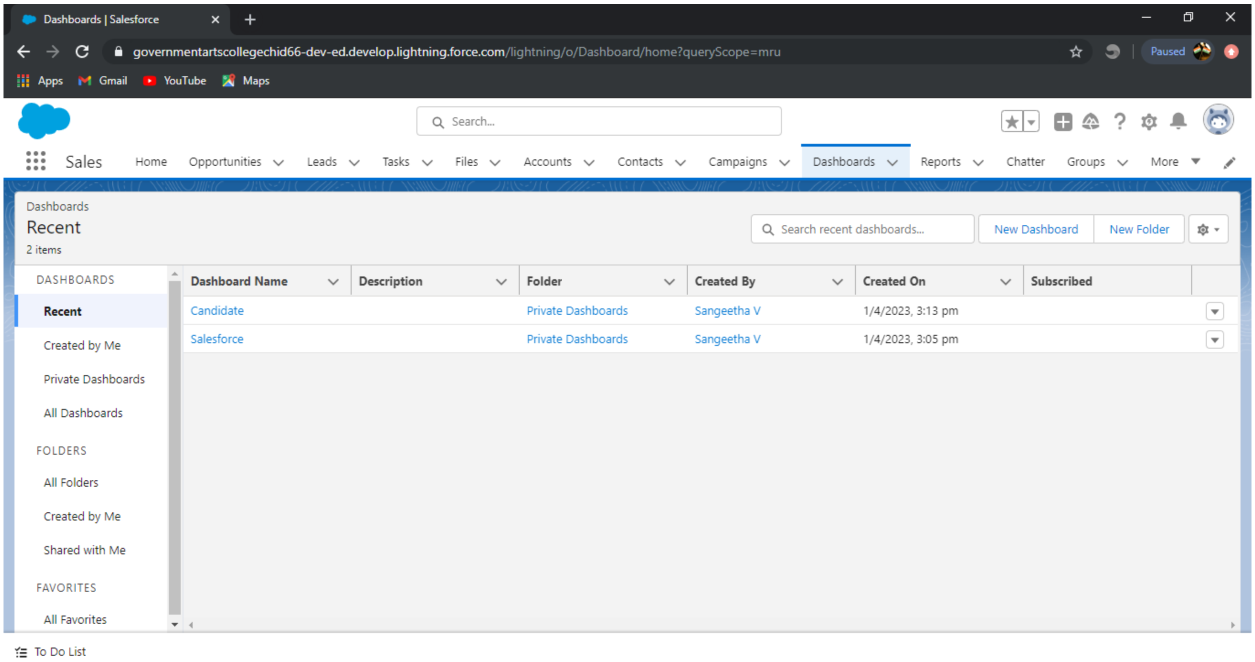
Milestone:4.Users



Milestone 5. Reports



Milestone:6.Dashboards



4.Trailhead Profile Public URL

Team Lead – https://trailblazer.me/id/sangv12

Team Member 1 - https://trailblazer.me/id/smazhavai

Team Member 2 - https://trailblazer.me/id/rragulraj2003

Team Member 3 - https://trailblazer.me/id/rgopal100

5.ADVANTAGES & DISADVANTAGES

Centralized tracking: A CRM system allows for centralized tracking of a candidate's results, making it easy for multiple stakeholders such as teachers, administrators, and parents to access the same information.

Real-time updates: With a CRM system, results can be updated in real-time as soon as they are available, providing timely information for decision-making and evaluation.

Customization: A CRM system can be customized to meet the specific needs of a school or educational institution, with features such as data analytics and reporting that can provide valuable insights into a candidate's performance.

Collaboration: A CRM system can facilitate collaboration between teachers and administrators, allowing for a more coordinated approach to student assessment and tracking.

DISADVANTAGES

Cost: Implementing a CRM system can be expensive, especially for smaller educational institutions with limited budgets.

Complexity: A CRM system can be complex to set up and maintain, requiring technical expertise and ongoing support.

Resistance to change: Some stakeholders may resist the implementation of a new system, particularly if it requires changes to established practices and processes.

Data security: A CRM system requires careful management of data security and privacy, particularly if it includes sensitive information such as student performance data.

6.APPLICATION

Identify the requirements: The first step is to identify the requirements of the CRM system. In this case, the system should be able to track the internal marks of a candidate and provide updates on their results.

Select a CRM platform: There are many CRM platforms available, such as Salesforce, HubSpot, Zoho, etc. Select a platform that suits your requirements and budget.

Customize the CRM platform: Once you have selected a CRM platform, customize it to suit your needs. Create fields to capture the candidate’s information such as name, roll number, course, semester, etc. Create fields to capture the internal marks of the candidate.

Integrate with the internal marks application system: Integrate the CRM platform with the internal marks application system. This can be done through APIs or other integration methods. The integration should allow the CRM system to receive updates on the internal marks of the candidate.

7.CONCLUSION

Choose a CRM system: There are many CRM systems available, so it’s important to choose one that fits your needs. Look for a system that can handle the volume of data you expect to generate, and that has the features you need to track the candidate’s results effectively. Consider factors such as cost, ease of use, and support options when making your selection.

Set up your system: Once you have chosen a CRM system, you will need to set it up to track the candidate’s internal marks. This may involve creating custom fields to capture the data you need, setting up automated workflows to ensure that data is entered correctly and consistently, and configuring reports or dashboards to visualize the data in a way that is meaningful to you.

Train your staff: A CRM system is only as effective as the people using it, so it’s important to train your staff on how to use the system to track the candidate’s results. Make sure everyone knows how to enter data accurately, how to access the information they need, and how to interpret the data.

In conclusion, implementing a CRM system to track a candidate's internal marks can be a valuable tool for identifying areas where they may need additional support, and for making decisions about promotions or other opportunities. By following these steps, you can set up a system that meets your needs and helps you achieve your goals

8.FUTURE SCOPE

Determine the requirements: Identify the data points that need to be tracked for each candidate, including their personal details, academic history, and internal assessment marks.

Select a CRM tool: Choose a CRM tool that can handle the requirements and has the features you need. Salesforce, HubSpot, Zoho CRM are some popular options.

Set up the system: Set up the CRM system to capture the data points you need. Create custom fields for candidate details and academic history. Configure automation to import data from other sources such as spreadsheets or databases.

Integrate with other systems: Integrate the CRM system with other systems such as learning management systems, student information systems, and assessment systems to automatically capture data and keep it up-to-date.

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