



## 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.

### 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.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map Canvas

2.2

Brainstorming & Idea Prioritaton Template

3

RESULT

3.1

Data Model:

Object Name	Fields in the Object	
School		
	Field label	Data type
	Address	Text area
	District	Text area
	State	Text area
	School	Text area
	Phone Number	Phone
	No of Students	Roll up Summary
	Highest Mark	Roll up Summary

## Student

Field label	Data type
Phone Number	Phone
School	Master-Detail Relationship
Result	Picklist
Class	Number

## Parent

Field label	Data type
Parent Address	Text Area
Parent Number	Phone

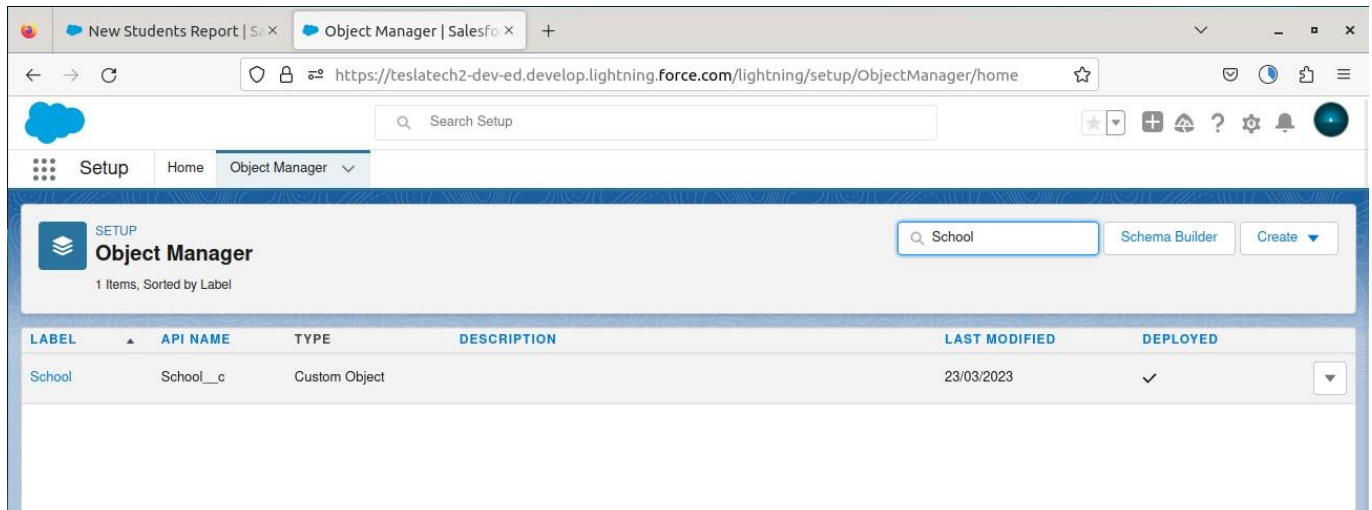
3.2

### Activity & Screenshot

(Milestone-2:OBJECT)

#### Activity-1 : Creaton of School Object

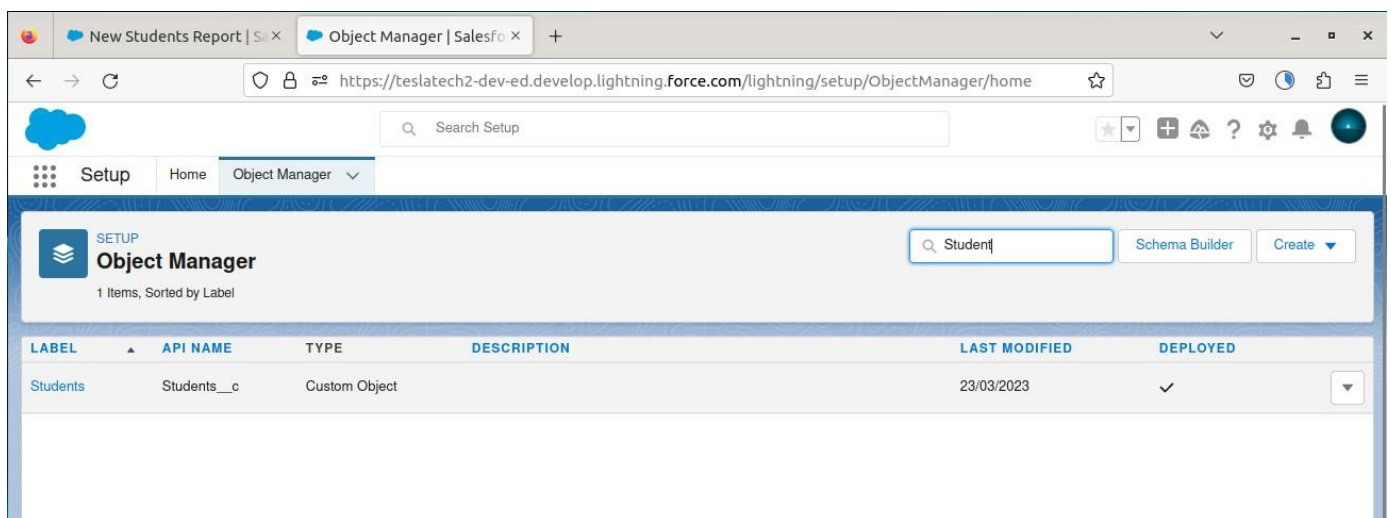
# Creaton of Object for School Management



( Milestone-2:OBJECT )

## Activity-2 : Create Student Object

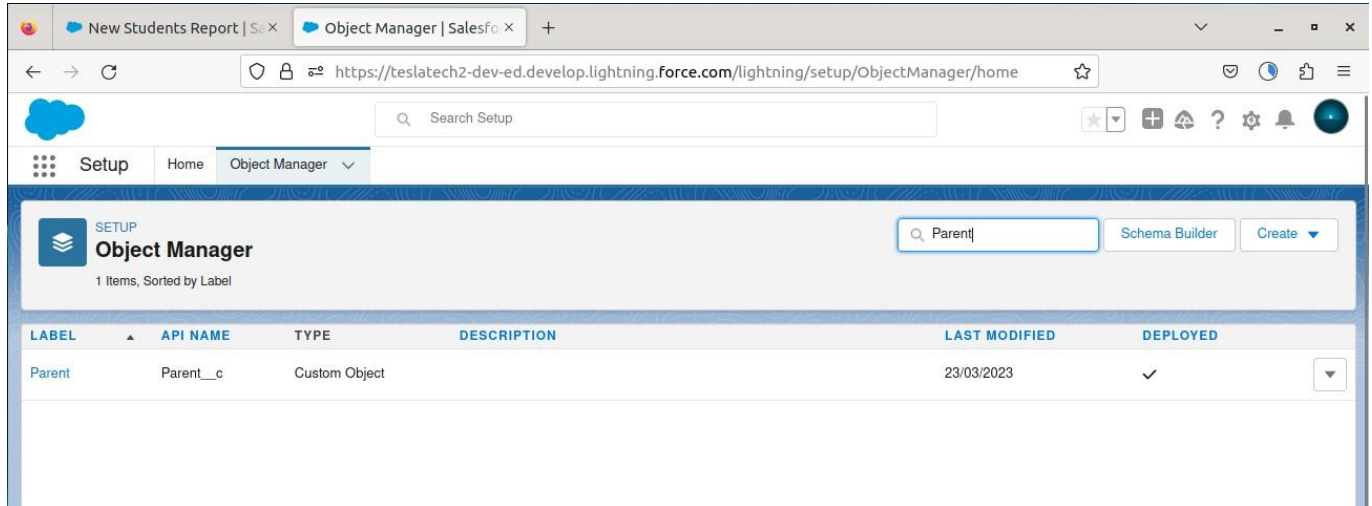
# Creaton of Student Object



( Milestone-2: OBJECT )

## Activity-2 : Create Parent Object

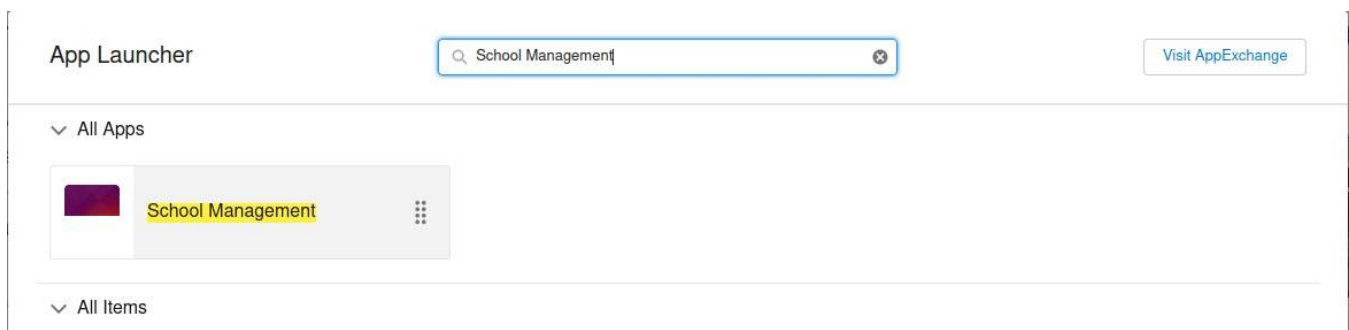
### # Creaton of Parent Object



( Milestone-3: LIGHTNING APP )

## Activity-1 : Create the School Management App

### # Creaton School Management App



( Milestone-4: FIELDS & RELATIONSHIP )

## Activity-1 : Creaton of felds for the School Objects

## # Creaton of felds for the School Object

The screenshot shows the Salesforce Setup interface for the 'School' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 9 fields, sorted by Field Label. The fields are: Address, Created By, District, Last Modified By, Owner, Phone Number, School Name, and State. Each field row displays its label, name, data type, controlling field, and indexed status. The 'Owner' and 'School Name' fields are marked as indexed with a checkmark. The 'State' field is also marked as indexed with a checkmark. The 'Address' field is a Text Area (255). The 'Created By' field is a Lookup (User). The 'District' field is a Text Area (255). The 'Last Modified By' field is a Lookup (User). The 'Phone Number' field is a Phone. The 'School Name' field is a Text (80). The 'State' field is a Text Area (255).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
State	State__c	Text Area(255)		

( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-2 : Creaton of felds for the Student Objects

## # Creaton of felds for the Student Object

The screenshot shows the Salesforce Lightning Setup interface for the 'Students' object in the 'Object Manager'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows 8 items sorted by Field Label. A table lists the fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Class, Created By, Last Modified By, Marks, Owner, Phone Number, Results, and Students Name. The 'Owner' and 'Students Name' fields are marked as indexed and have a checkmark in the Controlling Field column.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
Students Name	Name	Text(80)		✓

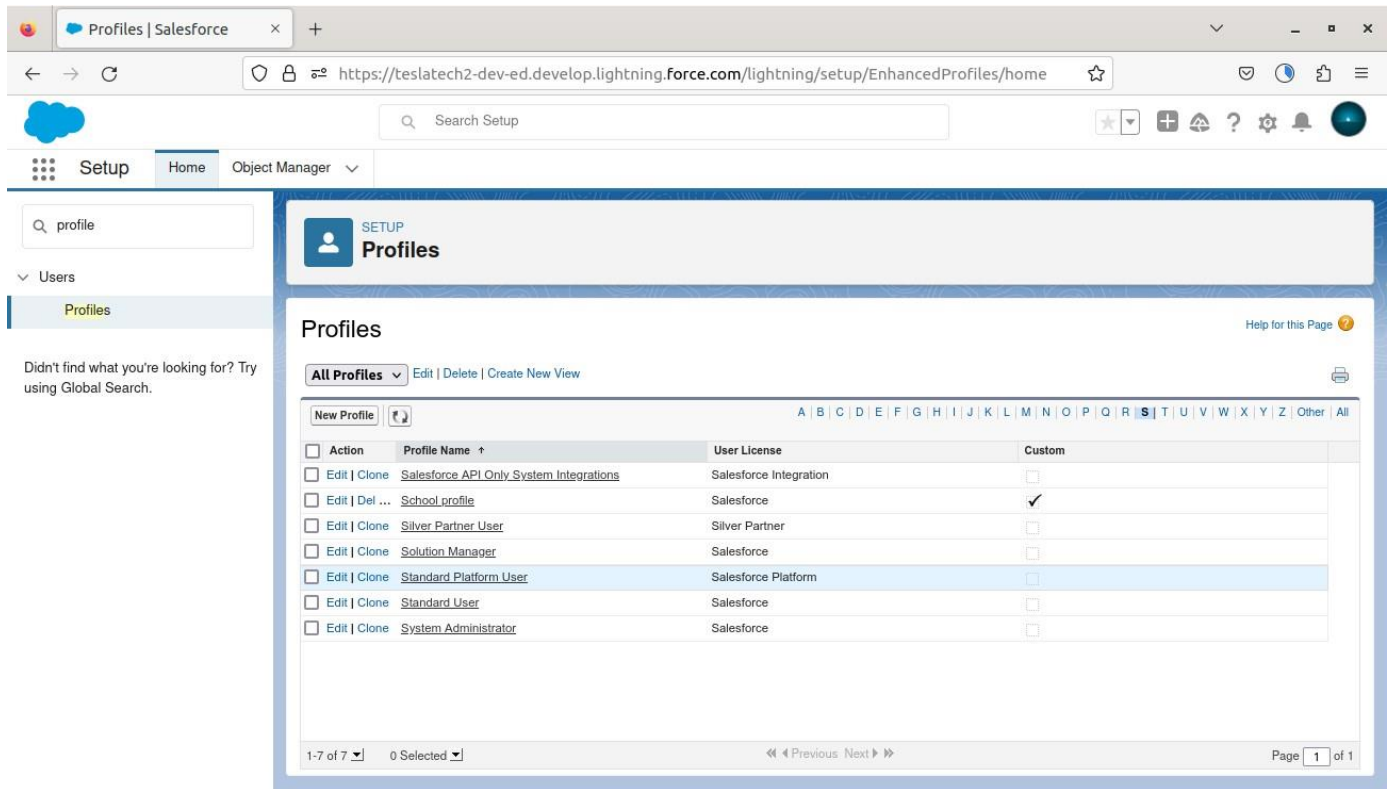
( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-3 : Creaton of fields for the Parent Objects

## # Creaton of felds for the Parents Object







The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' entered, and a list of navigation items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and includes a 'Help for this Page' link. Below the title, there are tabs for 'All Profiles', 'Edit', 'Delete', and 'Create New View'. A 'New Profile' button is also present. The main table lists various profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Standard Platform User' profile is highlighted. At the bottom, there is a pagination bar showing '1-7 of 7' items, '0 Selected', and 'Page 1 of 1'.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del ...</a>	School profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>

( Milestone-6: USERS )

### Activity-1 : Creatng a Users

# Creatng a Users

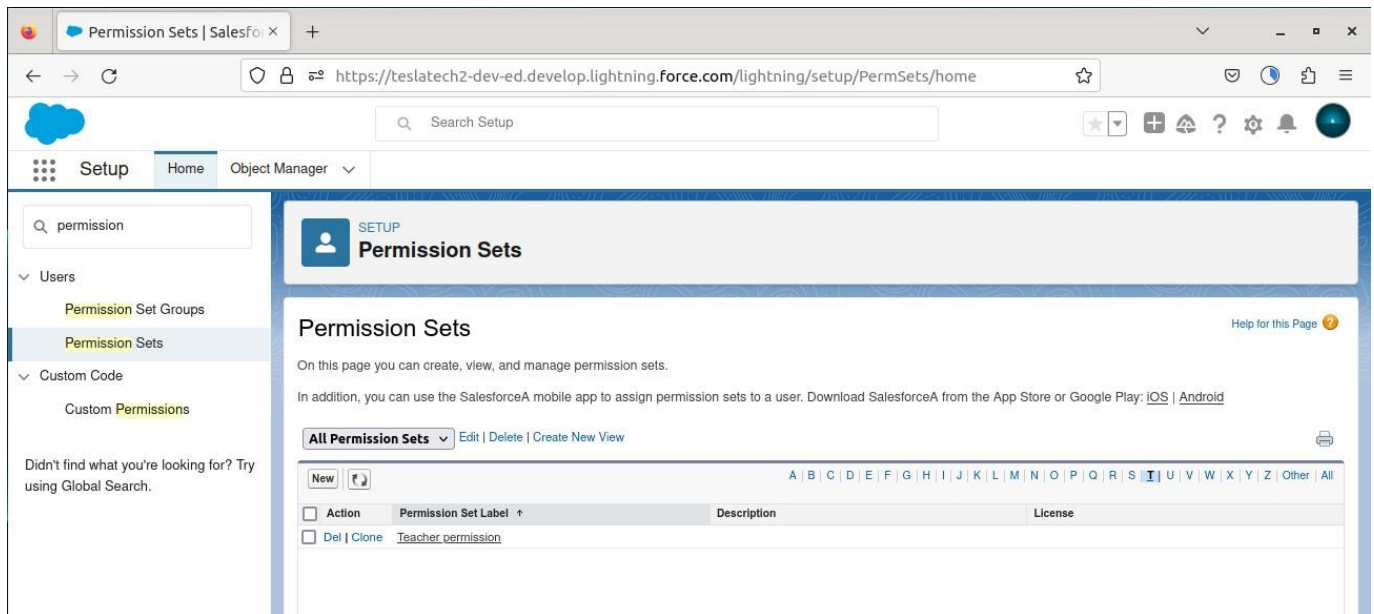
The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a description: 'On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android'. Below this is a 'View: All Users' dropdown and links for 'Edit' and 'Create New View'. A table lists users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes users like Chatter Expert, P. SACHINDRA, S. Parent, S. Principal, S. Teacher, User Integration, and User Security. At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty00d2w0000rk1yeead.580apckcvayk@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	P. SACHINDRA	SP	sachindra@teslatech.sandbox		✓	System Administrator
<input type="checkbox"/>   Edit	S. Parent	ps	parent@acme.com		✓	School profile
<input type="checkbox"/>   Edit	S. Principal	ps	principal@s.com		✓	Standard Platform User
<input type="checkbox"/>   Edit	S. Teacher	ts	teachers@good.com		✓	Standard Platform User
<input type="checkbox"/>   Edit	User Integration	integ	integration@00d2w0000rk1yeead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightssecurity@00d2w0000rk1yeead.com		✓	Analytics Cloud Security User

( Milestone-7: PERMISSION SETS )

## Activity-1 : Permission sets 1:

# To Set Permissions

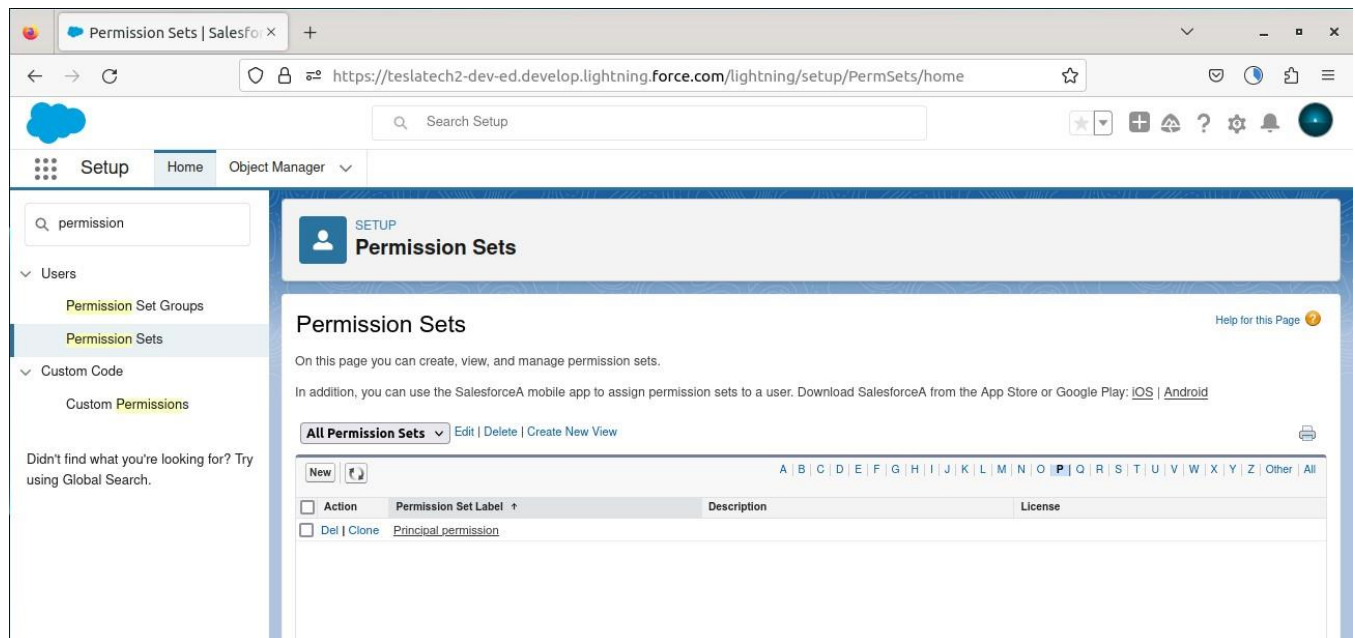


The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a search bar with 'permission' and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a sub-header 'All Permission Sets' with links for Edit, Delete, and Create New View. Below this is a table with columns for Action, Permission Set Label, Description, and License. The table contains one entry: 'Teacher permission'.

( Milestone-7: PERMISSION SETS )

## Activity-2 : Permission sets 2:

# To Set Permissions



This screenshot is similar to the previous one, but the table in the main content area now shows a 'Principal permission' instead of 'Teacher permission'. The rest of the page layout, including the sidebar and navigation, remains the same.

( Milestone-8: REPORTS )

**Activity-1 : Reports**

# Reports

The screenshot shows the Salesforce Reports page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, and More. The main content area is titled 'Reports' and 'Recent' (3 items). It features a search bar and buttons for 'New Report' and 'New Folder'. Below is a table of recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Students Report		Private Reports	SACHINDRA P	14/4/2023, 10:47 am	
Created by Me	New Schools Report		Private Reports	SACHINDRA P	14/4/2023, 10:45 am	
Private Reports	New Parents Report		Private Reports	SACHINDRA P	30/3/2023, 6:07 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

At the bottom left, there is a 'To Do List' icon.

#### 4 TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD - <https://trailblazer.me/id/srida23>

Team Member 1 - <https://trailblazer.me/id/mohan32>

Team Member 2 - <https://trailblazer.me/id/sivac54>

Team Member 3 - <https://trailblazer.me/id/vijai8870>

#### 5 ADVANTAGES & DISADVANTAGES

[ADVANTAGES]

### 1. Better customer service

Modern CRM software has many functions, but the software was created to improve business-customer relationships, and that's still its main benefit. A CRM manages all of your contacts and gathers important customer information—like demographics, purchase records and previous messages across all channels—and makes it easily accessible to anyone in your company who needs it. This ensures that your employees have all they need to know about the customer at their fingertips and can provide a better customer experience, which tends to boost customer satisfaction.

### 2. Increased sales

A CRM tool can help you streamline your sales process, build a sales pipeline, automate key tasks and analyze all of your sales data in one centralized place, potentially increasing sales and productivity. A CRM helps you establish a step-by-step sales process that your employees can rely on every time and that you can easily tweak as issues arise.

### 3. Improved customer retention

Once you've procured and converted leads, it's vital that you put in the work to retain them as customers and promote customer loyalty. High customer turnover can have many negative effects for your business, like diminished revenue or disrupted cash flow, so use your CRM and the information it provides about your customers to encourage repeat business. The CRM will provide sentiment analysis, automated ticketing, customer support automation and user behavior tracking to help you determine problems and quickly address them with your customers.

### 4. Detailed analytics

It's one thing to have plenty of data about your customers, but you need to know what it means and how to use it. CRM software typically has built-in analytics capabilities to contextualize data, breaking it down into actionable items and easily understood metrics. Metrics such as click-through rates, bounce rates, and demographic information allow you to judge the success of a marketing campaign and optimize accordingly.

## 5. Higher productivity and efficiency

CRM software uses marketing automation technology, which expedites menial tasks like drip campaigns and frees up your employees' time to focus on work only humans can handle, like creating content. It can also ensure that no tasks slip through the cracks (e.g., all important emails are always sent to the right people). Additionally, a CRM can show you a dashboard of how your business processes are working and where your workflows could improve. [Read related article: How Workplace Automation Software Can Help Your Business]

## 6. Automated sales reports

Your team can easily collect and organize data about prospective and current customers using the CRM software's dashboard and reporting features, which allow employees to automate and manage their pipelines and processes. The CRM can also help your team members evaluate their performance, track their quotas and goals, and check their progress on each of their projects at a glance.

## **[DISADVANTAGES]**

### 1. A costly project

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data migration, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

### 2. Have poor usability



Some CRM systems could be more user-friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.

### 3. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

### 4. Having lots of security concerns

There are many security issues with CRM, such as data loss and data being hacked by someone. In CRM, the collected data is stored at one centralized location that can be accessed by unfair means. In another case, inaccurate data can be added by employees, or they manipulate figures leading to wrongful planning.

### 5. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

### 6. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

### 7. Experience-based procedure in all the stages

Small businesses may not require it, but large businesses use CRM on a large scale. For this purpose, they train their employees by providing training sessions from the appointed professionals. The company invests in employee training to improve

its productivity, where employees encounter and learn the various features and functions of CRM. This experience will help them in all the stages of CRM.

## **6**

### **APPLICATIONS**

( Applications of a CRM – Examples and Strategies )

- \* Application 1: Tracking Customers
- \* Application 2: Collecting Data for Marketing
- \* Application 3: Improving Interactions and Communications
- \* Application 4: Streamlining Internal Sales Processes
- \* Application 5: Planning Your Operations.

## **7**

### **CONCLUSION**

Business is an ongoing process that has to update itself with time (adopt new technologies) to remain in the competition.

Before technology, customer data or CRM was based on papers, but slowly, companies started tracking customer-related data with spreadsheets, emails, address books, and other ways.

But due to a lack of automation and integration, it becomes difficult for them to find and share up-to-date information when required quickly. It also hampers their ability to create marketing strategies, provide customers flawless service, and pursue new sales leads.

CRM is a powerful tool that automatically collects information about existing and prospective customers (their personal or professional information, including social media posts, phone numbers, email addresses, phone numbers, service, purchase history, and support tickets). Further, the whole information is integrated by the system and generates consolidated profiles

that can be shared with appropriate teams. One of the best features of CRM is that it can connect with other business tools, such as document-sharing apps and online chat.

Artificial intelligence and business intelligence capabilities are built in CRM that accelerate administrative tasks and provide actionable insights. Customer relationship management's advantages and disadvantages will help you understand it in detail.

## **8**

### **FUTURE SCOPE**

(Image result for crm future scope)

“[The future of CRM is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations.”

# Future of CRM

## What To Expect

Customer Intelligence  
Is King

1

5

CRM as a  
Single Source of Truth

AI, BI and Beyond

2

6

More, Deeper  
Automations

APIs and Integrations

3

7

Personalization Is Key

Keeping Customers Happy  
Keeps Them Coming Back

4