SE PROJECT SYNOPSIS

CRM SOFTWARE

TEAM MEMBERS

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PROJECT DESCRIPTION

Synopsis:

In today's highly competitive business landscape, maintaining strong relationships with customers is paramount for the success of any organization. To streamline customer interactions, enhance customer satisfaction, and drive business growth, our software engineering project aims to develop a comprehensive Customer Relationship Management (CRM) software solution.

Project Overview:

Our Customer Relationship Management software project aims to create a robust and user-friendly CRM system that will assist businesses in managing their customer data, interactions, and relationships efficiently. The software will be designed to cater to a wide range of industries and business sizes.

Here are four important features that should be prioritized in Customer Relationship Management (CRM) software:

FEATURES

1. Contact Management:

-. It allows users to store, organize, and update customer information, including names, contact details, job titles, and company affiliations.

- Advanced contact management may include the ability to segment contacts into different categories or groups, making it easier to target specific audiences with tailored marketing campaigns.

2. Interaction Tracking:

- CRM software should record all customer interactions, including emails, phone calls, meetings, and support tickets.

- This feature helps sales teams follow up on leads, customer support teams address issues efficiently, and marketing teams track campaign engagement.

3. Sales and Opportunity Management:

- This includes tracking leads, converting them into opportunities, and monitoring the progress of deals through various stages.

- Forecasting features can provide insights into potential revenue and help sales teams prioritize their efforts.

4. Analytics and Reporting:

- Robust analytics and reporting capabilities are essential for extracting meaningful insights from customer dat

- Users should be able to generate reports on key performance indicators (KPIs), such as sales conversion rates, customer acquisition costs, and customer satisfaction scores.

PLAN OF WORK

Contact Management: First, we figure out what info we need to store about our customers, like their names and contact details. Then, we set up the computer part to save all this info and make screens where we can add and change customer details easily.

Interaction Tracking: Next, we think about how we keep track of when we talk to customers, like emails and phone calls. We make sure these interactions are connected to the right customers in our system.

Sales and Opportunity Management: Now, we plan how to manage our sales process. We decide the different steps for selling stuff and make a system for keeping track of these steps. We also create screens for adding and updating sales opportunities.

Analytics and Reporting: Lastly, we look at the numbers that tell us how we're doing. We decide which numbers are most important, like how many sales we make and how happy our customers are. Then, we build tools to show us these numbers in reports and on dashboards.

We can work on each of these things separately or together, depending on how much time we have. But as we go along, we'll always check to make sure everything works right and does what we want it to do.

ROLE ASSIGNMENT

1. Contact Management:

Siddharth Tewari PES2UG21CS525

2. Interaction Tracking:

Sushmitha T PES2UG21CS560

3. Sales and Opportunity Management:

Swathi PES2UG21CS564

4. Analytics and Reporting:

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