

UNIVERSITY OF PETROLEUM & ENERGY STUDIES, DEHRADUN UTTARAKHAND

**PROJECT TITLE**

**Cloud-Based CRM**

**PROJECT SYNOPSIS**

Sales and Lead Management CRM

**BACHELOR OF TECHNOLOGY**

Computer Science with Specialization in Cloud Computing and Virtualization Technology

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**Introduction**

CRM (CUSTOMER RELATIONSHIP MANAGEMENT) is a widely used system for managing corporate communications with customers, customers and prospects It uses technology to organize, automate and manage business planning and sales activities, but are also used for marketing, customer service and technical support that can be used because these systems do not require a physical facility or environment. ﻿A Sales and Lead Management CRM (Customer Relationship Management) machine is a effective device designed to assist agencies successfully arrange, automate, and streamline their sales processes while coping with interactions with capacity and current clients. It serves as a centralized platform for taking pictures leads, tracking their journey thru the income pipeline, and nurturing them with centered conversation and follow-ups. By integrating features which include lead scoring, venture control, and comprehensive reporting, a Sales and Lead Management CRM allows income teams to prioritize efforts, improve performance, and in the end decorate consumer relationships. This technology-driven method not best boosts sales overall performance however additionally affords treasured insights for strategic choice-making, making it vital for modern businesses aiming to optimize their income operations and force boom.

**Literature Survey**

**CRM System Optimization in Sales and Marketing:**

Customer relationship management (CRM) covers the area of relationships with customers, from continuous creation to upkeeping and developing relationships. (Bergström & Leppänen 2021, 418). In recent years B-to-B and B-to-C companies have increasingly utilized CRM systems to manage customer relationships more efficiently. The usage of cloud-based CRM system solutions in Finnish companies increased from 12% in 2014 to 31% in 2021 (Statistics Finland 2022). As the systems are applied more widely, the opportunities that the systems bring are becoming an increasingly relevant area of study.1

The role of social CRM and its potential impact on lead generation in business-to-business marketing

The implementation of social media technology into a firm’s marketing strategy has been a significant discussion for many sales organisations. Currently, only a fraction of business-to-business (B2B) organisations are using social media (e.g., Linked-In and Twitter), for reaching potential consumers. Thus, these media tools are underutilised in the sales and marketing process or often non-existent. With the evolution of the internet and Web 2.0, adding a social media strategy, also known as social CRM, to a company’s marketing initiatives may provide a competitive advantage to firms who are able to cultivate the benefits.2

**Methodology/Planning of work**

1. Initiation Phase

* Define Project Objectives: Clearly state the goals and objectives of the CRM project (e.g., improve lead conversion rates, streamline sales processes).
* Project Planning: Create a project plan outlining timelines, milestones, resources, and budget allocations.

2. Requirements Gathering

* Document Requirements: Document both functional requirements (e.g., lead capture, pipeline management) and non-functional requirements (e.g., scalability, security).

3. CRM Platform Selection

* Research CRM Solutions: Evaluate various CRM platforms (e.g., Salesforce, HubSpot, Zoho CRM) based on your requirements and budget.

4. Design and Architecture

* Technology Stack: Decide on technologies and frameworks (e.g., React.js for frontend, Node.js for backend, MySQL for database) based on project requirements and team expertise.

5. Development

* Implement Core Features: Develop core features including lead capture forms, pipeline management, reporting functionalities, and integration with external systems.

6. Testing and Quality Assurance

* Test Plan Creation: Develop a comprehensive test plan covering all aspects of the CRM including functionality, performance, security, and usability.

7. Deployment

* Deployment Plan: Create a deployment plan detailing the steps and timeline for deploying the CRM system into production.
* Deploy CRM: Deploy the CRM system on a chosen environment (cloud-based or on-premises) ensuring compatibility and scalability.

**Facilities required for proposed work**

1. Software Requirements

* Version Control System: Git for source code management, along with platforms like GitHub, GitLab, or Bitbucket.
* Frameworks/Libraries: React.js, Angular, or Vue.js for building the user interface.
* HTML/CSS: For structuring and styling the web pages.
* JavaScript/TypeScript: For client-side scripting and enhancing interactivity.
* Programming Languages: Node.js, Java, or PHP for server-side development.
* Database Systems: MySQL, PostgreSQL, MongoDB, or Microsoft SQL Server for storing and managing data.
* Cloud Platforms: AWS(Amazon Web services)
* Storage Services: Amazon S3
* Collaboration Tools: Slack,

2) Hardware Requirements

* Workstations/Laptops: High-performance computers, multi-core processors, and SSD storage to ensure smooth development and testing.
* Operating Systems: Compatible with major development tools (Windows, macOS, or Linux).
* Networking: High-Speed Internet: Reliable and high-speed internet connectivity for seamless collaboration, code deployment, and cloud access.

**References**

[1] Hassinen, V., 2022. CRM System Optimization in Sales and Marketing.

[2] Lindevall, M., 2017. The Implementation of a Cloud-Based CRM in a Small Enterprise.