

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1. Introduction

1.1 Overview

Implementing a CRM (Customer Relationship Management) system for result tracking of a candidate with internal marks would involve creating a database that contains the necessary information about each candidate and their internal marks. The CRM system would need to have the capability to track each candidate's progress through the different stages of the result tracking process, such as the initial entry of internal marks, verification of those marks, and finalization of the result.

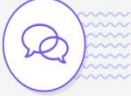
1.2 Purpose

- By using a CRM system, all the data related to a candidate's performance can be stored in a centralized database. This can include their internal marks, attendance, assignments, and other relevant information. This makes it easier for the faculty and staff to access the data and track the progress of the candidate.
- A CRM system can help to create personalized communication with the candidates. This can include automated messages, reminders, and notifications related to their academic performance. It can also be used to send congratulatory messages or encouragement to candidates who are performing well.
- A CRM system can also improve collaboration between different departments or teams involved in the candidate's academic progress. For example, the faculty, academic advisors, and administrative staff can all access the same data and communicate with each other to provide the best support to the candidate.
- A CRM system can generate reports and analytics related to a candidate's performance. This can include graphs and charts that display the candidate's progress over time, their performance in different subjects, and their overall academic performance. These reports can be useful for faculty and staff in making decisions related to the candidate's academic progress.

2. Problem Definition & Design Thinking

2.1 Empathy Map


Template



Retrospective

Use this framework to reflect on recent work. This simple structure is useful both alone and in groups.

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1

Reflect on the topic

Working silently and individually, have each person create a few sticky notes in all four quadrants below for about five minutes. With the remaining time, discuss notes in each quadrant.

What went well?

What should we keep doing?

What should we celebrate?

Where did we make progress?

Clearly define the problem you are trying to solve

Automated result tracking using a CRF can save time

Once the data has been prepared and features have been extracted

Use the collected and preprocessed data to train the CRF model

CRF models can be combined with other models or techniques to improve their performance

Determine the problem you want to solve with the CRF

What went poorly?

Where did we have problems?

What was frustrating to us or others?

What held us back?

What ideas do you have?

What ideas do you have for future work together?

Where do you see opportunities to improve?

What has untapped potential?

How should we take action?

What do you believe we should do next?

What specific things should we change?

What should extend beyond this meeting?

TOPIC

Workstation engineering team Sprint 10

There are many different types of CRFs, each with their own strengths and weakness

Train the CRF model using the prepared data

If the features are poorly designed or inadequate, the model's performance may suffer

Train the CRF model using the labeled data and the defined features

You will need to represent your data in a way that can be fed into a CRF model


Identify the features will be used to predict the outcome

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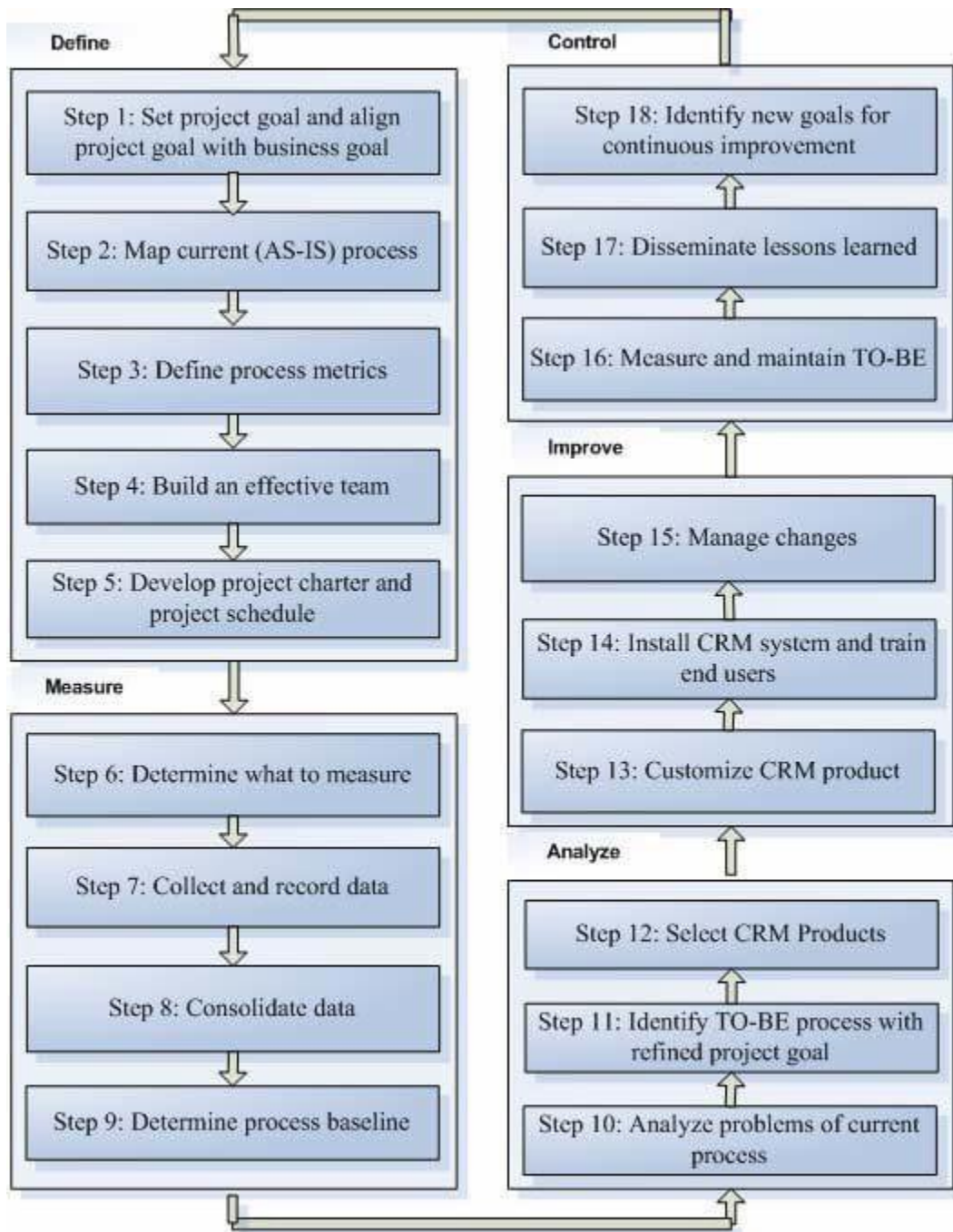


Need some inspiration?

See a finished version of this template to assist your work.

[Open example](#)

2.2 Ideation & Brainstrom Map



3. Result

3.1 Data Model

Object Name	Fields in the Object	
Internal Results	Field label	Data type
	Candidate Id	Text
	Course Id	Text
	Internal Results Name	Text
	Marks	Number
Lecturer Details	Field label	Data type
	Course	Lookup
	Course Id	Text
	Lecturer Details Name	Text
	Lecturer Name	Text
	Lecturer Role	Text
Semester	Field label	Data type
	Semester	Text
	Semester	Lookup
	Semester Name	Text
Candidate	Field label	Data type
	Candidate	Lookup
	Candidate Name	Text
	Candidate Id	Text
	Semester Name	Text
Course Details	Field label	Data type
	Course Details	Text
	Course Details Name	Text

3.2 Activity & Screenshot

➤ Home Page of Salesforce Account

The screenshot shows the Salesforce Setup Home page. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Profiles, and Feature Settings. The main content area displays a table of recent items, including Course Details, Candidate Id, and Internal Results. The table has columns for NAME, TYPE, and OBJECT. The bottom of the page shows the Windows taskbar with various application icons and system information.

NAME	TYPE	OBJECT
Course Details	Custom Field Definition	Course Details
Course Details	Custom Object Definition	
Candidate Id	Custom Field Definition	Internal Results
Internal Results	Custom Object Definition	
Marks	Custom Field Definition	Internal Results
Course Id	Custom Field Definition	Internal Results
Candidate Id	Custom Field Definition	Candidate
Candidate	Custom Object Definition	
Candidate	Custom Field Definition	Candidate
Semester Name	Custom Field Definition	

➤ Custom Objects

- Course details

The screenshot shows the Salesforce Object Manager page for the 'Course Details' object. The left sidebar contains a navigation menu with options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays the details of the object, including its API Name, Custom status, and various settings like Enable Reports and Track Activities. The bottom of the page shows the Windows taskbar with various application icons and system information.

Details
Description
API Name Course_Details__c
Custom ✓
Singular Label Course Details
Plural Label Course Details
Enable Reports ✓
Track Activities
Track Field History
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

- **Lecturer Details**

The screenshot shows the Salesforce Setup interface for the 'Lecturer Details' object. The browser tabs include 'Lecturer Details | Salesforce', 'Radhika | Salesforce', and '- Student'. The URL is 'rdmmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040sPB/Details/view'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Lecturer Details' and includes a 'Details' section with fields for API Name, Singular Label, Plural Label, and various system settings like 'Enable Reports' and 'Deployment Status'. The 'API Name' is 'Lecturer_Details__c', 'Singular Label' is 'Lecturer Details', and 'Plural Label' is 'Lecturer Details'. The 'Deployment Status' is 'Deployed'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 20:14 on 13-04-2023.

- **Semester**

The screenshot shows the Salesforce Setup interface for the 'Semester' object. The browser tabs include 'Semester | Salesforce', 'Radhika | Salesforce', and '- Student'. The URL is 'rdmmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000409sK/Details/view'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Semester' and includes a 'Details' section with fields for API Name, Singular Label, Plural Label, and various system settings like 'Enable Reports' and 'Deployment Status'. The 'API Name' is 'Semester__c', 'Singular Label' is 'Semester', and 'Plural Label' is 'Semesters'. The 'Deployment Status' is 'Deployed'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 20:14 on 13-04-2023.

- Candidate

The screenshot shows the Salesforce Setup interface for the 'Candidate' object. The browser tabs include 'Candidate | Salesforce', 'Radhika | Salesforce', and '- Student'. The URL is 'rdmmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040sP1/Details/view'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Candidate' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Candidate__c
Custom	✓
Singular Label	Candidate
Plural Label	Candidates
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are visible in the top right. An 'Activate Windows' watermark is present in the bottom right corner.

- Internal Details

The screenshot shows the Salesforce Setup interface for the 'Internal Results' object. The browser tabs include 'Internal Results | Salesforce', 'Radhika | Salesforce', and '- Student'. The URL is 'rdmmaths-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040sPG/Details/view'. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Internal Results' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Internal_Results__c
Custom	✓
Singular Label	Internal Results
Plural Label	Internal Results
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are visible in the top right. An 'Activate Windows' watermark is present in the bottom right corner.

➤ Users

The screenshot shows the Salesforce 'Users' management page. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions is a table listing existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains six rows of user data. At the bottom of the page, there is an 'Activate Windows' watermark.

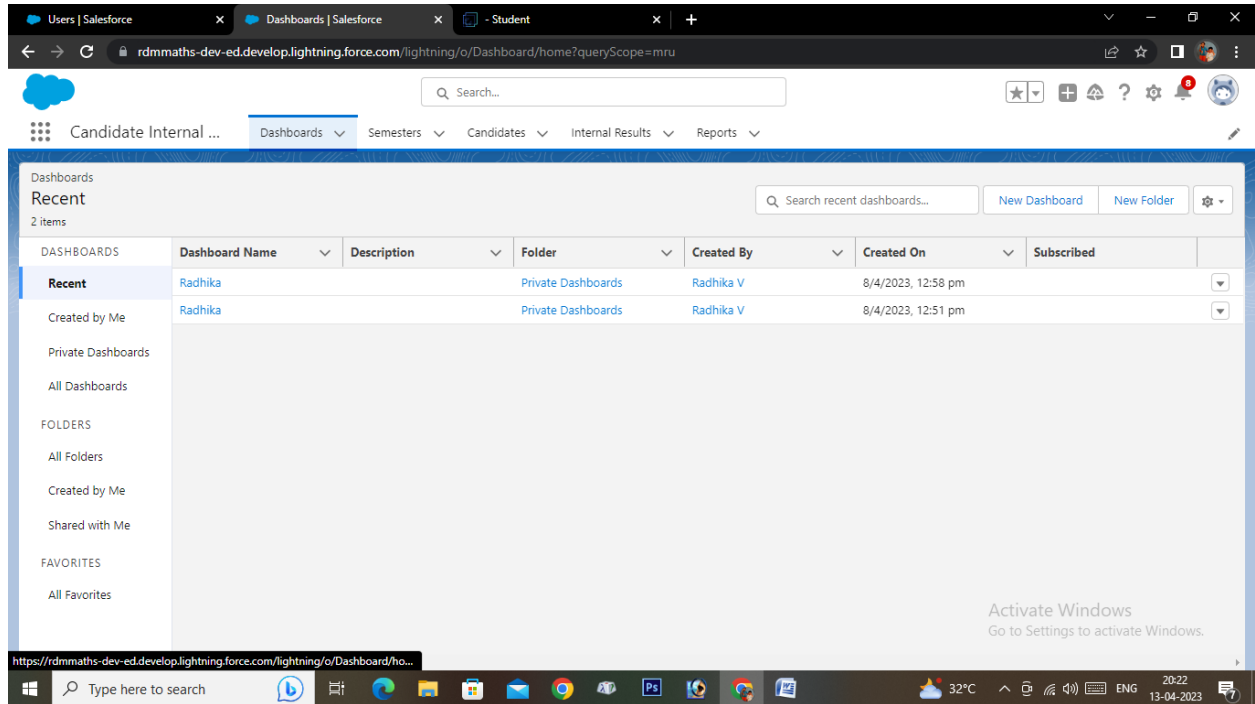
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000ronvhear.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2w00000ronvhear.mdd9ey4dsocv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000ronvhear.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	V_Radhika	BV	radhika@radm.maths		✓	System Administrator
<input type="checkbox"/> Edit	V_Radhika	rv	radhika17122003@gmail.com		✓	Custom Sales Profile
<input type="checkbox"/> Edit	V_Radhika	rv	ihon@martain.com		✓	Force.com - App Subscription User
<input type="checkbox"/> Edit	V_Radhika	rv	john@martain.com		✓	Standard Platform User

➤ Reports

The screenshot shows the Salesforce 'Reports' page. The left sidebar contains navigation links for Candidate Internal..., Dashboards, Semesters, Candidates, Internal Results, and Reports. The main content area is titled 'Recent' and includes a search bar and buttons for 'New Report' and 'New Folder'. Below the search bar is a table listing recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains two rows of report data. At the bottom of the page, there is an 'Activate Windows' watermark.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Candidates with Candidate Report		Private Reports	Radhika V	13/4/2023, 7:43 pm	
Created by Me	New Accounts Report		Private Reports	Radhika V	8/4/2023, 12:57 pm	

➤ Dashboard



4. Trailhead Profile Public URL

- **Team Leader** - <https://trailblazer.me/id/trailradhika1712>
- **Team Member 1** - <https://trailblazer.me/id/ajitt5>
- **Team Member 2** - <https://trailblazer.me/id/vpechimuthu>
- **Team Member 3** - <https://trailblazer.me/id/skumar9247>

5. Advantages & Disadvantages

Advantages	Disadvantages
A CRM system can help automate the result tracking process, saving time and reducing the potential for errors.	Implementing a CRM system can be costly, especially for small organizations with limited resources.
A CRM system can provide a centralized database for all candidate information, including internal marks, allowing for easy access and analysis of data.	Storing sensitive candidate information in a CRM system requires robust security measures to prevent unauthorized access.
CRM systems can generate customizable reports, which can provide valuable insights into candidate performance, allowing for informed decision-making.	Implementing and maintaining a CRM system requires technical expertise and ongoing support, which can be challenging for some organizations.

6. Applications

- Educational institutions can use a CRM to track the performance of their students, manage their academic records, and communicate with them regarding their progress.
- Recruitment agencies can use a CRM to track the progress of job candidates, manage their resumes, and communicate with them regarding their interviews and job offers.
- HR departments can use a CRM to track the performance of their employees, manage their employment records, and communicate with them regarding their career development.
- Sales and marketing departments can use a CRM to track the performance of their leads and customers, manage their sales and marketing activities, and communicate with them regarding their needs and preferences.

7. Conclusion

Implementing a CRM (Customer Relationship Management) system for tracking candidate results with internal marks solution can provide numerous benefits for educational institutions, recruitment agencies, HR departments, sales and marketing teams, and other industries that require managing relationships with people.

By using a CRM, organizations can track and analyze candidate performance, manage their records, communicate with them regarding their progress, and improve their overall experience. With the help of a CRM, organizations can also streamline their processes, increase efficiency, and make data-driven decisions.

In conclusion, implementing a CRM system for result tracking of a candidate with internal marks can be a valuable investment for any organization that wants to enhance its candidate management processes and improve its relationships with stakeholders.

8. Feature Scope

- Educational institutions can use a CRM to track the performance of their students, manage their academic records, and communicate with them regarding their progress.
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