

## 1 INTRODUCTION

### 1.1 Overview

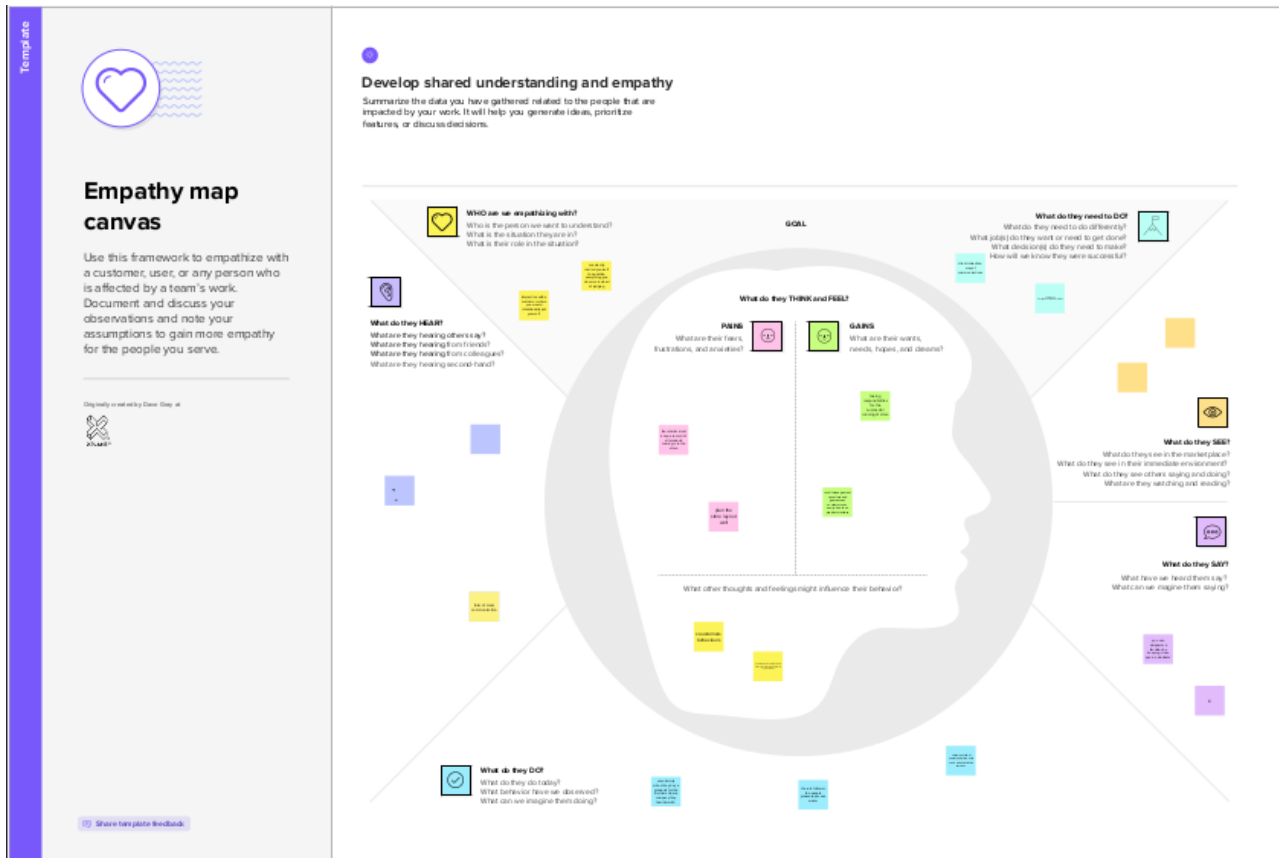
Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

### 1.2 Purpose

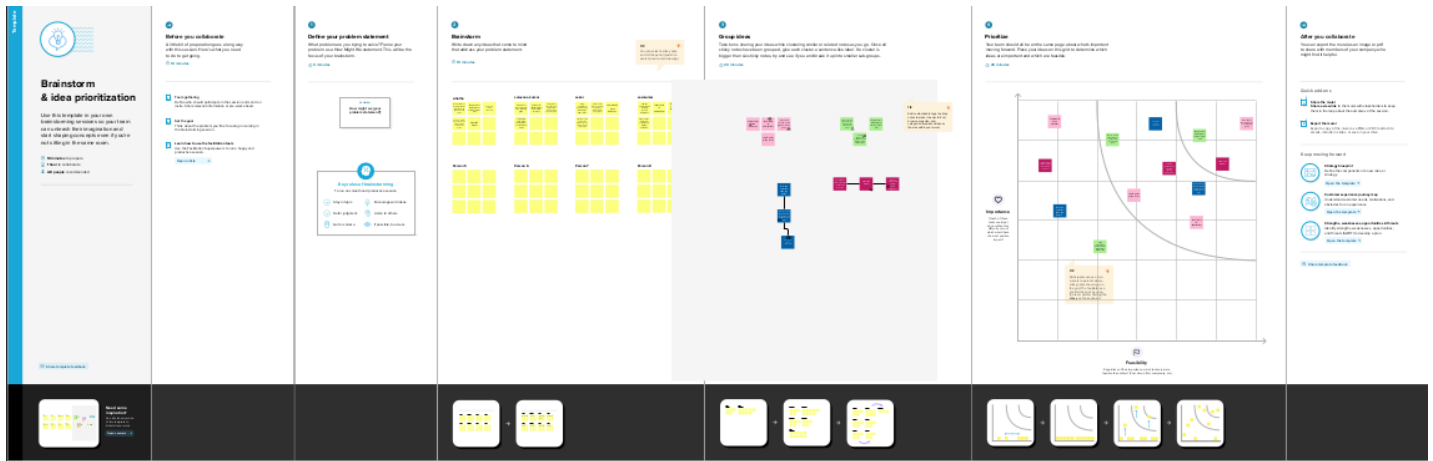
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map Canvas



## 2.2 Brainstorming & Idea Prioritization 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 |
|             |                      |                 |

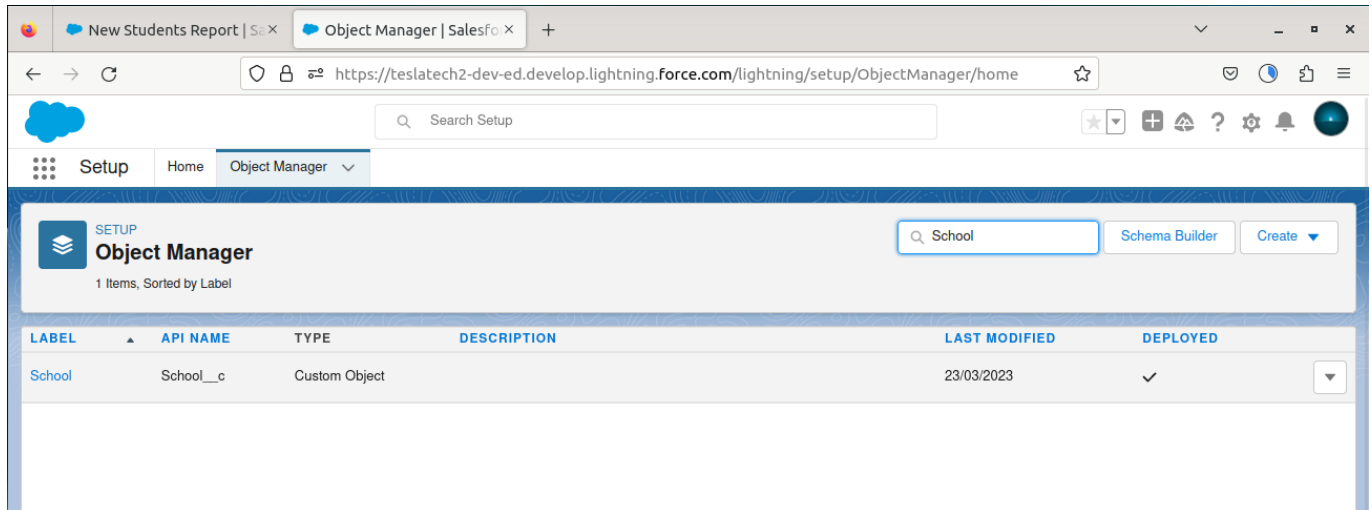
|                |                    |                            |
|----------------|--------------------|----------------------------|
| <b>Student</b> | <b>Field label</b> | <b>Data type</b>           |
|                | Phone Number       | Phone                      |
|                | School             | Master-Detail Relationship |
|                | Result             | Picklist                   |
|                | Class              | Number                     |
| <b>Parent</b>  | <b>Field label</b> | <b>Data type</b>           |
|                | Parent Address     | Text Area                  |
|                | Parent Number      | Phone                      |

### 3.2 Activity & Screenshot

(Milestone-2:OBJECT)

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

# Creation of Object for School Management



Object Manager

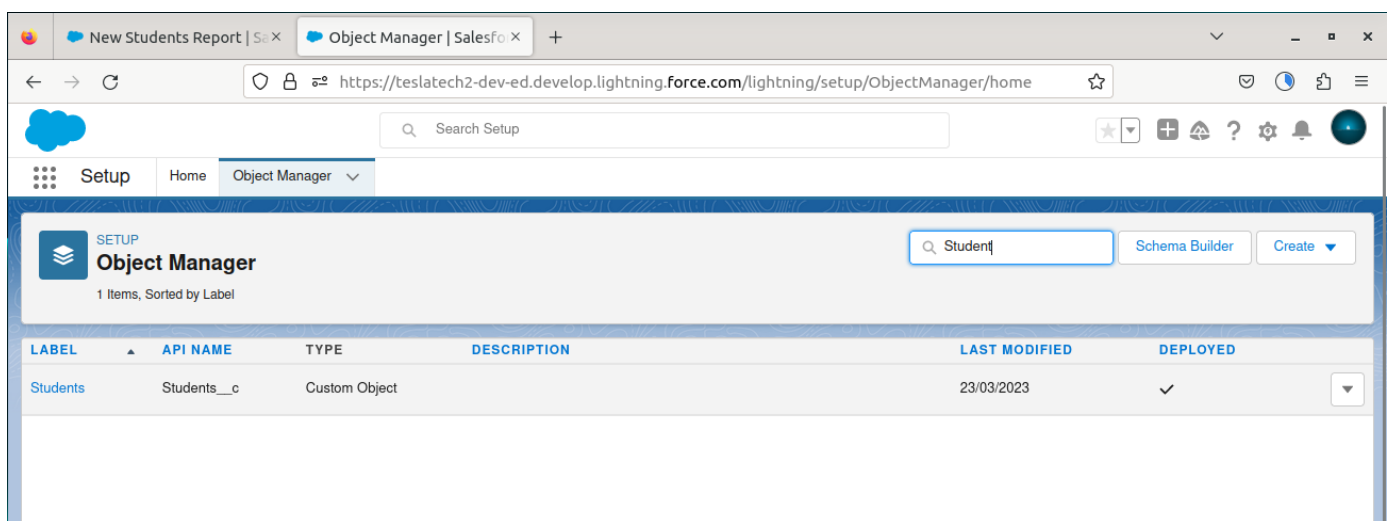
1 Items, Sorted by Label

| LABEL  | API NAME  | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|--------|-----------|---------------|-------------|---------------|----------|
| School | School__c | Custom Object |             | 23/03/2023    | ✓        |

( Milestone-2:OBJECT )

## Activity-2 : Create Student Object

# Creation of Student Object



Object Manager

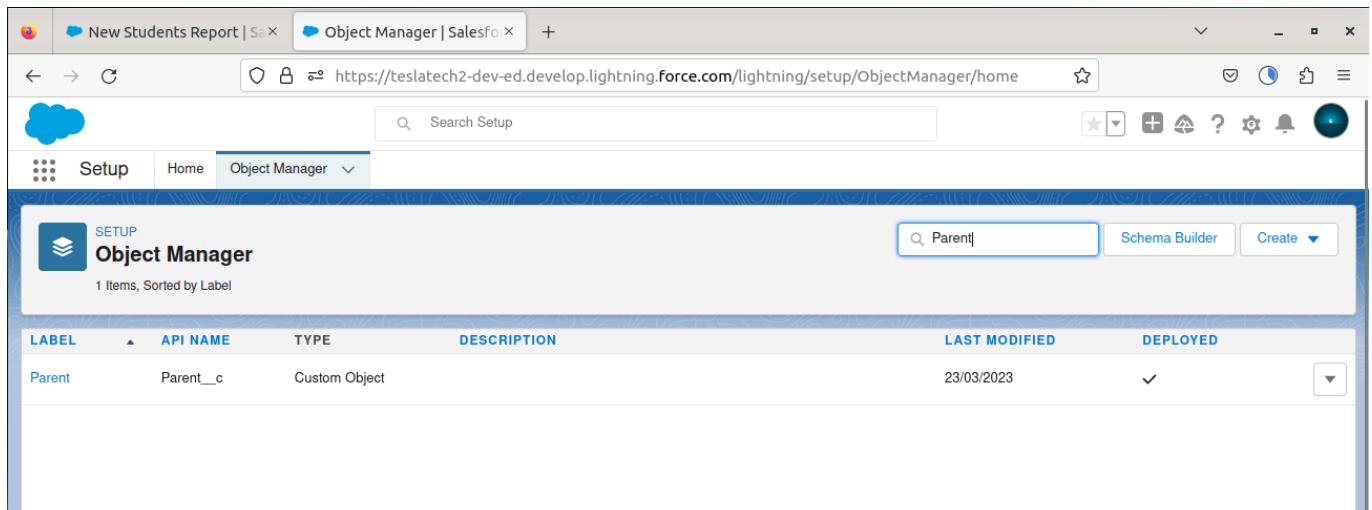
1 Items, Sorted by Label

| LABEL    | API NAME    | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------|-------------|---------------|-------------|---------------|----------|
| Students | Students__c | Custom Object |             | 23/03/2023    | ✓        |

## ( Milestone-2: OBJECT )

### Activity-2 : Create Parent Object

#### # Creation of Parent Object



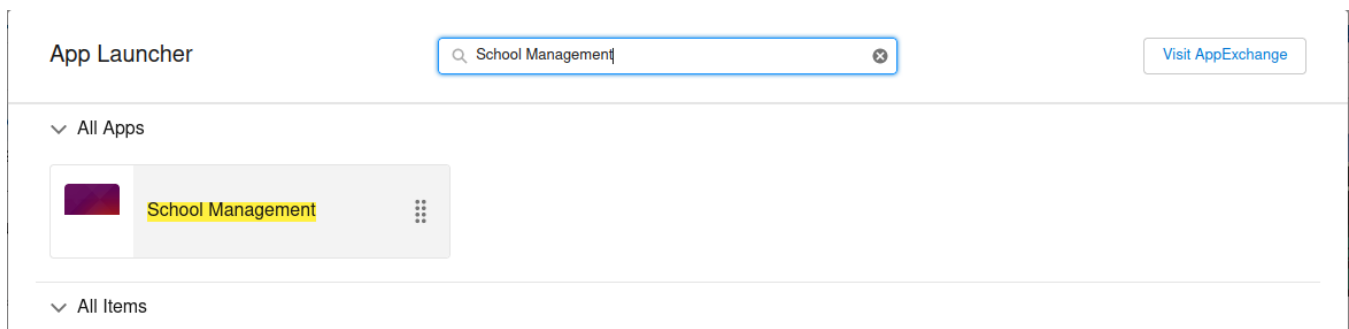
The screenshot shows the Salesforce Object Manager interface in a web browser. The browser tabs include "New Students Report | Se" and "Object Manager | Salesfo". The address bar shows the URL: <https://teslatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>. The page header includes a search bar with "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" with a sub-header "1 Items, Sorted by Label". A search bar contains "Parent". To the right are buttons for "Schema Builder" and "Create". Below this is a table with the following data:

| LABEL  | API NAME  | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|--------|-----------|---------------|-------------|---------------|----------|
| Parent | Parent__c | Custom Object |             | 23/03/2023    | ✓        |

## ( Milestone-3: LIGHTNING APP )

### Activity-1 : Create the School Management App

#### # Creation School Management App

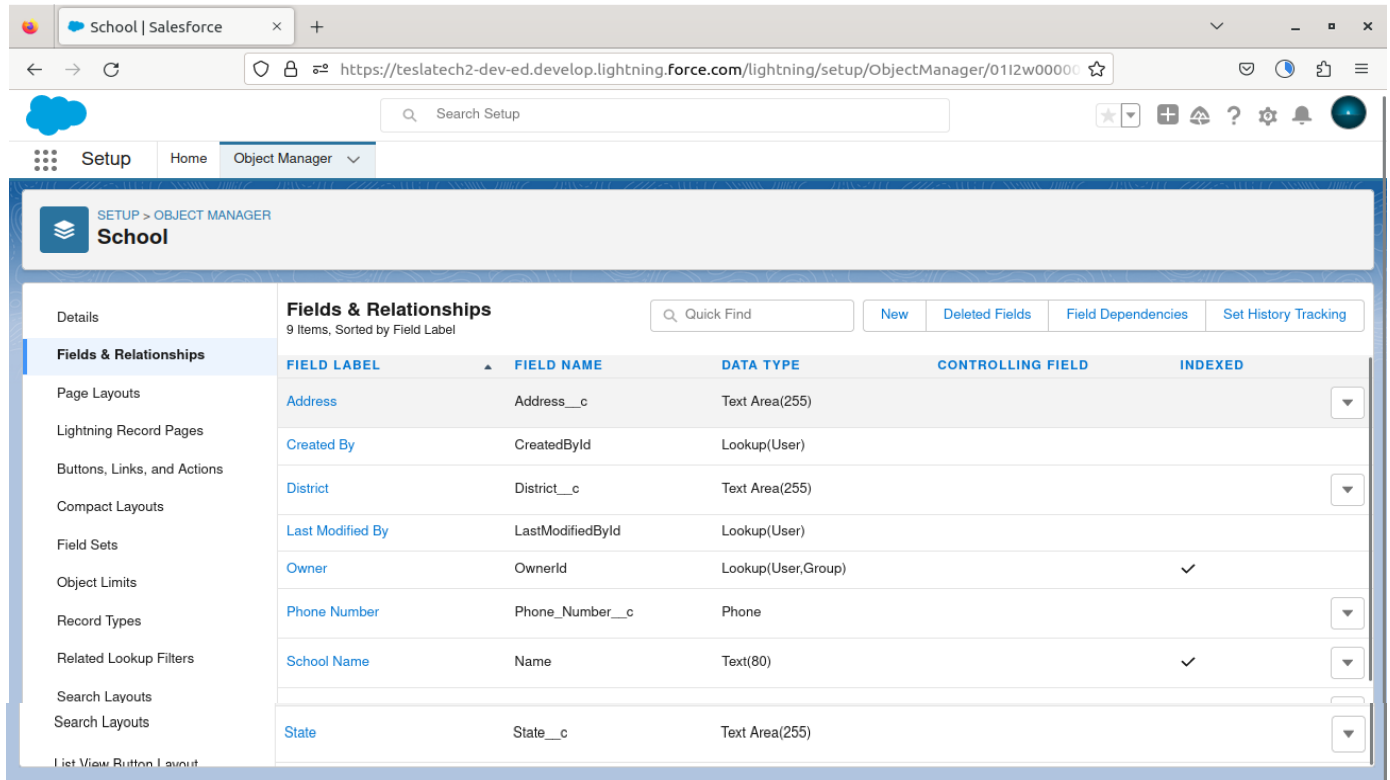


The screenshot shows the Salesforce App Launcher interface. At the top, there is a search bar with "School Management" and a "Visit AppExchange" button. Below the search bar, there is a section titled "All Apps" which contains a card for "School Management" with a purple icon and a yellow highlight. Below this, there is a section titled "All Items".

## ( Milestone-4: FIELDS & RELATIONSHIP )

### Activity-1 : Creation of fields for the School Objects

#### # Creation of fields for the School Object



The screenshot shows the Salesforce Setup interface for the 'School' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

| 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 : Creation of fields for the Student Objects

#### # Creation of fields for the Student Object

Students | Salesforce

https://teslatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Students**

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| 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)           |                   | ✓       |

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

## ( Milestone-4: FIELDS & RELATIONSHIP )

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

#### # Creation of fields for the Parents Object

Parent | Salesforce

https://teslatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Parent**

Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

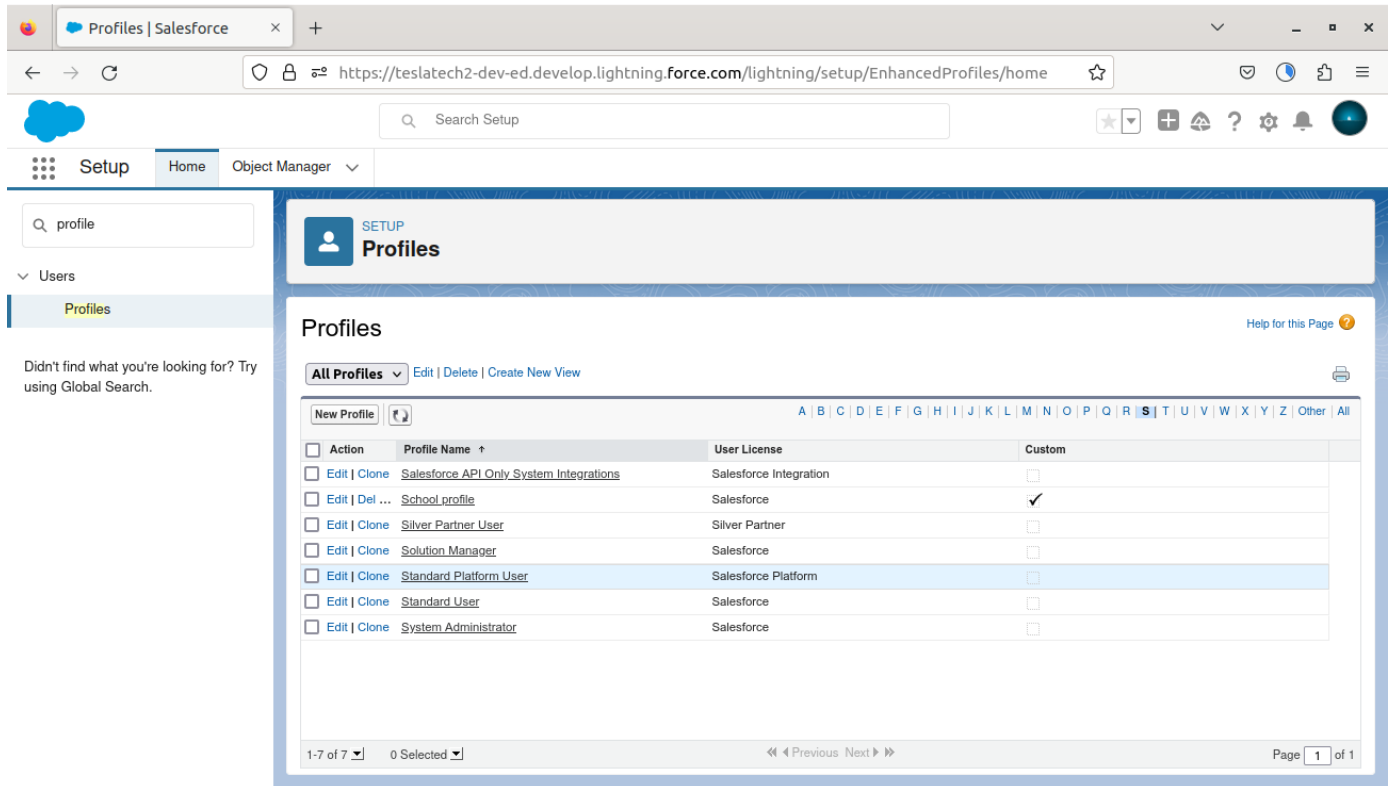
| FIELD LABEL      | FIELD NAME        | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|-------------------|--------------------|-------------------|---------|
| Created By       | CreatedById       | Lookup(User)       |                   |         |
| Last Modified By | LastModifiedById  | Lookup(User)       |                   |         |
| Owner            | OwnerId           | Lookup(User,Group) |                   | ✓       |
| Parent Address   | Parent_Address__c | Text Area(255)     |                   |         |
| Parent Name      | Name              | Text(80)           |                   | ✓       |
| Parent Number    | Parent_Number__c  | Phone              |                   |         |

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

## ( Milestone-5: PROFILE )

### Activity-1 : Creation on Profile

#### # Creation on Profiles



The screenshot shows the Salesforce Setup interface for Profiles. 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 'New Profile' button and a list of existing profiles. The profiles are listed in a table with columns for Action, Profile Name, User License, and Custom. The 'Standard Platform User' profile is highlighted.

| 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 : Creating a Users

#### # Creating a Users



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar and a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'All Users' and includes instructions on how to create, view, and manage users. It also provides links for downloading the Salesforce mobile app. A table lists several users with columns for Action, Full Name, Alias, Username, Role, Active status, 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'.

## ( Milestone-7: PERMISSION SETS )

### Activity-1 : Permission sets 1:

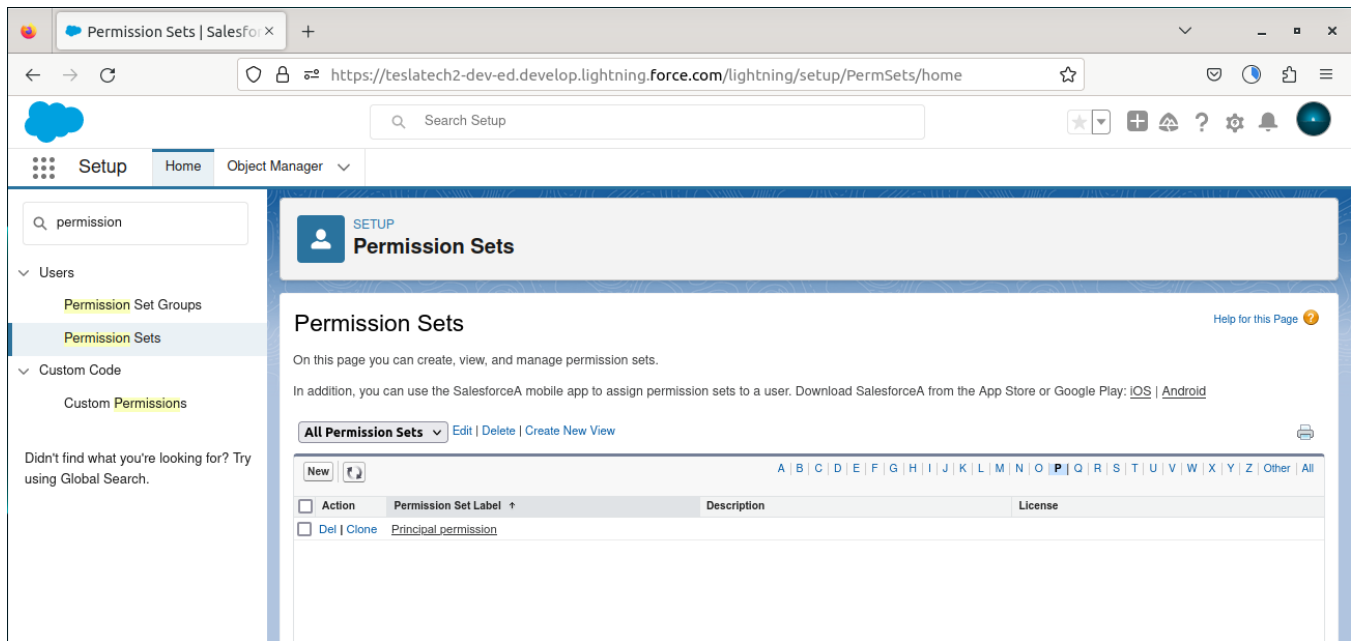
### # To Set Permissions

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar and a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes instructions on how to create, view, and manage permission sets. It also provides links for downloading the Salesforce mobile app. A table lists several permission sets with columns for Action, Permission Set Label, Description, and License. The table includes a permission set named 'Teacher permission'. At the bottom of the table are buttons for 'New', 'Clone', and 'Delete'.

## ( Milestone-7: PERMISSION SETS )

### Activity-2 : Permission sets 2:

#### # To Set Permissions



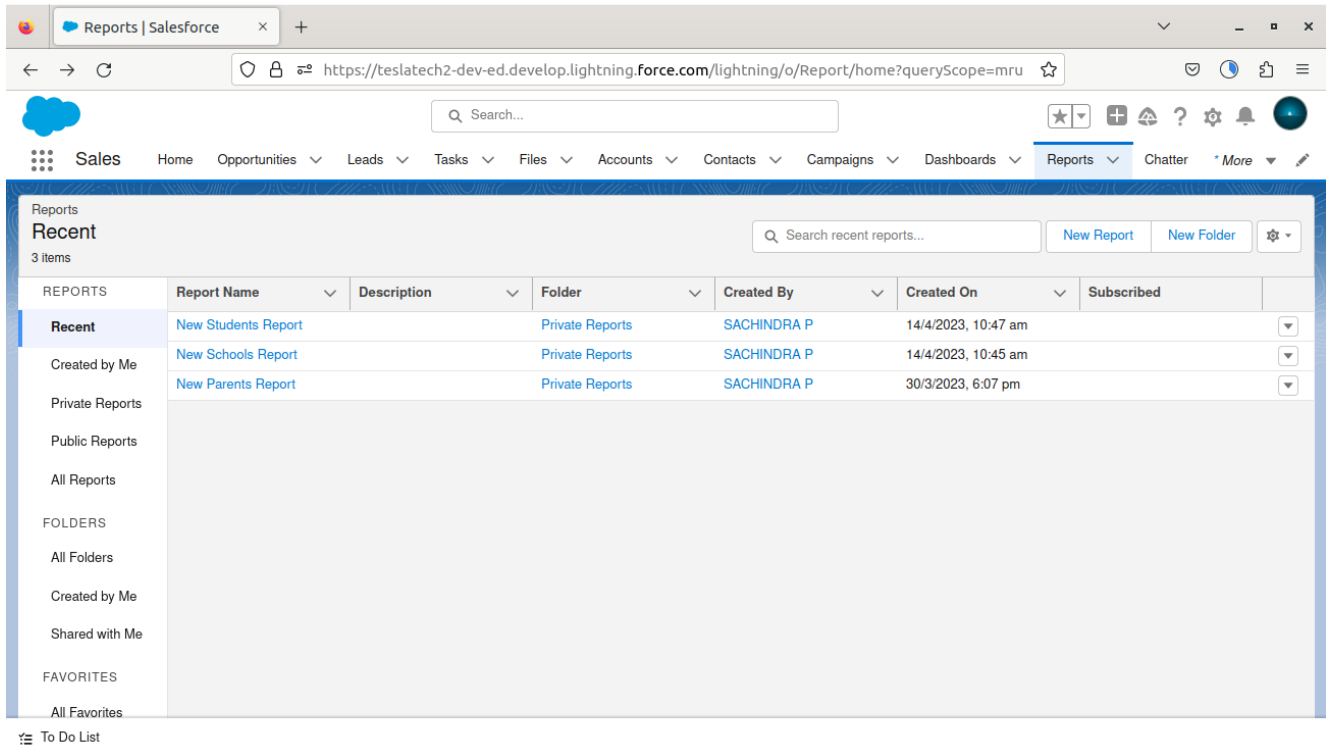
The screenshot shows the Salesforce Setup page for Permission Sets. The browser address bar displays the URL: <https://testlatech2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home>. The left sidebar contains a search bar with "permission" and a navigation menu with "Users", "Permission Set Groups", "Permission Sets", "Custom Code", and "Custom Permissions". The main content area is titled "Permission Sets" and includes a "Help for this Page" link. Below the title, there is a description of the page and a link to download the SalesforceA mobile app. A table titled "All Permission Sets" is displayed, showing a list of permission sets. The table has columns for "Action", "Permission Set Label", "Description", and "License". The first row shows a permission set labeled "Principal permission" with a "Del" button and a "Clone" button.

| Action                                      | Permission Set Label | Description | License |
|---|----------------------|-------------|---------|
| <a href="#">Del</a>   <a href="#">Clone</a> | Principal permission |             |         |

## ( Milestone-8: REPORTS )

### Activity-1 : Reports

#### # Reports



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', and 'More'. The 'Reports' section is active, showing a 'Recent' list of 3 items. A search bar for recent reports is present. The table below lists the 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/sekar003>

Team Member 1 - <https://trailblazer.me/id/skumar9222>

Team Member 2 - <https://trailblazer.me/id/skumar9218>

Team Member 3 - <https://trailblazer.me/id/srilm7>

**[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 analytic 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 mitigation, 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.

( 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.

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 down their ability to create marketing strategies, provide customers flawless service, and peruse 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.

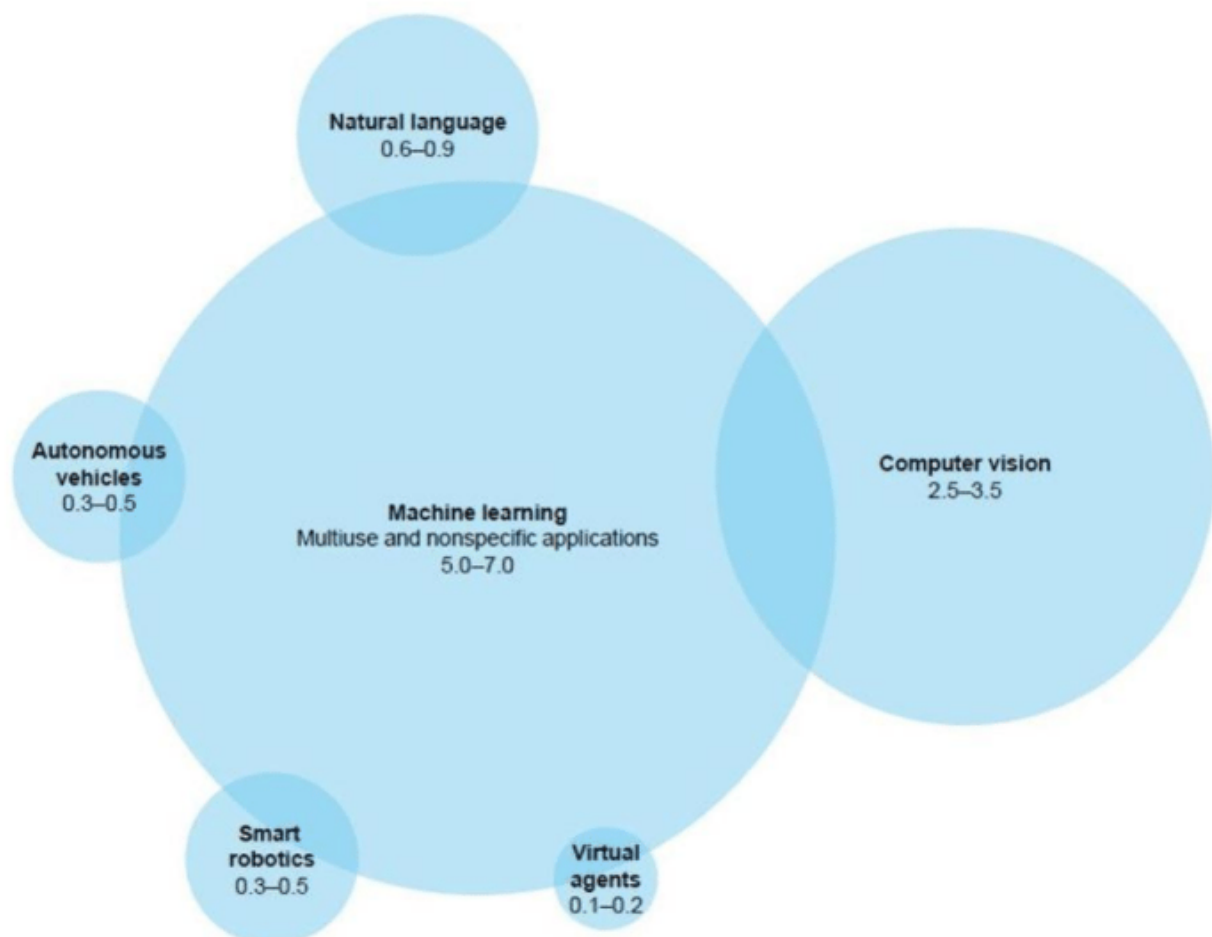
Artificial intelligence and business intelligence capabilities are built in CRM that accelerate administrative tasks and provide actionable insights. Customer relationship management's advantages and disadvantages will help you understand it in detail.

(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.”

**Machine learning received the most investment, although boundaries between technologies are not clear-cut**

External investment in AI-focused companies by technology category, 2016<sup>1</sup>  
\$ billion



<sup>1</sup> Estimates consist of annual VC investment in AI-focused companies, PE investment in AI-related companies, and M&A by corporations. Includes only disclosed data available in databases, and assumes that all registered deals were completed within the year of transaction.

SOURCE: Capital IQ; Pitchbook; Dealogic; McKinsey Global Institute analysis