

PROJECT REPORT TEMPLATE

INTRODUCTION:

1.1 Overview:

A CRM system helps you keep our customer's contact details up to date, track every interaction they have with our business, and manage their accounts. It's designed to help you improve your customer relationship, and in turn, customer lifetime value.

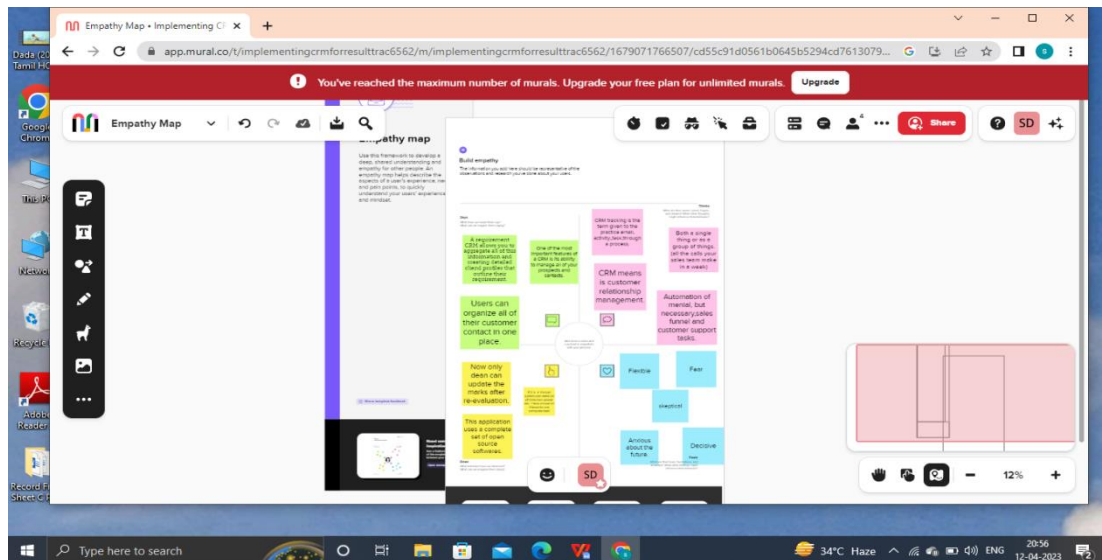
Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationship and assist in customer retention and drive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

1.2 Purpose:

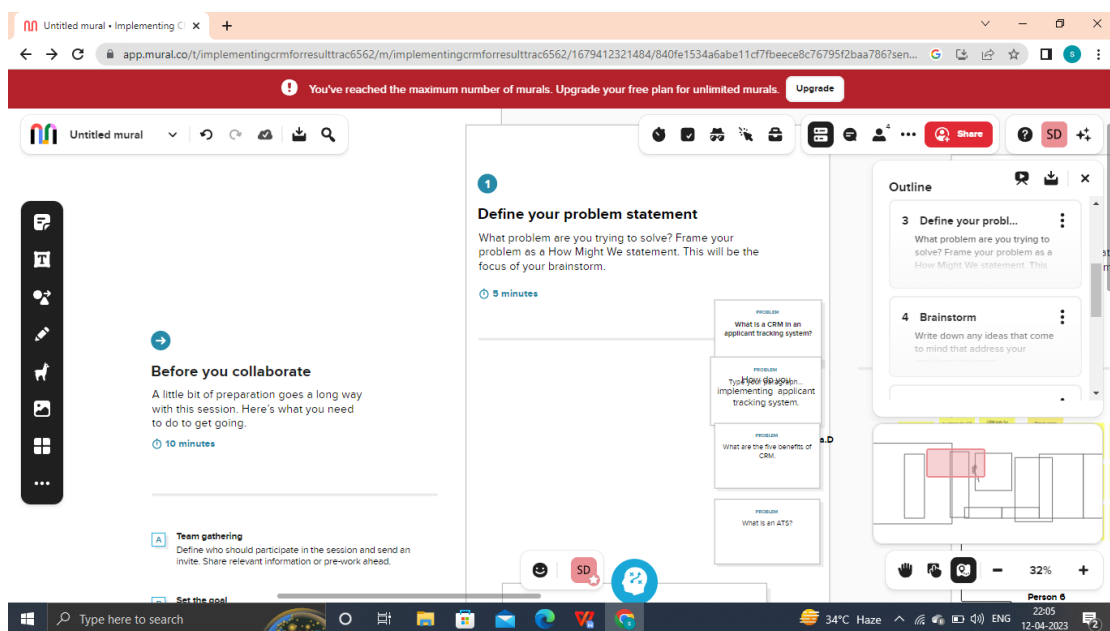
CRM solution helps you find new customers, win their business, and keep them happy by organizing customer and prospect information in a way that helps you build stronger relationships with them and grow your business faster.

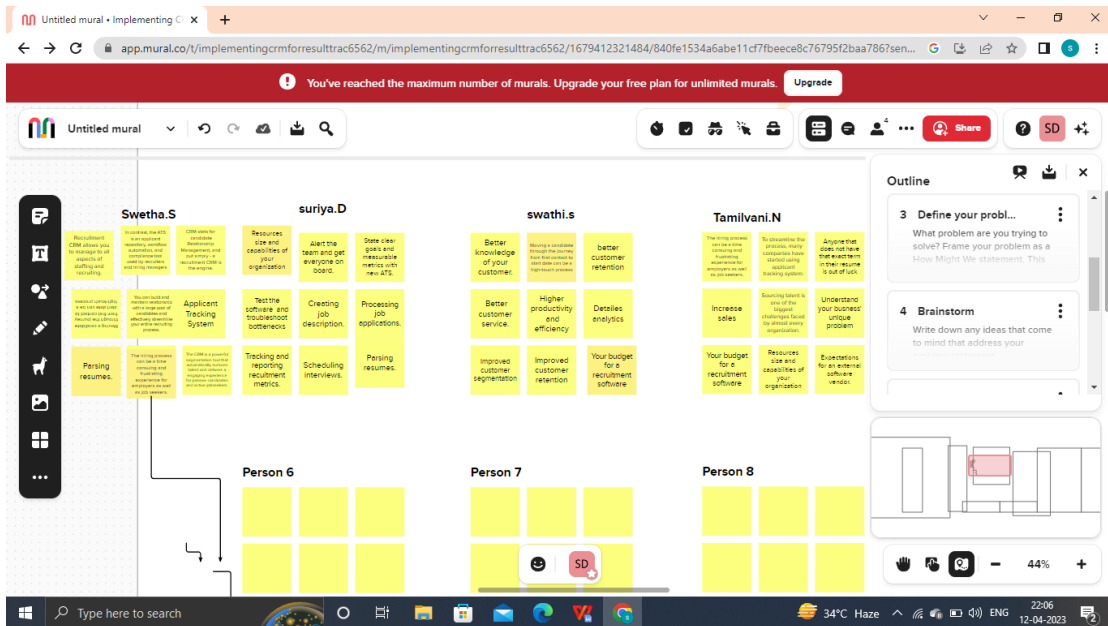
2. Problem Definition and Design Thinking:

2.1 Empathy Map



2.2 Ideation and Brainstorming map Screenshot:





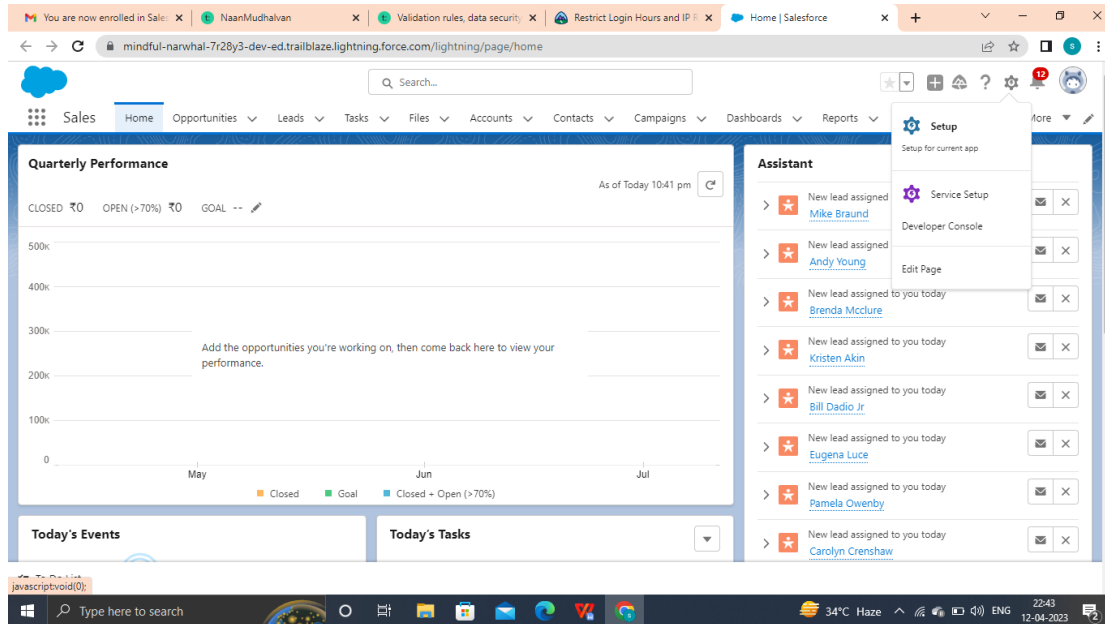
3. Result:

3.1 Data Model:

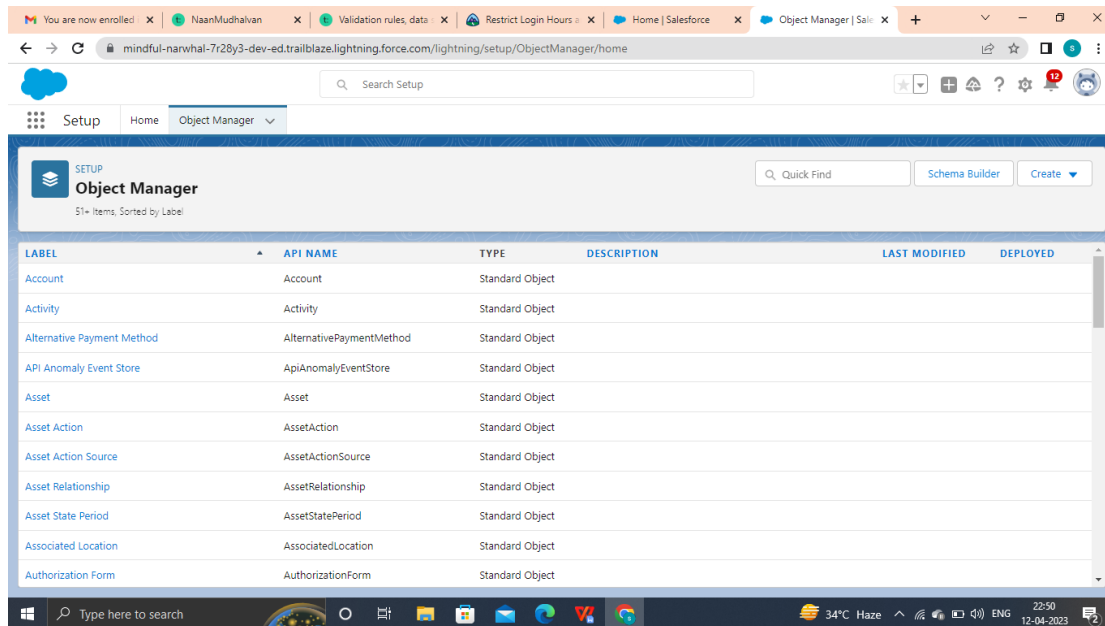
Object Name	Fields in the Object
Object-1	Field Lable:Semester name Data Type:Text

3.2 Activity and Screenshot

To Create an Object



The screenshot shows the Salesforce Home dashboard. The top navigation bar includes links to Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. The main content area features a 'Quarterly Performance' chart showing 'CLOSED' and 'OPEN (>70%)' metrics. Below the chart are sections for 'Today's Events' and 'Today's Tasks'. On the right, an 'Assistant' panel lists recent lead assignments to various users. A 'Setup' menu is open, showing options like 'Setup for current app', 'Service Setup', 'Developer Console', and 'Edit Page'.



The screenshot shows the Salesforce Object Manager setup page. The top navigation bar includes links to Setup, Home, and Object Manager. The main content area displays a table of objects, including Account, Activity, Alternative Payment Method, API Anomaly Event Store, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Associated Location, and Authorization Form. The table columns are LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A 'Quick Find' search bar and a 'Schema Builder' button are visible at the top right of the table.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Authorization Form	AuthorizationForm	Standard Object			

Field and Relationship

You are now enri...NaanMudhalvanValidation rulesRestrict Login Ho...Home | Salesforc...Home | Salesforc...Account | Salesfo...mindful-nanwhal-7r28y3-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGERAccount

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Fields & Relationships

34+ Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active_c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		✓

Type here to search

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Lightning App

Create the Candidate Internal

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with options like Setup, Home, and Object Manager. The main content area is titled 'Lightning Experience App Manager' and features a 'Clone Apps(Beta)' section. Below this, there is a table listing various apps, including 'All Tabs', 'Analytics Studio', 'Ant Migration Tool', 'App Launcher', and 'Bolt Solutions'. The table columns include App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'Enable App Cloning' toggle is currently disabled.

Lightning Experience App Manager

Clone Apps(Beta)

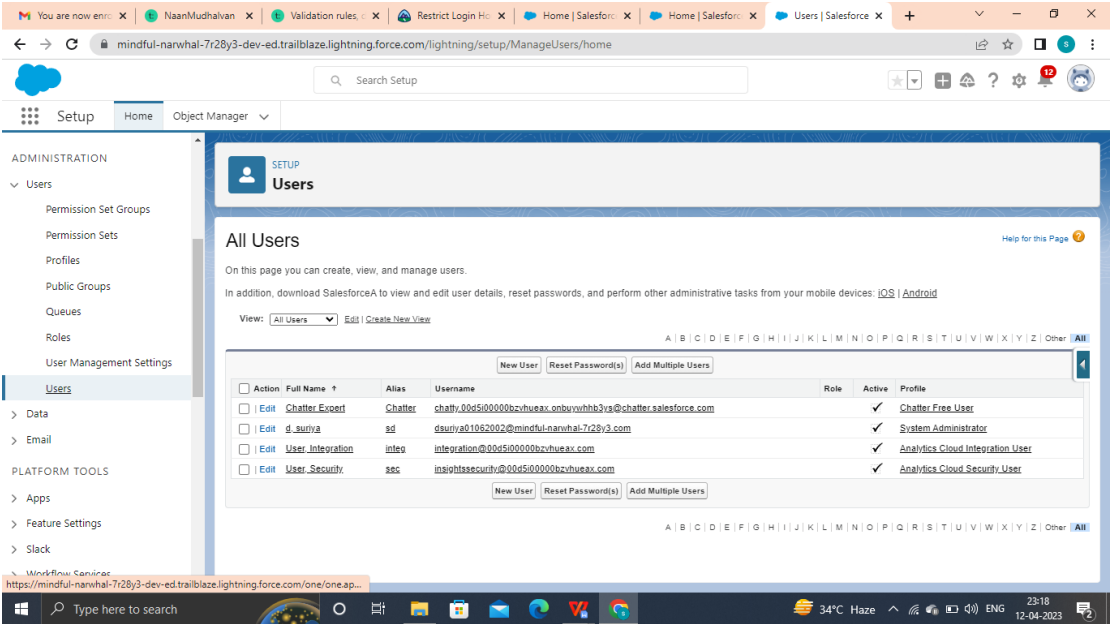
Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

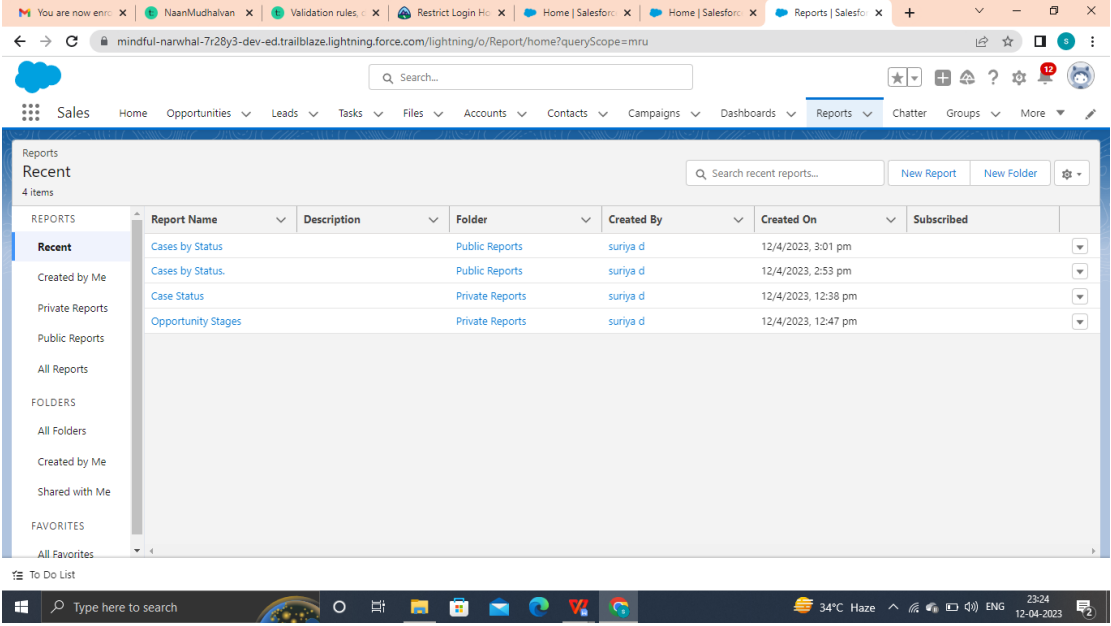
App Name	Developer Name	Description	Last Modified	App Type	Vi...
1 All Tabs	AllTabSet		12/04/2023, 7:51 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	12/04/2023, 7:51 am	Classic	✓
3 Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based ...	12/04/2023, 7:51 am	Connected (Managed)	
4 App Launcher	AppLauncher	App Launcher tabs	12/04/2023, 7:51 am	Classic	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed ...	12/04/2023, 7:51 am	Lightning	✓

Users

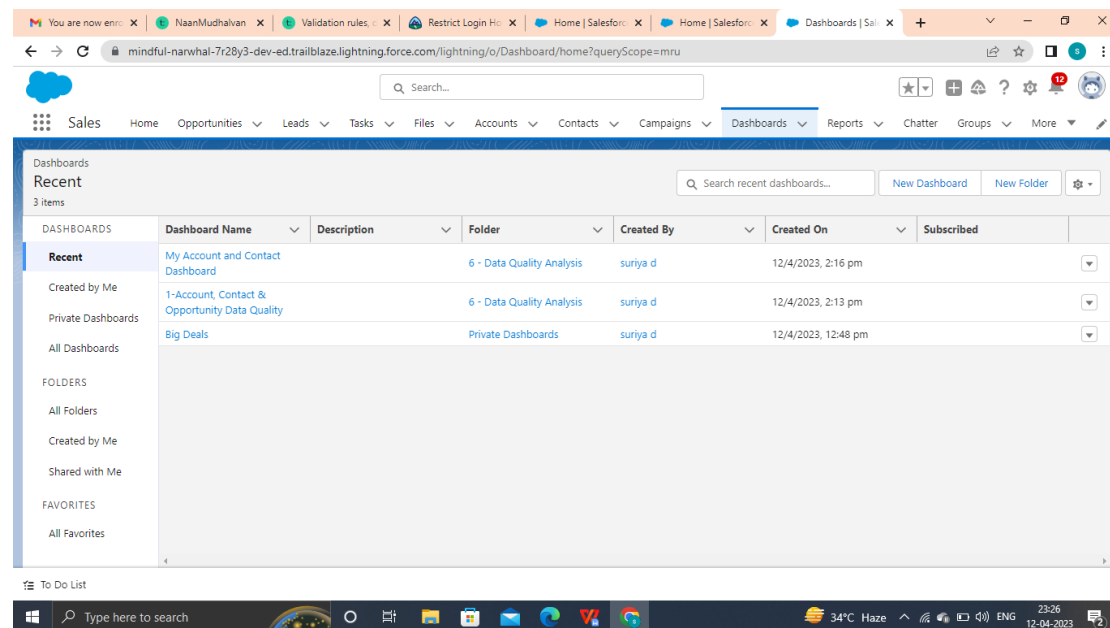
Creating a Users



Reports



Dashboard



4. Trailhead Profile Public URL

Team Leader- <https://trailblazer.me/id/surid1>

Team Member 1- <https://trailblazer.me/id/ssekar66>

Team Member 2- <https://trailblazer.me/id/sswetha64>

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

5. Advantages & Disadvantages

Every business is planned, established, and run on based of its customers. Customers are like the blood of every business, without which business organs can't function. Happy customer reflects the quality and growth of any business. With the evolution of technology, the business also adopts digital platform and start interacting with customers.

Technology has helped the business to reach its customers within a second. But more than interaction is needed in the long run, a business must maintain the satisfaction and happiness of its customers and it comes by solving their problems. This can be done by creating a relationship with the customers, a deep necessity for the business.

To do this, **CRM** came into existence where CRM stands for Customers Relationship management which is a vast concept to understand. CRM is an integral part of any business's success that helps businesses to build strong customer relationships and by the quality of conversation with prospects and customers. It also helps a business to do its market

ing, increase its sales and make a high rate of profit.

In the digital world, "Customer relationship management is a software that makes business to nurture its relationship with customers by communicating them that give customer a better experience and realize them that business concerned about their needs."

- An IT software tool that allows a business or individual full control over customer relationship
- Customers are explored
- Help in making sales and marketing strategies
- Create flexible solutions for customers support and analysis
- A force accelerator for diverse industries such as small businesses, mid-size businesses, and large multinational organizations
- Examples of CRM are Operational CRM, Sales CRM, Inbound CRM, and all-in-one CRM.
- Some CRM providers are Hub Spot CRM, Salesforce, Oho, etc.

Application:

Contract life cycle management (CRM) automates and streamlines contract processes during key stages. These states include initiation, authoring ,process and workflow, negotiation and approval,execution, ongoing management and compliance and contract renewal.

CRM is a software system that helps business owners easily track all communication and nurture relationship with their leads and clients. A CRM replaces the multitude of spreadsheets,databases and apps that many businesses patch together to track client data.

Conclusion

CRM is a sound business strategy to identify the bank's most profitable customers and prospects,and devotes time and attention to expending account relationship with those customers through individualized marketing,reprising,discretionary decision making,and customized service through the vicariousness channels that the bank uses.

CRM is developing into a major element of corporate strategy for many organization. A greater focus on CRM is the only way the banking industry can protect its market share and boost growth. With intensifying Competition,declining market share, deregulation's, smarter and more demanding customers,there is competition between the banks to attain a competition advantage over one another or for sustaining the survival competition.

Future Scope:

Customer service operators need to handle calls, emails and social/web enquire quickly and to the satisfaction of the customer; but also keeping to service KPIS such as response times, resolution percentages and SLA adherence.

