

# **IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS**

## **1. INTRODUCTION:**

### **1.1 Overview:**

Customer Relationship Management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyses customer interactions and data throughout the customer lifecycle.

The goal is to improve customer service relationships and assists in customer retention and drive sales growth.

For achieving better results in CRM implementation, there needs to be careful planning, resource allocation, and management system put in place. Companies must include critical people from Marketing, Customer service, sales & support teams in the core implementation team while planning the CRM implementation.

### **1.2 Purpose:**

CRM benefits include a centralized communication channel, increased customer retention, detailed insights & analytics, a better customer support system, and much more.

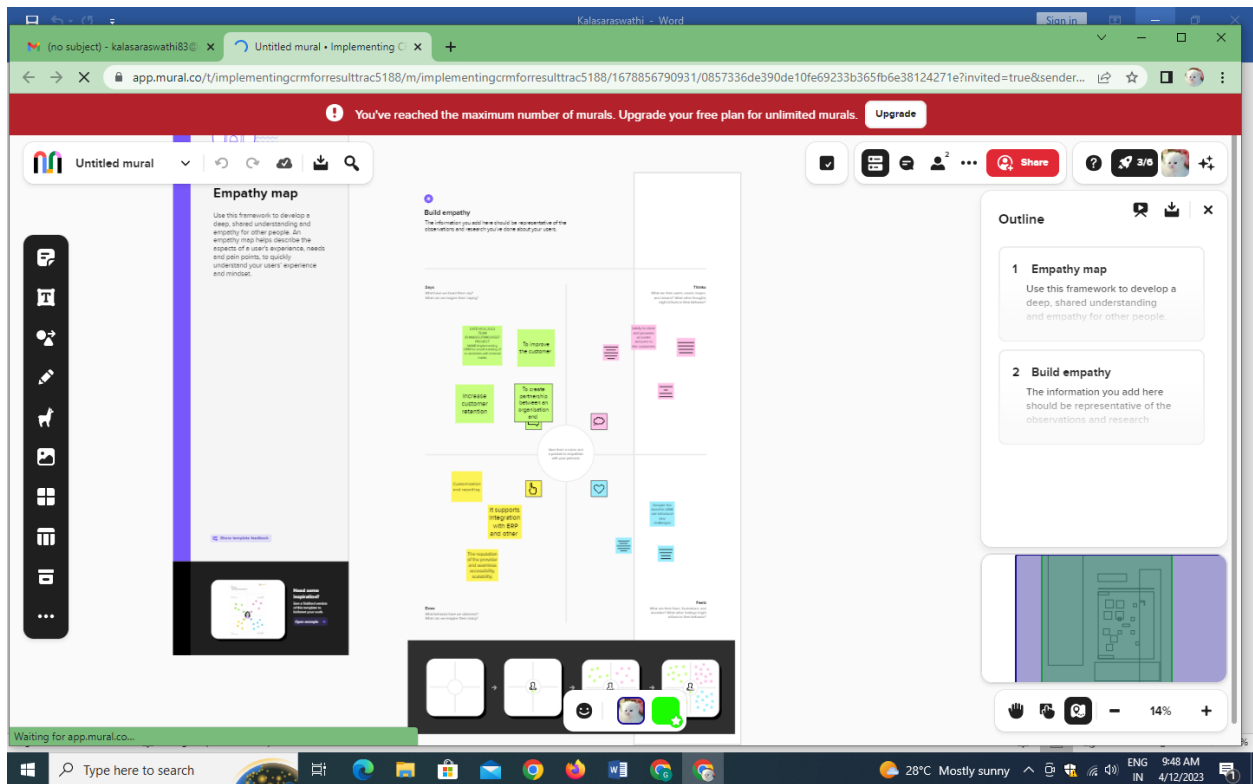
Companies invest thousands of dollars in CRM, but to ensure its effective utilization, they need to have an effective implementation plan in place.

The ultimate goal is to improve communication and interaction with real and interaction with real customers and leads, and to maximize their impact on the production process and business figures.

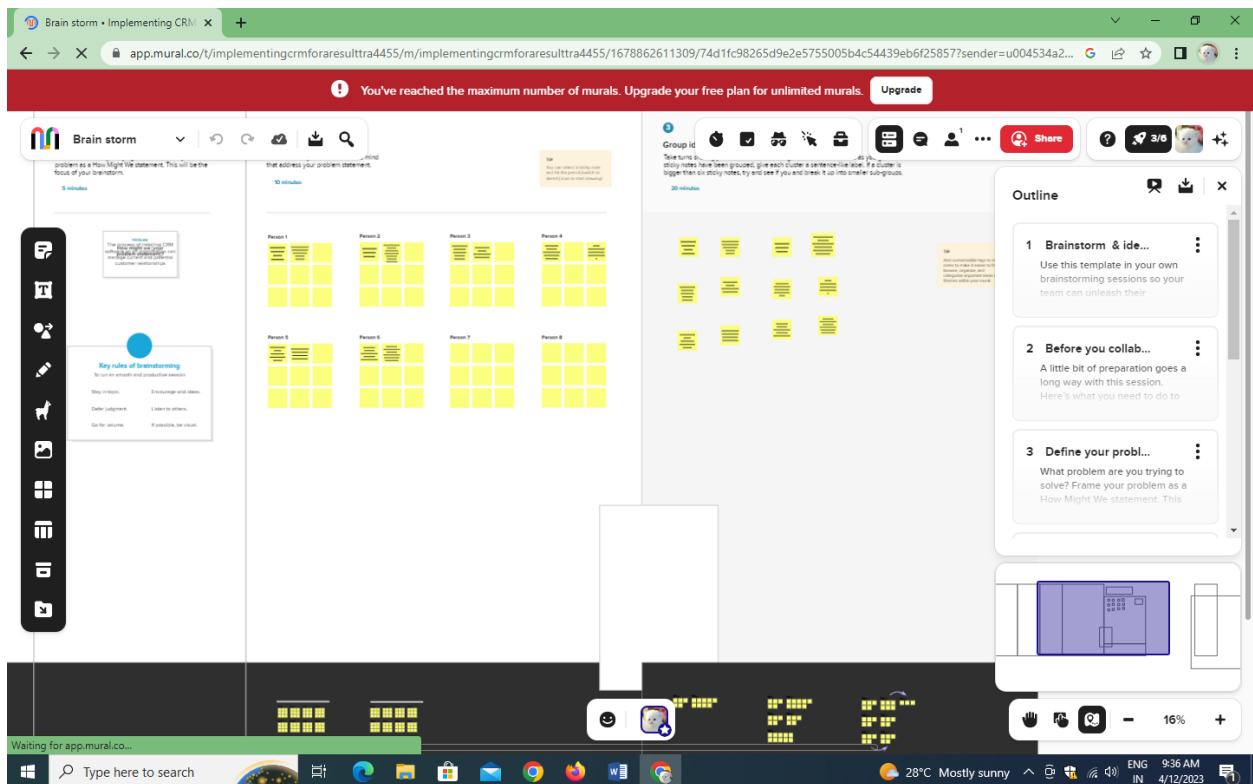
To plan outreach, analyses performance, and manage customer interactions, and streamline billing and customer support processes.

## **2. Problem Definition and Design Thinking:**

### **2.1 Empathy Map**



## 2.2 Ideation and Brainstorming Map



### 3 RESULT:

#### 3.1 Data Model:

Object Name	Fields in the object	
Obj1	Field label	Data type
	Semester	text
	Semesters	text
Obj2	Field label	Data type
	Candidate	text
	Candidates	text
Obj3	Field label	Data type
	Course details	Text
	Course details	text
Obj4	Field label	Data type
	Lecturer details	Text
	Lecturer details	Text
Obj5	Field label	Data type
	Internal results	Text
	Internal results	text

### 3.2 Activity 1

Semester:

The screenshot shows the Salesforce Setup interface for the 'Semester' object manager. The browser address bar indicates the URL: `thirukolanjiappar-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000001gpII/Details/view`. A notification pop-up from the browser asks to allow or block notifications from the domain. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, 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, Restriction Rules, Scoping Rules, and Triggers. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is empty. The 'API Name' is 'Semester\_\_c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Semester' and the 'Plural Label' is 'Semesters'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' are set to 'Standard salesforce.com Help Window'. A 'Stay ahead of incidents' notification is displayed in the bottom right corner, encouraging users to use the free Customer Service Incident Management solution from Service Cloud. The Windows taskbar at the bottom shows the search bar, taskbar icons, and system tray information including the date and time (10:02 AM, 4/12/2023).

thirukolanjiappar-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000001gpII/Details/view

Search Setup

Setup

SEMESTER OBJECT MANAGER

**Semester**

Details

Edit Delete

Description

API Name  
Semester\_\_c

Custom  
✓

Singular Label  
Semester

Plural Label  
Semesters

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

**Stay ahead of incidents**

Help your teams proactively respond to large-scale disruptions with the free Customer Service Incident Management solution from Service Cloud.

Dismiss Get Started

Candidate:

candidate | Salesforce

thirukolanjiappar-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000001gpn0/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

candidate

Details

Fields & Relationships

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

Restriction Rules

Scoping Rules

Triggers

Details

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

Edit Delete

https://thirukolanjiappar-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000001gpn0/Details/view

Type here to search

28°C Mostly sunny

ENG IN 10:03 AM 4/12/2023

## Course details:

course details | Salesforce

thirukolanjiappar-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000043sHa/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

course details

Details

Fields & Relationships

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

Restriction Rules

Scoping Rules

Triggers

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

Edit Delete

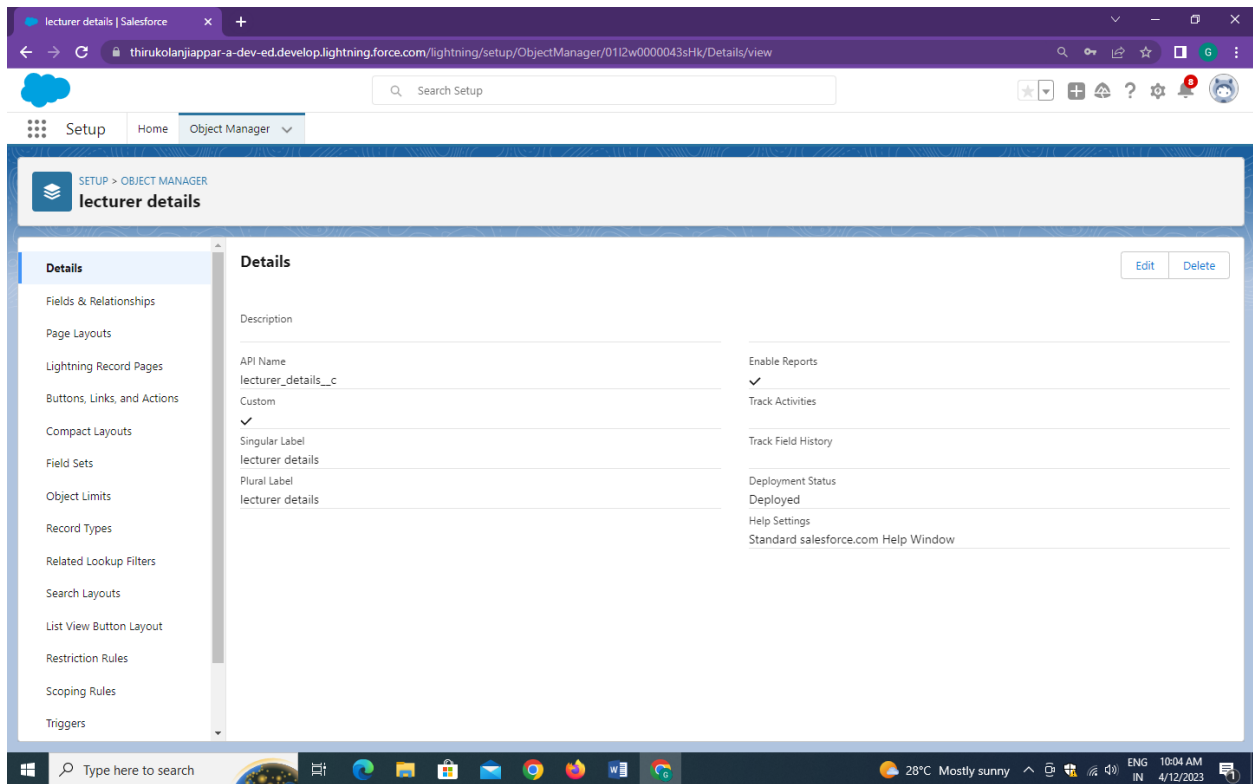
https://thirukolanjiappar-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000043sHa/Details/view

Type here to search

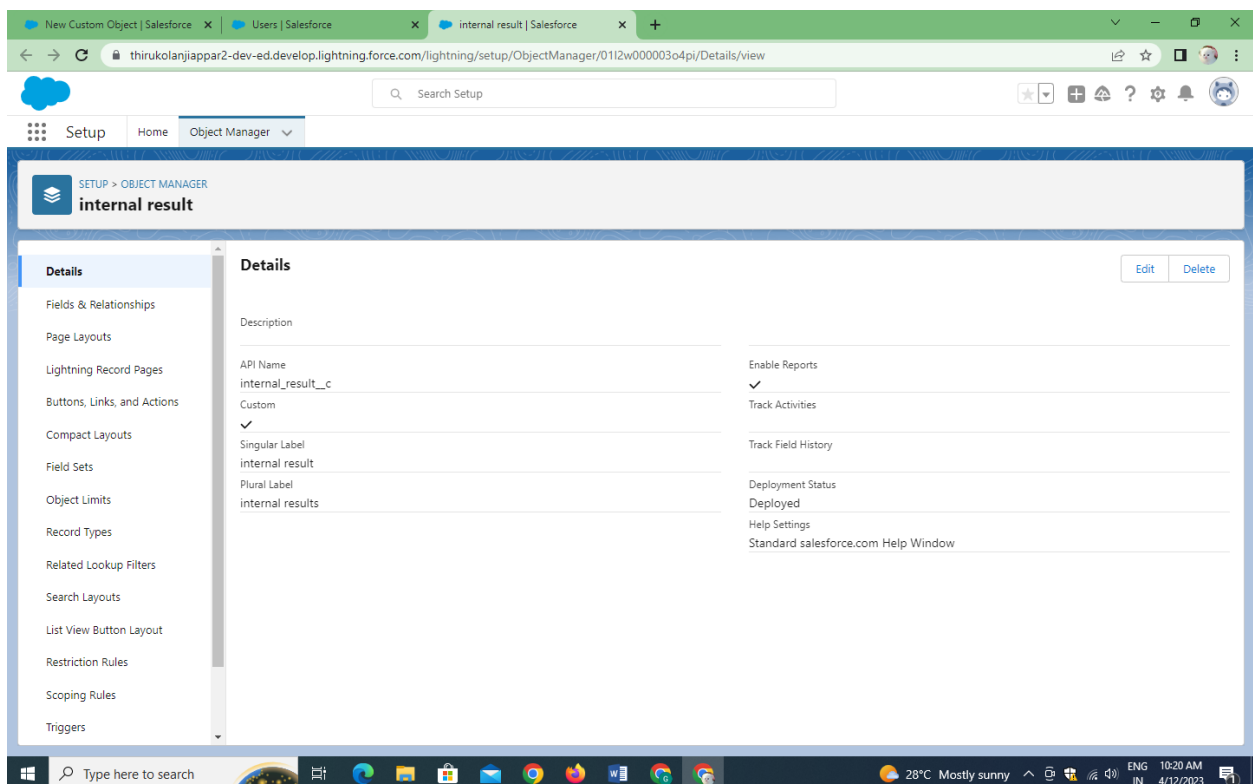
28°C Mostly sunny

ENG IN 10:04 AM 4/12/2023

## Lecturer details:



Internal results:



## Activity 1

### User:

The screenshot shows the Salesforce Setup interface for a user named Ms Kalasaraswathi. The browser address bar indicates the URL: `thiurkolanjappar2-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000FbHqBAAV%3FnoRedirect%3D1%26isUserEntityOverride%3D1...`. A notification bubble from the browser states: "...d.develop.lightning.force.com wants to Show notifications" with "Allow" and "Block" buttons.

The left sidebar contains the following navigation menu:

- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION
  - Users
    - Permission Set Groups
    - Permission Sets
    - Profiles
    - Public Groups
    - Queues
    - Roles
    - User Management Settings
  - Data

The main content area displays the "User Detail" for Ms Kalasaraswathi. The user's information is as follows:

Field	Value	Field	Value
Name	Ms Kalasaraswathi	Role	Salesforce
Alias	MKala	User License	System Administrator
Email	kalasaraswathi83@gmail.com	Profile	Active
Username	kala@suselagmail.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	User1678347159553721818	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Thiuru kolanjappar	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input checked="" type="checkbox"/>
Division		Chat User	<input type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver	Manager	Data.com User Type	<a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Federation ID		Debug Mode	<input type="checkbox"/> <a href="#">i</a>
App Registration: One-Time Password Authenticator	<a href="#">iConnect</a> <a href="#">i</a>	High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>
App Registration: Salesforce Authenticator	<a href="#">iConnect</a> <a href="#">i</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">i</a>

The bottom of the screen shows the Windows taskbar with the search bar, task view button, and several application icons. The system tray displays the date and time: 10:15 AM, 4/12/2023.

### Report:

Browser tabs: New Tab, New candidates Report | Salesforce

URL: [thirukolarjiappar2-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000E7PxcEAF/view?queryScope=userFolders](https://thirukolarjiappar2-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000E7PxcEAF/view?queryScope=userFolders)


Search: Search...

Navigation: Candidate Internal ... | semesters | internal results | candidates | course details | lecture details | Reports

Report: candidates  
**New candidates Report**

Enable Field Editing

Total Records: 0



No Results

No records returned. Try editing report filters.

Row Counts: ☐ | Detail Rows: ☒ | Subtotals: ☒ | Grand Total: ☒

Windows taskbar: Type here to search, 34°C Sunny, 11:52 AM, 4/12/2023

Candidate field and relationship:



candidate | Salesforce

thirukolanjappar2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003o4p4/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
candidate

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
Candidate	Candidate__c	Text(30)		
candidate Name	Name	Text(80)		✓
course detail	course_detail__c	Text(30)		
Created By	CreatedById	Lookup(User)		
internal results	internal_results__c	Text(30)		
Last Modified By	LastModifiedById	Lookup(User)		
lecturer details	lecturer_details__c	Text(30)		
Owner	OwnerId	Lookup(User,Group)		✓

Windows Taskbar: Type here to search, 34°C Sunny, 11:53 AM, 4/12/2023

Course details field and relationship:

course detail | Salesforce

thirukolanjappar2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003o4pT/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
course detail

Details

Fields & Relationships  
4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
course detail Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Windows Taskbar: Type here to search, 34°C Sunny, 11:53 AM, 4/12/2023

## Lecturerdetails field and relationship:

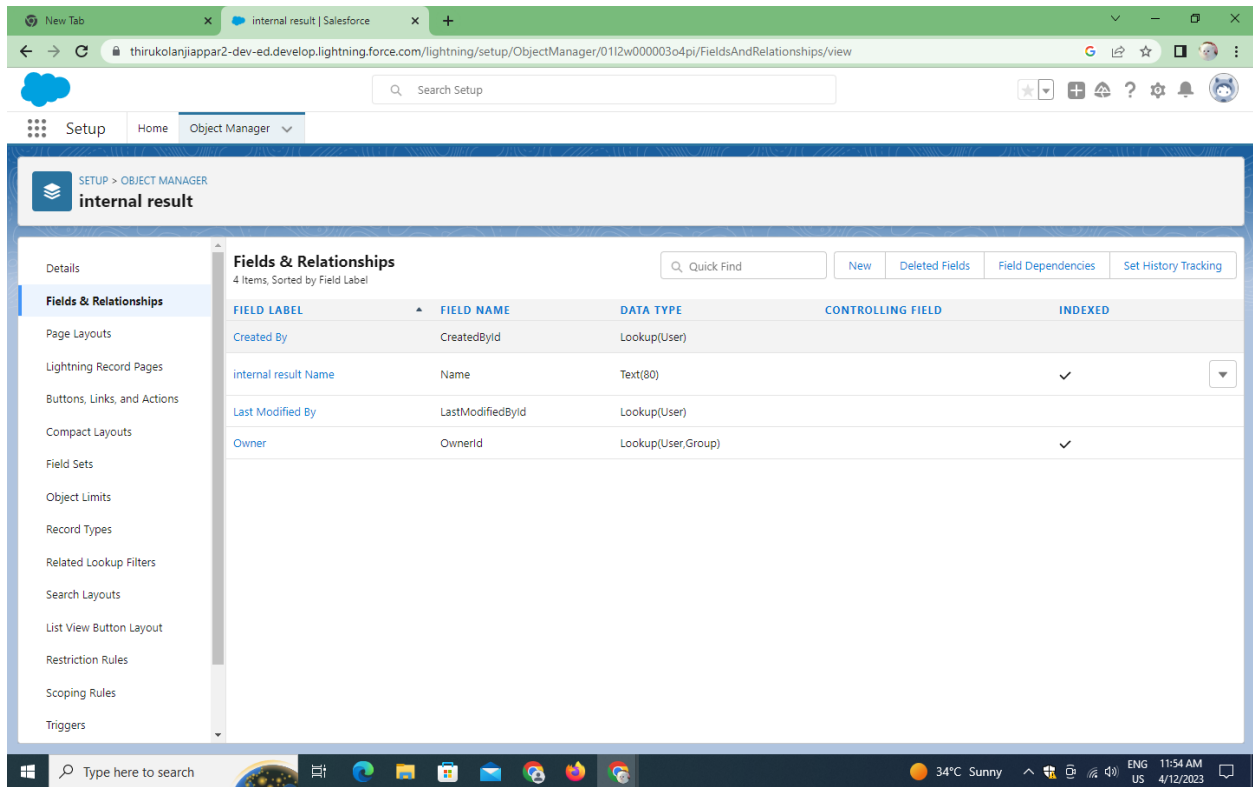
The screenshot shows the Salesforce Setup interface for the 'lecture detail' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers.

The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'lecture detail' object. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are four items listed, sorted by Field Label.

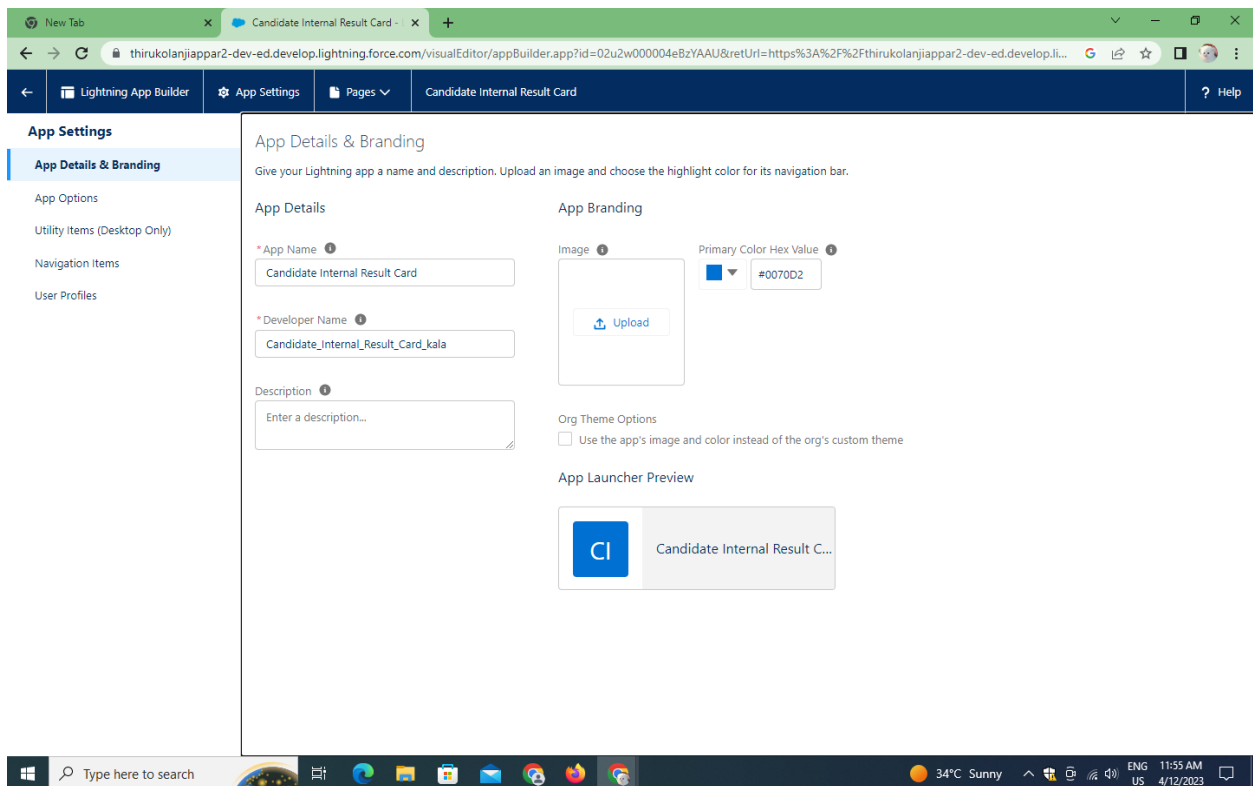
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
lecture detail Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

The bottom of the screen shows the Windows taskbar with the search bar, taskbar icons, and system tray information including temperature (34°C), weather (Sunny), and date/time (11:54 AM, 4/12/2023).

## Internal result field and relationship:



Candidate internal result card:



thirukolanjiappar2-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004eBzYAAU&retUrl=https%3A%2F%2Fthirukolanjiappar2-dev-ed.develop.li...

Lightning App BuilderApp SettingsPagesCandidate Internal Result CardHelp

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor

Setup and Personalization

Navigation and Form Factor

Setup and Personalization

Navigation Style

Standard navigation

Console navigation

Supported Form Factors

Desktop and phone

Desktop

Phone

Setup Experience

Setup (full set of Setup options)

Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

javascriptvoid(0);

Type here to search

34°C Sunny

ENG US

11:55 AM

4/12/2023

thirukolanjiappar2-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004eBzYAAU&retUrl=https%3A%2F%2Fthirukolanjiappar2-dev-ed.develop.li...

Lightning App BuilderApp SettingsPagesCandidate Internal Result CardHelp

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Utility Items (Desktop Only)

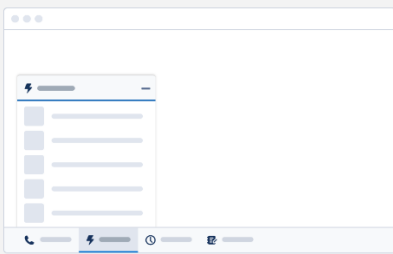
Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment

Default

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



To enable the utility bar for this app, add a utility item.

Type here to search

34°C Sunny

ENG US

11:55 AM

4/12/2023

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

- Account Brands
- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets

Selected Items

- semesters
- candidates
- course details
- lecture details
- internal results

Lightning App Builder | App Settings | Pages | Candidate Internal Result Card | Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User
- Customer Community User

Selected Profiles

- System Administrator

Lightning App Builder | App Settings | Pages | Candidate Internal Result Card | Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles**

Report:

thirukolanjiappar2-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

Candidate Internal ... semesters internal results candidates course details lecture details Reports

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Folder	Description	Created By	Created On	Subscribed
Recent	New candidates Report	Private Reports		Ms Kalasaraswathi	28/3/2023, 10:03 am	
Created by Me	Sample Flow Report: Screen Flows	Public Reports	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Automated Process	9/3/2023, 1:02 pm	

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Type here to search

34°C Sunny

ENG 11:57 AM US 4/12/2023

## Dahsboard:

thirukolanjiappar2-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Search...

Candidate Internal ... semesters internal results candidates course details lecture details Reports Dashboards

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	kaladashboard		Private Dashboards	Ms Kalasaraswathi	3/4/2023, 9:41 am	

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Type here to search

34°C Sunny

ENG 11:57 AM US 4/12/2023

#### **4 Trailhead Profile Public URL:**

Kalasaraswathi

<https://trailblazer.me/id/ksaraswathi4>

eswari

<https://trailblazer.me/id/eeswari7>

ganga

<https://trailblazer.me/id/gishu1>

dharani

<https://trailblazer.me/id/kdharani2003>

gayathri

<https://trailblazer.me/id/kdharani2003>

harikrishnan

<https://trailblazer.me/id/hkrishnan67>

#### **5. ADVANTAGE AND DISADVANTAGE**

##### **Advantages of CRM:**

It allows for more effective sales and marketing. Having huge amounts of data on customer interactions enables an organization to build up a clearer picture of its customers.

It can speed up the sales conversion process. A CRM system integrated within a marketing campaign allows insights into the interests of prospective customers. It increases staff productivity, lowers time costs and boosts morale. Quaint as it may seem, paperwork is still a significant part of many business day-to-day operations.

It enables widely dispersed teams to work closely. Companies often have parts of their operations away from their home base for a multitude of reasons- cheaper operations costs, proximity clients, or greater ease in providing on-site

technical support.

Can improve customer loyalty through exceptional experience. The hallmark of excellent service is being able to intelligently and quickly address queries and problems.

### **Disadvantages of CRM:**

Staff over-reliance on CRM may diminish customer loyalty through a bad experience. They often become helpless in the face of questions from clients where the information is not on the system and which requires lateral thinking to solve the problem.

Security concerns associated with centralized data. There are risks associated with keeping a lot of data in one place.

The excess initial time and productivity cost of implementation. There will be a steep learning curve for staff with any new system.

In certain businesses where customer transactions are highly standardized may not benefit from a CRM system.

A CRM system works best where personalization is required in client /company interactions and where there are multiple touch points over time between the clients and the business across departments.

## **6. APPLICATIONS:**

- ☐ Tracking customers.
- ☐ Collecting data for marketing.
- ☐ Improving interactions and communications.
- ☐ Streamlining internal sales processes.
- ☐ Planning your operations.
- ☐ It helps you make smarter decisions than your decisions.
- ☐ A CRM saves important data in extensive customer and contact lists.



## **7. CONCLUSION:**

Customer Relationship Management is a business strategy that enables a business organization to maximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires.

It enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

## **8. FUTURE SCOPE:**

The scope of CRM includes a wide range of activities, from managing customer contact information to developing personalized marketing campaigns.

In order to be effective, CRM must be tailored to the specific needs of each business. As such, the scope of CRM can vary greatly from one company to the next.

Customer satisfaction has replaced customer experience as the top sales metric. Customers are fundamentally changing, and it goes beyond simple demographics. There's a change in how all customer segments across business-to-business and business-to-consumer select who and why they buy from one company or another, as well as when they buy.

The better the marketing data, insights and customer-centric knowledge driving decisions, the more effective every marketing tactic and strategy will be.