Customer Relationship Management

Title	Salesforce CRM
Industry	Retail and Consumer Products Department, Customer Relationship Management
Function	Customer Relationship Management
Background	Customer relationship management (CRM) is a system for managing a company's interactions with current and future customers. It often involves using technology to organize, automate and synchronize sales, marketing, customer service, and technical support. This process contains 4 stages 1. Lead generation: this process include all the marketing & non-marketing activities which result in contacting the person 2. Prospects: This stage refers to qualified prospects that could buy one day, but aren't yet ready for engagement with sales. "Qualified" denotes the right kind of person at the right kind of company, as determined by our "fit" scoring rules. Opportunity:- when the lead 3. Opportunity: - The sales team has accepted these leads and added them to the pipeline as a deal they are actively working. 4. Accounts:-The one with whom we are doing business 5. Contracts: - We have closed these deals and won new customer business.
Data Source	Salesforce Marketing Suite
Technology	Qlikview11.2
Story/ Analysis	• The First Sheet Dashboard show three comparison, first between the Current quarter, Last Year Quarter, and overall. • It shows the total amount we earn in those month, and opportunities we got in that month. It also shows the top 3 closed opportunity and bottom 3 closed opportunity, with open opportunity. It also show the lost opportunity and win opportunity in that month. • The overall show, the total lost, won and open opportunity, It also show the sales cycle and number of respected leads/opportunity/Prospect/Account/ contract in that stage • Second dashboard shows the Opportunity analysis, it first define the Win rate, win, lost, and open opportunity in that stage. It provide many filters for analysing easily. • It shows the opportunity summary report which show the amount according to company and its probability to convert into Account. Opportunity by probabilities to close, Amount by opportunity stages, Average deal size, Number of Opportunity by Stage • Third dashboard shows the Account analysis. This dashboard shows the account and amount we owe to them. And account by city to show from where our most profitable customer belong. • Fourth Dashboard shows the Campaign analysis: - it shows the type of campaign which are most profitable to us. How campaigns differ in budget and actual spending, and also the expected Revenue. For example webinar has less cost but expected revenue is second largest. • It also shows the different campaigns, their duration, total amount spend on those campaigns. Total leads from campaigns and converted leads. • The Fifth dashboard shows account and number of cases for that account, like electrical, mechanical, structural, electronics, and other
Value/ Decision	• It shows the overall money in different stages. It help you understand the forecasted amount
Cosmetics/ Look & Feel	• Use the fill to needle In gauge • Hide and show using button

Technical/ Capability	• Set analysis • aggregation