CRM project

“CRM stands for Customer Relationship Management. It's a technology used to manage interactions with customers and potential customers. A CRM system helps organisations build customer relationships and streamline processes so they can increase sales, improve customer service, and increase profitability.” (https://www.salesforce.com/uk/learning-centre/crm/what-is-crm/)

We would like to develop a CRM for tracking and organising clients and buyers at different stages in their buying journey with us. This will be in the form of a webapp so we can share this internally and all the staff can update things into it.

This will consist of two parts: A contacts list and a progress tracker.

**Contacts list**: This will be a way of entering all of our customers into one neat searchable database. It will be a form for entering details into a database for the CRM tracker to use.

Contact info options to implement:

* Name
* Email
* Phone Number
* Address/City/Country
* Website
* Industry/Profession
* Who met them?

Diagram

Description automatically generated

Some of these answers can be optional so the form can still be submitted without them. These are: City, social media and notes.

It isn’t a problem to submit with only one of the email/phone contact sections filled out. However, we need the form to check at least one has before submitting to the database.

The contact details must be available to edit in the future from the contacts list.

The contact list should be a searchable directory. Being able to search certain things by a tag would be very useful for us too. These are: City, Country, industry/profession.

**Progress tracker**

Each contact should be at a certain place along our contact tracker, this is from “Establish contact” to “Paying customer”.

Stages of progress:

* Establish contact
* Contact made
* 1to1 meeting scheduled?
* Attended a meeting with client
* Interested in our services? (split into our products chatpal and socialpal or both)
* Follow-up meeting scheduled?
* Follow-up meeting attended (reminding)
* Outcome
* Buy or not