PROJECT REPORT TEMPLATE

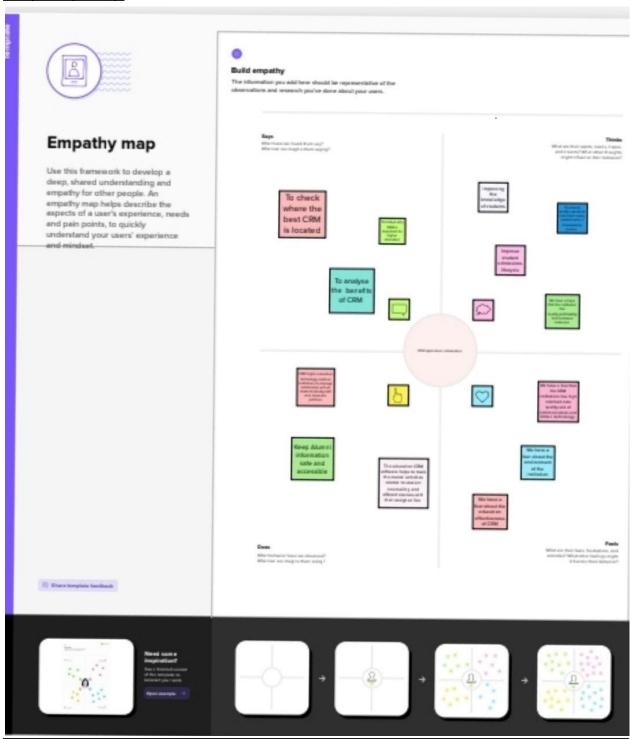## 1 INTRODUCTION

Overview

Customer Relationship Management (CRM) software is used by businesses to manage interaction with current and future customers.

Today's CRM have evolved into a confluence of multiple functions but the primary objective of a CRM is to serve the customers better, increase retention and manage the sales pipeline.
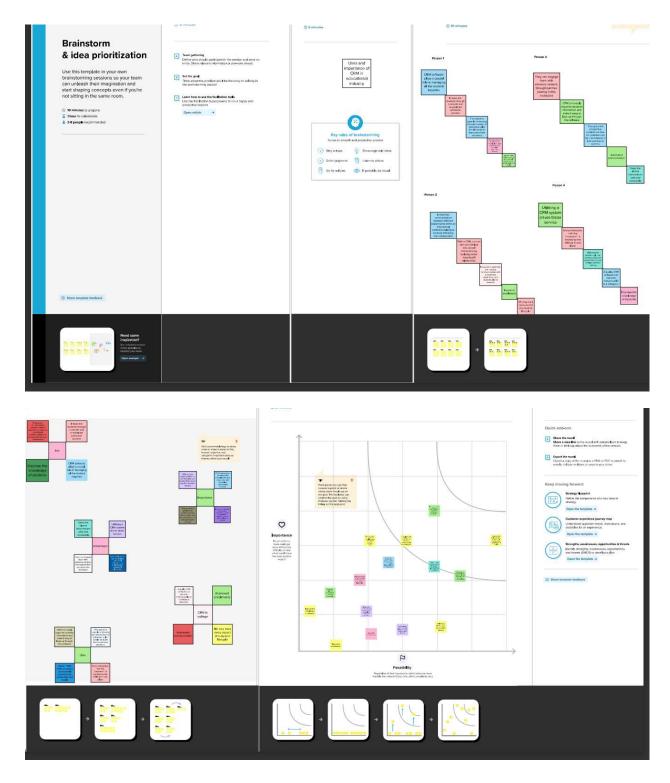
Purpose

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.

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2 PROBLEM DEFINITION AND DESIGN THINKING

Empathy Map

Ideation and brainstorming map

3 RESULT

Data Model:

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OBJECT NAME	FIELDS IN THE OBJECT	
Student	**FIELD LABEL**	**DATA TYPE**
	Class	Number(18, 0)
	Created by	Lookup(User)
	Last modified by	Lookup(User)
	Marks	Number(18, 0)
	Parent address	Test area(255)
	Parent number	Phone
	Results	Picklist
	School	Master Detail(school)
	Students name	Test
Parent	**FIELD LABEL**	**DATA TYPE**
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Owner	Lookup(User, Group)
	Parent Name	Test(80)

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	FIELD LABEL	DATA TYPE
School	Address	Text Area(255)
	Created By	Lookup(User)
	District	Text Area(255)
	Highest marks	Roll-Up Summary(MAX students)
	Last Modified By	Lookup(User)
	Number of students	Roll-Up Summary(COUNT students)
	Phone number	Phone
	School	Text Area(255)
	School Name	Text(80)
	schools	Master-Details(school)
	state	Text Area(255)

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Mark		
	FIELD LABEL	**DATA TYPE**
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Mark Name	Text(80)
	Owner	Lookup(User, Group)

Schools		
	FIELD LABEL	**DATA TYPE**
	Created By	Lookup(User)
	Last Modified By	Lookup(User)
	Owner	Lookup(User, Group)
	School Name	Text(80)

Activities and screenshots

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Activity1:

Activity2:
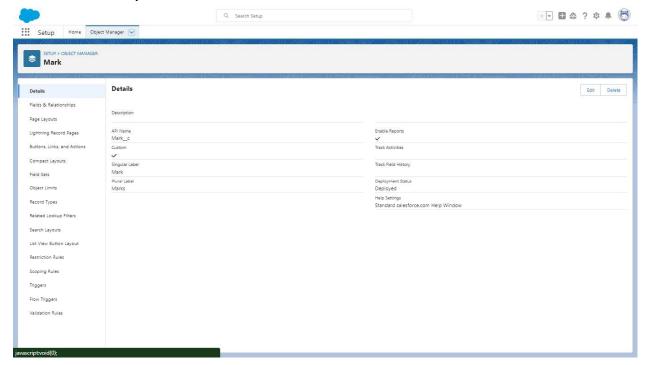
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Activity3:

Activity4:

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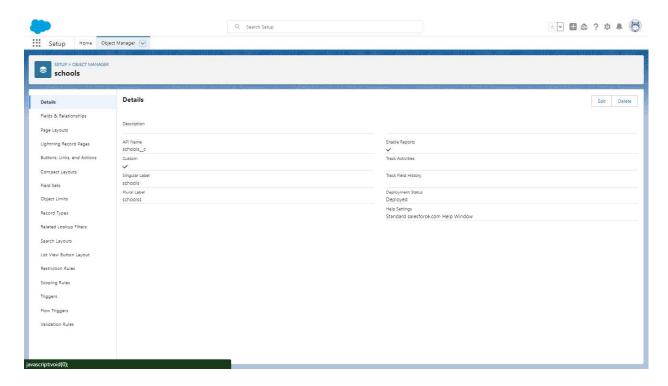
Activity5:

4 Trailhead Profile Public URL

Team Lead - https://trailblazer.me/id/kaaviya2121

Team Member 1- https://trailblazer.me/id/priya1919

Team Member 2- https://trailblazer.me/id/savitha1201

Team Member 3- https://trailblazer.me/id/sivaranjanir

5 ADVANTAGES & DISADVANTAGES

List of advantages

- ✓ Reduction in the cost of expenses
- ✓ Improving the quality of service/product

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- ✓ Improving the organization management process
- ✓ Increased customer loyalty
- ✓ Track and increase the number of potential clients
- ✓ History of work with each student
- ✓ Relevant and visual MIS analytics reports
- ✓ Easy integrating with third party services
- ✓ Planning and multitasking
- ✓ Easy implementation
- ✓ Increase in repeat courses sales
- ✓ Elimination of errors in processes

List of disadvantages

- ❖ CRM costs. One of the greatest challenges to CRM implementation is cost....
- ❖ Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation....
- ❖ Poor communication....
- ❖ Lack of leadership....

6 APPLICATIONS

CRM Solutions:

A customer relationship management(CRM) solution helps you find new customers, win their business, and keep them happy by organising customer and prospect information in a way that helps you

build stronger relationships in a way that helps you build stronger relationships with them and grow your business faster.

7 CONCLUTION

It would probably be particularly difficult to develop and install customer centric strategies. If CRM is used must be with the backing of those at the highest level and it must be planned carefully. A process must be gone through which would take note of CRM theory and use the experiences of others to maximise the chances of success.

8 FUTURE SCOPE

✦ Customer satisfaction has replaced customer experience as the top sales metric.

✦ To meet customer-centric goals, CRM systems need to evolve with greater precision and predictive analytics, as well as a focus on customer needs and behaviour.

✦ As AI becomes more prominent in the sales space reps will transition to more customer-care-focused tasks.

✦ CRM solutions act as a single source of truth for organizations looking to unity operations across departments.

✦ Organizations seek to automate rudimentary, day-to-day functions to allow staff to focus on more pressing tasks.

✦ As customers increasingly demand hyper-personalized experiences, CRMs are adapting to deliver mass personalization at scale...