Project Report Template

CRM-APPLICATION FOR SCHOOL/COLLEGES

1   INTRODUCTION

1.1 Overview

Customer relationship management (CRM) is the combination of practices, strategies

And technologies that companies use to manage and analyze customer interactions and data

Data throughout the customer lifecycle. The goal is to improve customer service relationships

And assist in customer retention and drive sales growth.
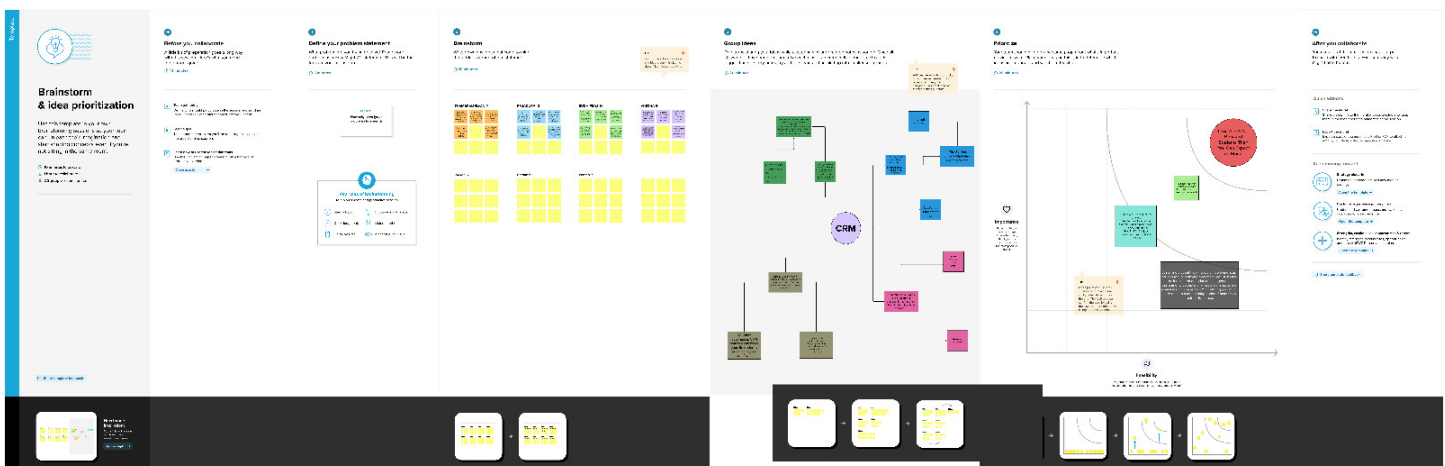
1.2   PURPOSE

Customer relationship management (CRM) is a technology for managing all your

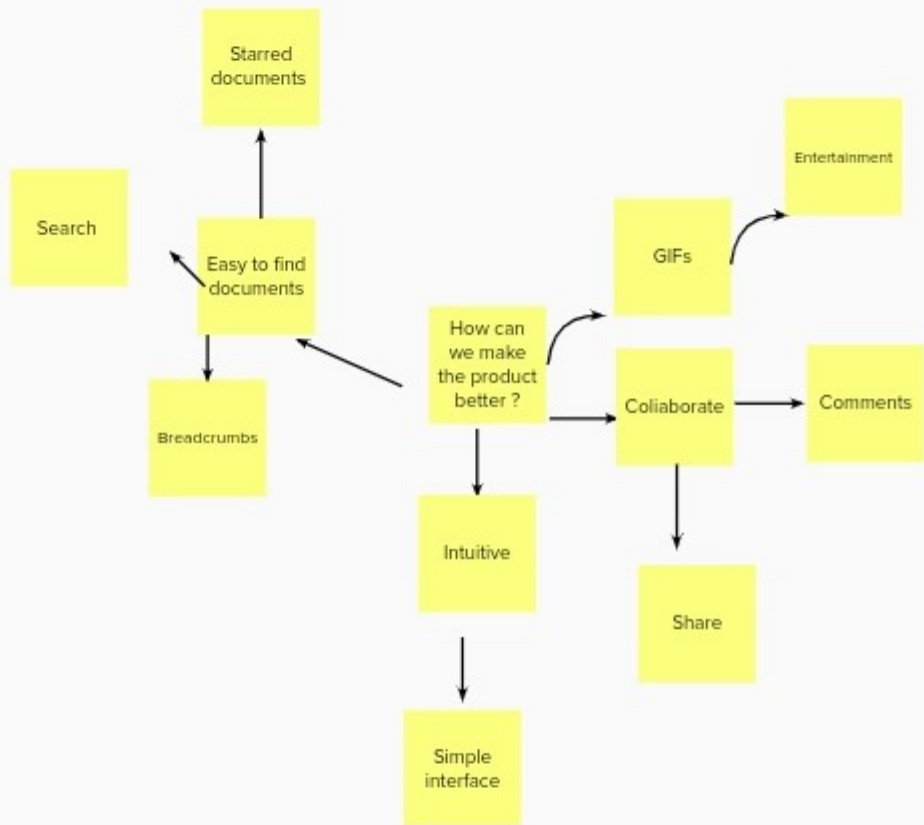Company's relationships and interactions with customers and potential customers.

The goal is simple improve business relationships. A CRM system helps companies stay

Connected to customers, streamline, processes, and improve profitability.

2   Problem Definition & Design Thinking

2.1 Empathy Map

2.2. Ideation & Brainstorming Map

Starred
documents

Search

Easy to find
documents

Entertainment

GIFs

How can
we make
the product
better ?

Coliaborate

Comments

Breadcrumbs

Intuitive

Share

Simple
interface

3RESULT

3.1 Data Model

Object name	Fields in the Object
School	<table><tr><td>**Field Label**</td><td>**Data Type**</td></tr><tr><td>Address</td><td>Text Area</td></tr><tr><td>District</td><td>Text Area</td></tr><tr><td>State</td><td>Text Area</td></tr><tr><td>school</td><td>Text Area</td></tr><tr><td>Phone Number</td><td>Phone</td></tr><tr><td>Number of Students</td><td>Roll-up summery</td></tr><tr><td>Highest Marks</td><td>Roll-up summery</td></tr></table>

Object name	Fields in the Object

Student	Field Label	Data Type
	Phone number	Phone
	School	Master-Detail Relationship
	Results	Picklist
	Class	Number
	Marks	Number

Parent	Field Label	Data Type
	Parent Address	Text Area
	Parent Number	Phone

3.2 Activity & Screenshot

(Milestone-2:OBJECT)

Activity-1: Creation of School Object

 # Creation of Object for School Management

(Milestone-2:OBJECT)

Activity-2: Create Student Object

 # Creation of Student Object
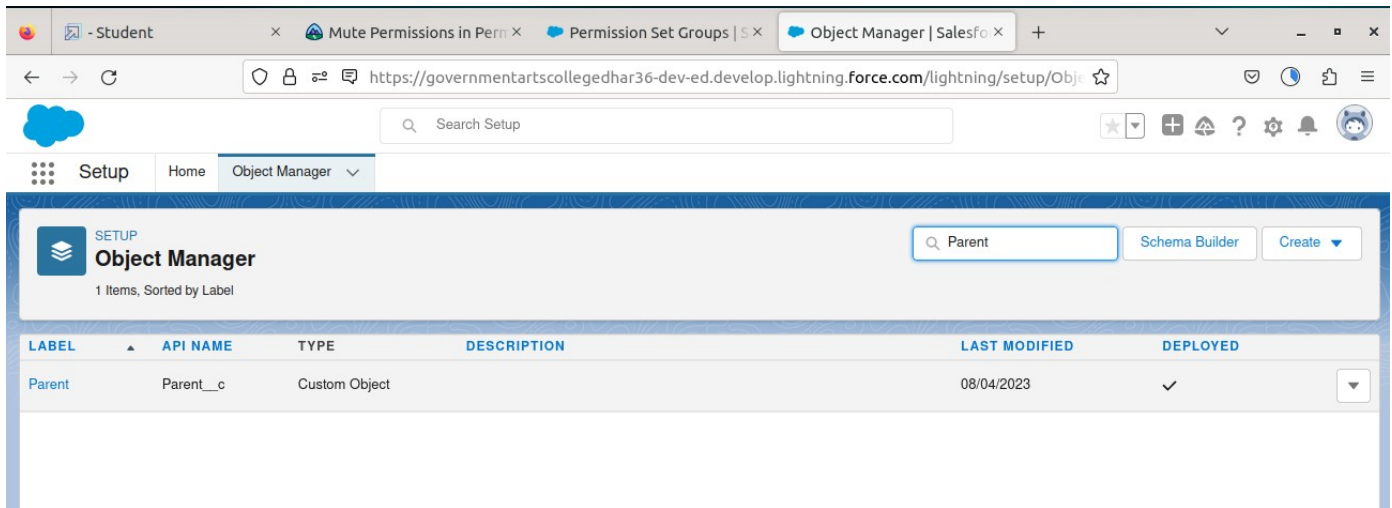
(Milestone-2: OBJECT)

Activity-2 : Create Parent Object

Creation of Parent Object
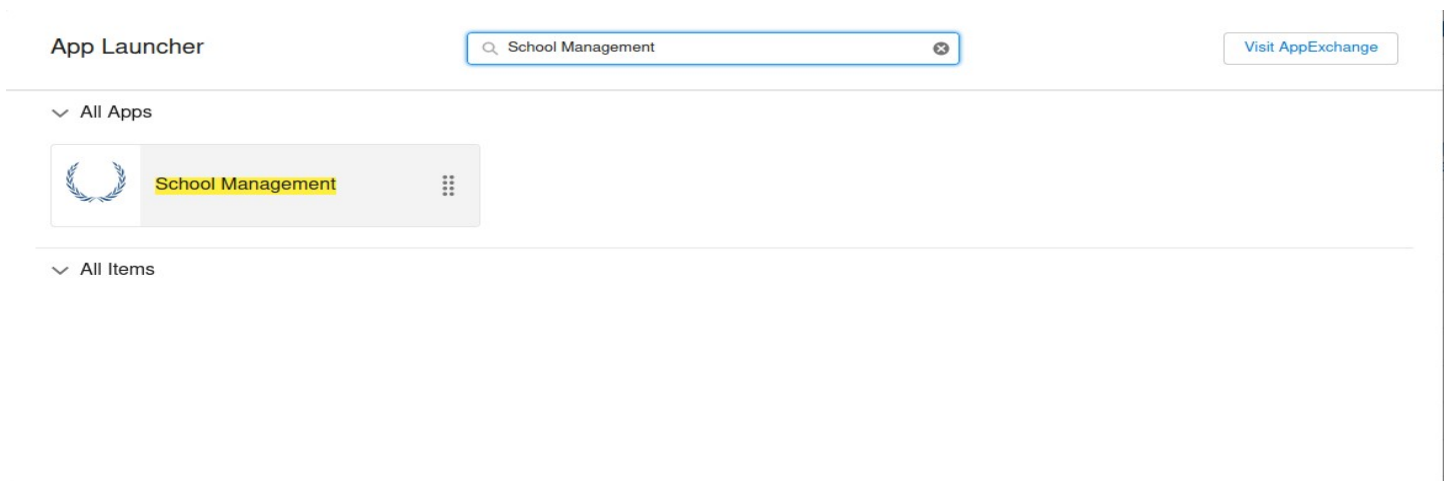
(**Milestone-3: LIGHTNING APP**)

Activity-1 : Create the School Management App

Creation School Management App

(**Milestone-4: FIELDS & RELATIONSHIP**)

Actvity-1 : Creation of fields for the School Objects

Creation of fields for the School Object

(Milestone-4: FIELDS & RELATIONSHIP)

Actvity-2 : Creation of fields for the Student Objects

Creation of fields for the Student Object

(Milestone-4: FIELDS & RELATIONSHIP)

Actvity-3: Creation of fields for the Parent Objects

Creation of fields for the Parents Object

(Milestone-5: PROFILE)

Actvity-1 : Creation on Profile

Creation on Profiles

(Milestone-6: USERS)

Actvity-1 : Creating a Users

Creating a Users

(Milestone-7: PERMISSION SETS)

Actvity-1 : Permission sets 1:

To Set Permissions

(Milestone-7: PERMISSION SETS)

Actvity-2 : Permission sets 2:

To Set Permissions

(Milestone-8: REPORTS)

Actvity-1 : Reports

Reports

4Trailhead Profile Public URL

Team Leader - http://trailblazer.me/id/srajn9
Team Member 1 - https://trailblazer.me/id/vinig12
Team Member 2 - https://trailblazer.me/id/tselvan49
Team Member 3 - https://trailblazer.me/id/rdurai23

5 ADVANTAGES & DISADVANTAGE

Advantages

Facilitates discovery of new customers

CRM systems are useful in identifying potential customers. They keep track of the profiles of the existing clientele and can use them to determine the people to target for maximum clientage returns.
New customers are an indication of future growth. However, a growing business utilizing CRM software should encounter a higher number of existing customers versus new prospects each week. Growth is only essential if the existing customers are maintained appropriately even with recruitment of new prospects.

Increases customer revenues

CRM data ensures effective co-ordination of marketing campaigns. It is possible to filter the data and ensure the promotions do not target those who have already purchased particular products. Businesses can also use the data to introduce loyalty programs that facilitate a higher customer retention ratio. No business enjoys selling a similar product to a customer who has just bought it recently. A CRM system coordinates customer data and ensures such conflicts do not arise.

Helps the sales team in closing deals faster

A CRM system helps in closing faster deals by facilitating quicker and more efficient responses to customer leads and information. Customers get more convinced to turn their inquiries into purchases once they are responded to promptly. Organizations that have successfully implemented a CRM system have observed a drastic decrease in turnaround time.

Enhances effective cross and up selling of products

Cross – selling involves offering complimentary products to customers based on their previous purchases. On the other hand, up – selling involves offering premium products to customers in the same category. With a CRM system, both cross and up – selling can be made possible within a few minutes of cross – checking available data.

Apart from facilitating quicker offers to customers, the two forms of selling helps staff in gaining a better understanding of their customer's needs. With time, they can always anticipate related purchases from their customer.

Simplifies the sales and marketing processes

A CRM system facilitates development of better and effective communication channels. Technological integrations like websites and interactive voice response systems can make work easier for the sales representatives as well as the organization. Consequently, businesses with a CRM have a chance to provide their customers with various ways of communication. Such strategies ensure appropriate delivery of communication and quick response to inquiries and feedback from customers.

Makes call centers more efficient

Targeting clients with CRM software is much easier since employees have access to order histories and customer details. The software helps the organization's workforce to know how to deal with each customer depending upon their recorded archives. Information from the software can be instantly accessed from any point within the organization.

CRM also increases the time the sales personnel spend with their existing customers each day. This benefit can be measured by determining the number of service calls made each day by the sales personnel. Alternatively, it could also be measured through the face – to – face contact made by the sales personnel with their existing customers.

Enhances customer loyalty

CRM software is useful in measuring customer loyalty in a less costly manner. In most cases, loyal customers become professional recommendations of the business and the services offered. Consequently, the business can promote their services to new prospects based on testimonials from loyal customers. Testimonials are often convincing more than presenting theoretical frameworks to your future prospects. With CRM, it could be difficult pulling out your loyal customers and making them feel appreciated for their esteemed support.

Disadvantages

1. A costly project

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data mitigation, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

2. Loss of collected information or records

CRM (customer relationship management) tools can be responsible for losing the customer's information as some CRM software keeps track of customers' information using remote internet connections. Due to this, sometimes organization needs to have control over the customer's information (detailed), especially when a system failure event happens. An unstable CRM can result in the loss of money in revenue for the company in the future.

3. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't correct to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

4. It eliminates the human element.

CRM is a fully automated tool that has prevented human intervention. It automatically collects all the data and processes it. CRM efficiently manages the relationship between the company and customers as it directly interacts between people and its staff. Customers can shift anywhere due to the loss of human touch, reducing sales and revenue.

5. Can be accessed by the third party

As we know, CRM collects customers' sensitive information and stores it, which other parties can misuse. For example, web hosting companies take and sell collected data to a third party that misuses the data and causes loss to people.

6. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

6 APPLICATIONS

Applications of a CRM – Examples and Strategies
* Application 1: Tracking Customers
* Application 2: Collecting Data for Marketing
* Application 3: Improving Interactions and Communications
* Application 4: Streamlining Internal Sales Processes
* Application 5: Planning Your Operations.

7CONCLUSION

Customer Relationship management is a business strategy that enables a business organization tomaximize revenue, customer satisfaction, profitability through strategic mobilization, organization, and management of customer's interests and desires. BWM has traversed numerousbusiness challenges that made it establish a CRM that will foster customer relationship as a baseline for market strengthening and diversification. BMW has diversified its market in various global markets through the initiation of the CRM systems. The system has significantly contributed to the company's financial, operational, managerial and development initiatives with a robust customer relationship that has fostered great sale of its product. Mercedes Benz operates a similar customer relationship management system just BMW and due to market power, the company has greatly diversified is customer roots to various market bases. Mercedes has majored in a customer-dealership business relationship. This has provided the company with strategic mechanization of customer retention, satisfaction and purchase behavior enhancing the

company's profitability through an increased purchase command. The two companies are among the leading CRM implementers in the automotive

8 FUTURE SCOPE

The future has arrived — at least it has in the world of customer relationship management or **CRM software**, one of the fastest growing categories of enterprise software. We are entering the era of intelligent, integrated CRM, and the future of CRM is even brighter. From small businesses to global enterprises, sales and marketing teams are adopting CRM to deliver better customer experiences, acquire and retain customers, and gain new customer-centric insights that are changing their companies for the better.