



Dr. M. G. R GOVERNMENT ARTS AND SCIENCE COLLEGE FOR WOMEN  
UG DEPARTMENT OF MATHEMATICS  
NAAN MUDHALVAN PROJECT  
III YEAR BSC MATHEMATICS

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS	
TEAM ID	NM2023TMID13283
TEAM LEADER	SANGEETHA R
TEAM MEMBERS	1.SANGEETHA G 2.SANTHIYA K 3.SANDHIYA K

## 1. INTRODUCTION:

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth. CRM systems compile customer data across different channels, or points of contact, between the customer and the company, which could include the company's website, telephone, live chat, direct mail, marketing materials and social networks. CRM systems can also give customer facing staff members detailed information on customer personal information, purchase history, buying preferences and concerns.

CRM tracking is the term given to the practice of following an entity (such as an email, activity, task, or lead) through a process.

## PURPOSE:

Implementing a CRM system is a value adding process that can bring great benefits to any business. The ultimate goal is to improve communication and interaction with real customers and leads, and to maximise their impact on the production process and business figures.

The use of CRM systems can benefit organizations ranging from small businesses to large corporations, through:

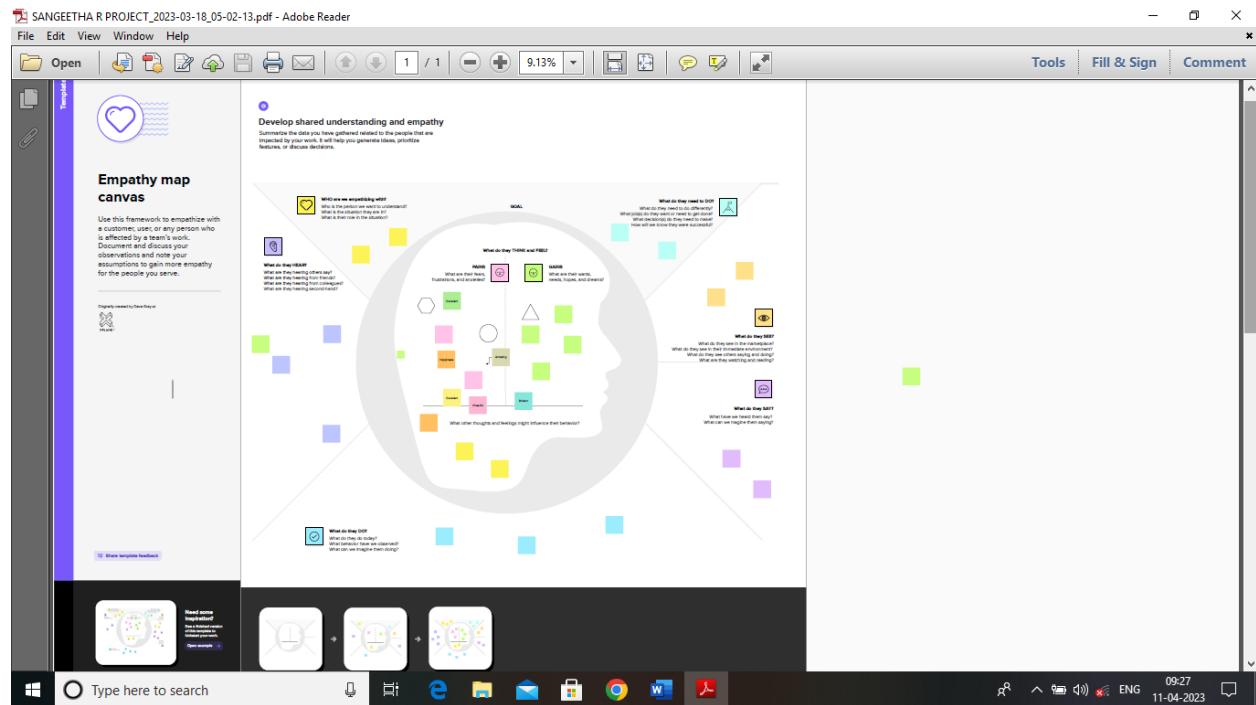
Having customer information such as past purchases and interaction history easily accessible can help customer support representatives provide better and faster customer service.

Collection of and access to customer data can help businesses identify trends and insights about their customers through reporting and visualization features.

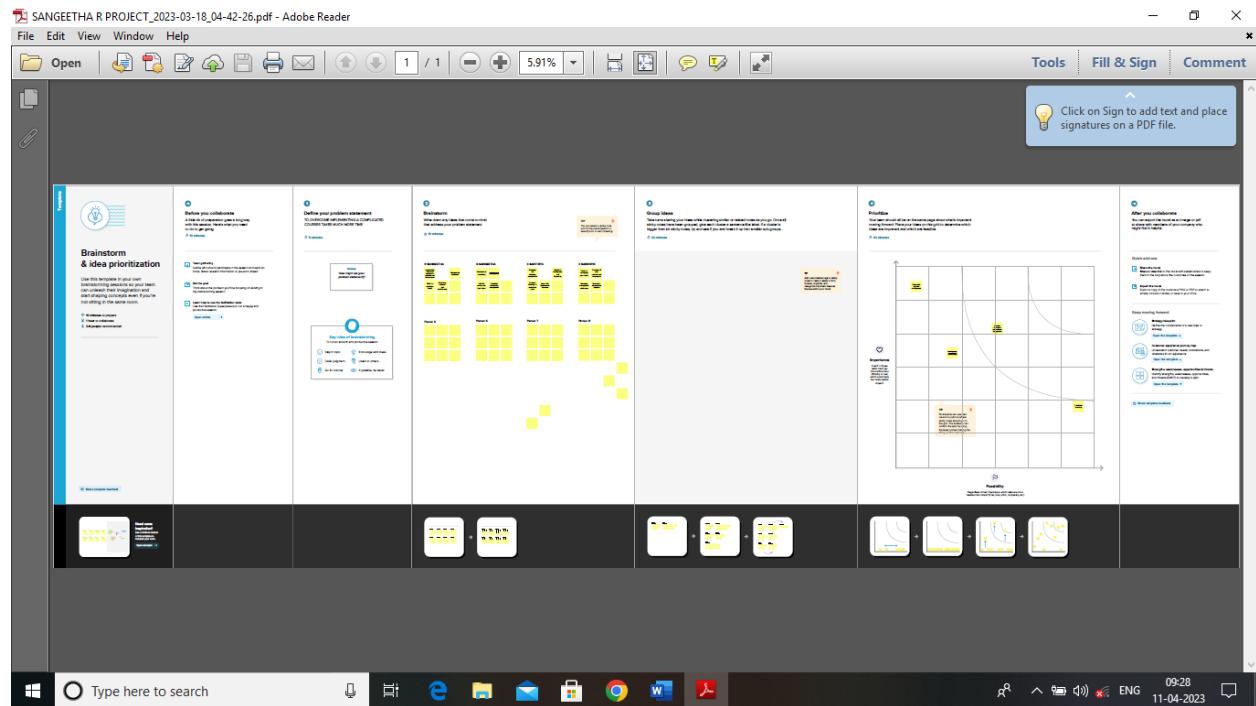
Automation of menial, but necessary, sales funnel and customer support tasks.

## 2.PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy Map



### 2.2 Ideation & Brainstorming Map



### 3.RESULT

#### 3.1 Data Model:

Object name	Field in the object	
Semester	Field label	Data type
	Semester name	Date
Candidate Internal Result	Field label	Data type
	Internal result	Date

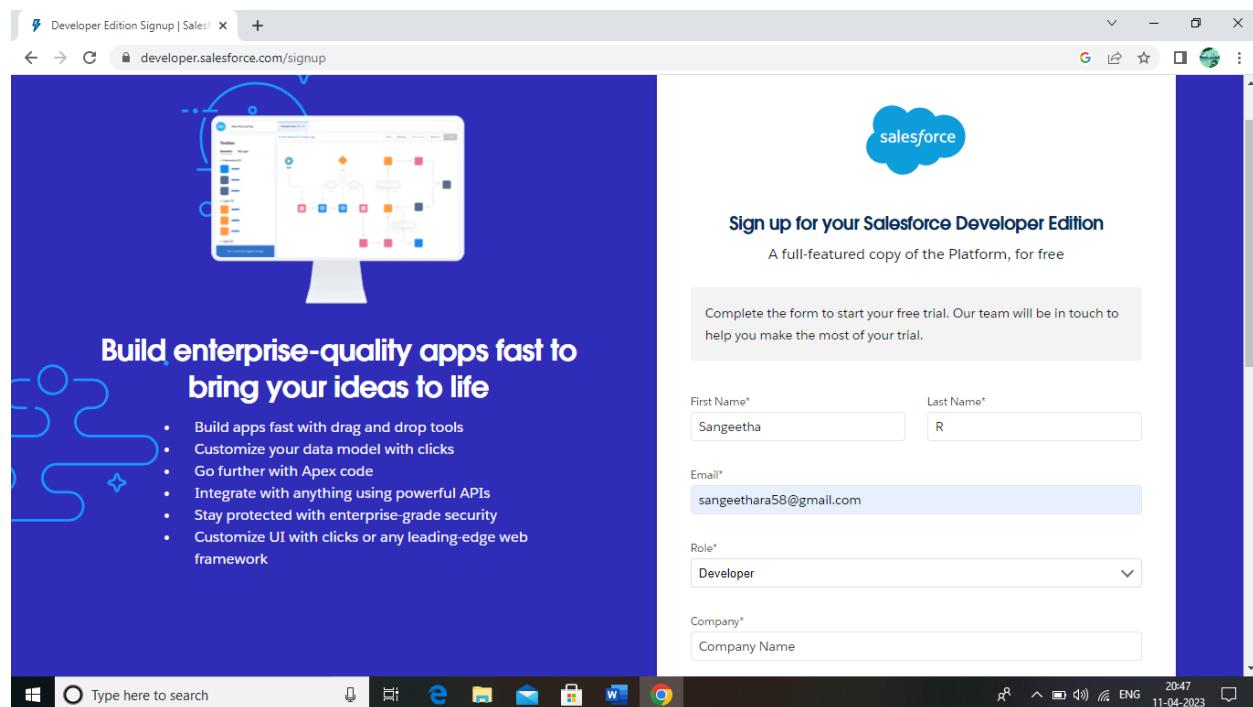
#### 3.2 ACTIVITY

##### Milestone 1: Creation Salesforce Org:

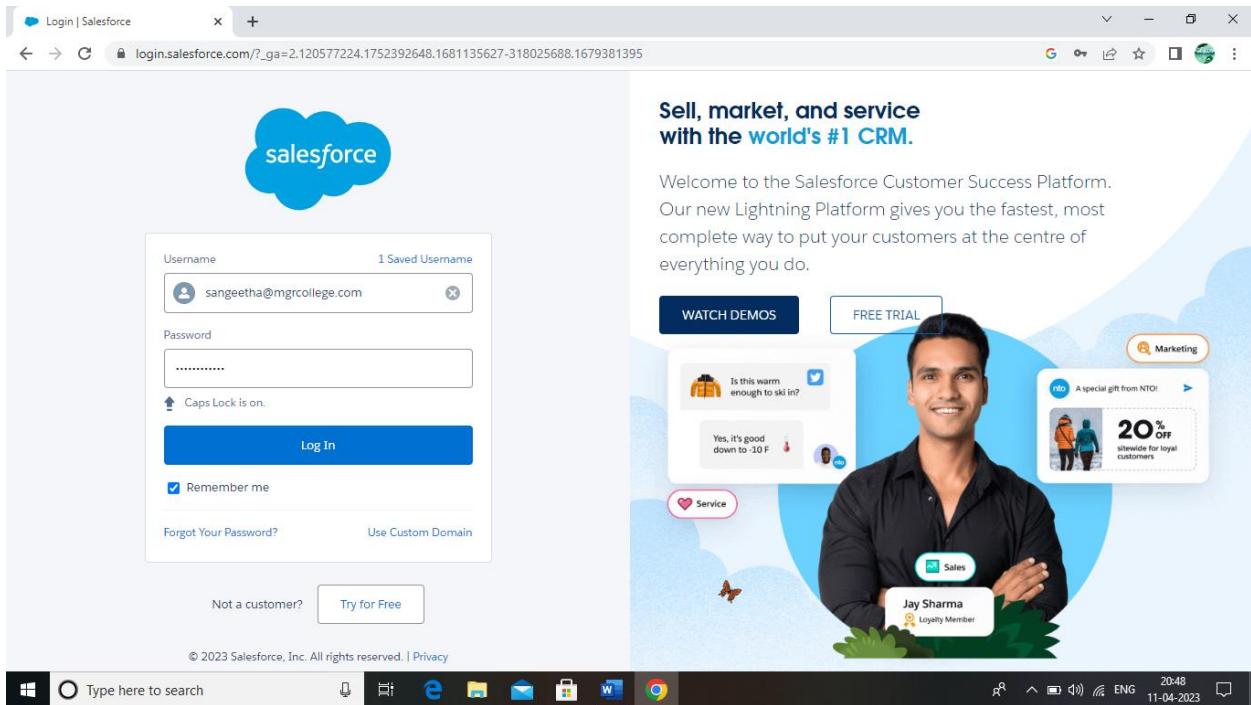
###### Activity 1

###### Creating Developer Account

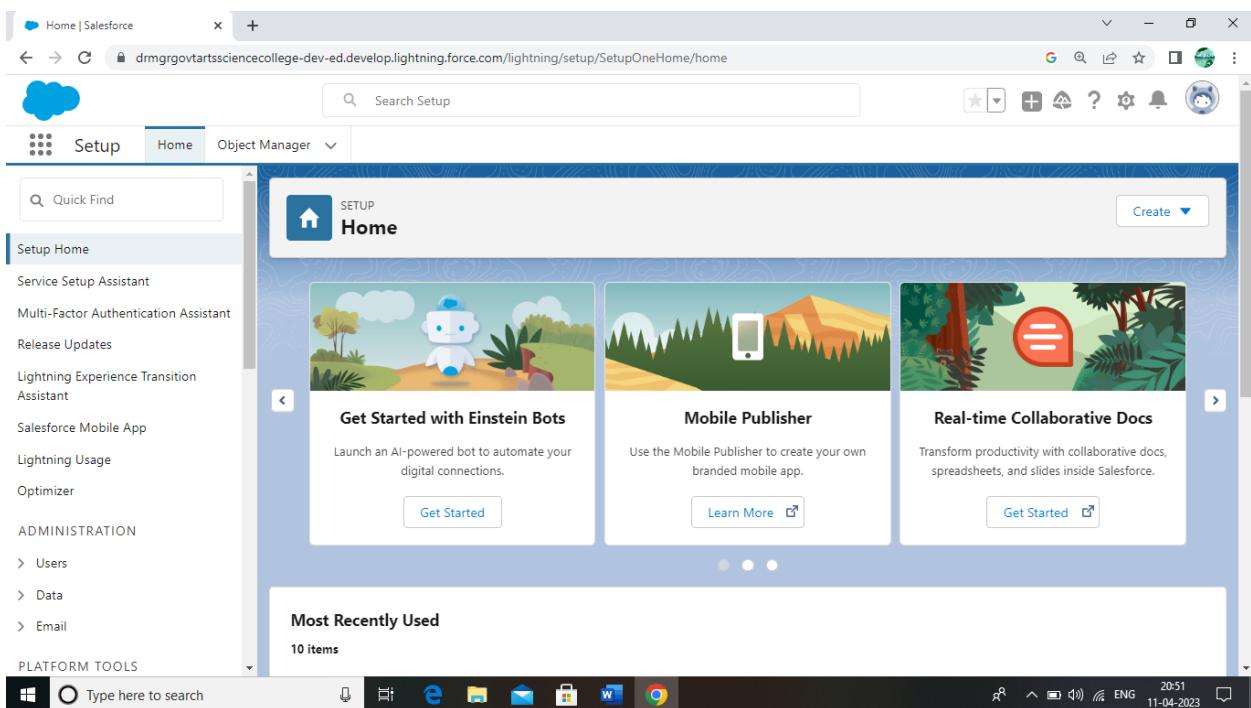
Creating a developer org in sales force.



## Account Activation

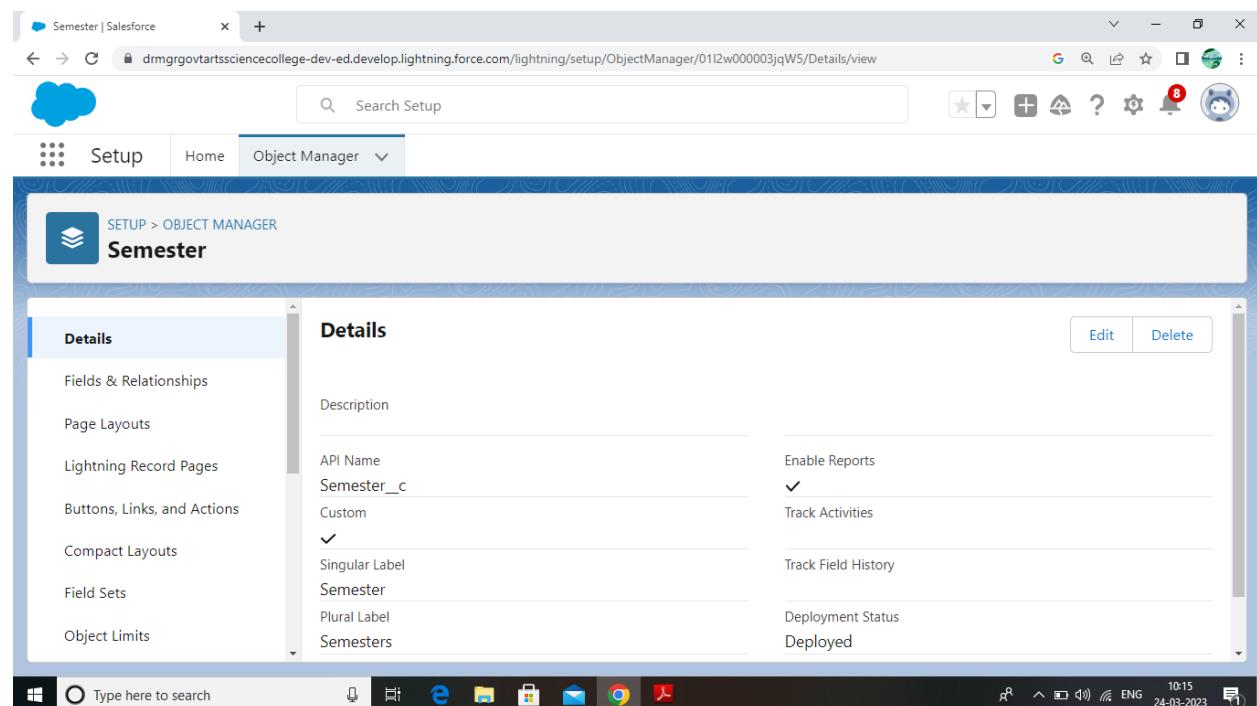


## Login To Your Salesforce Account

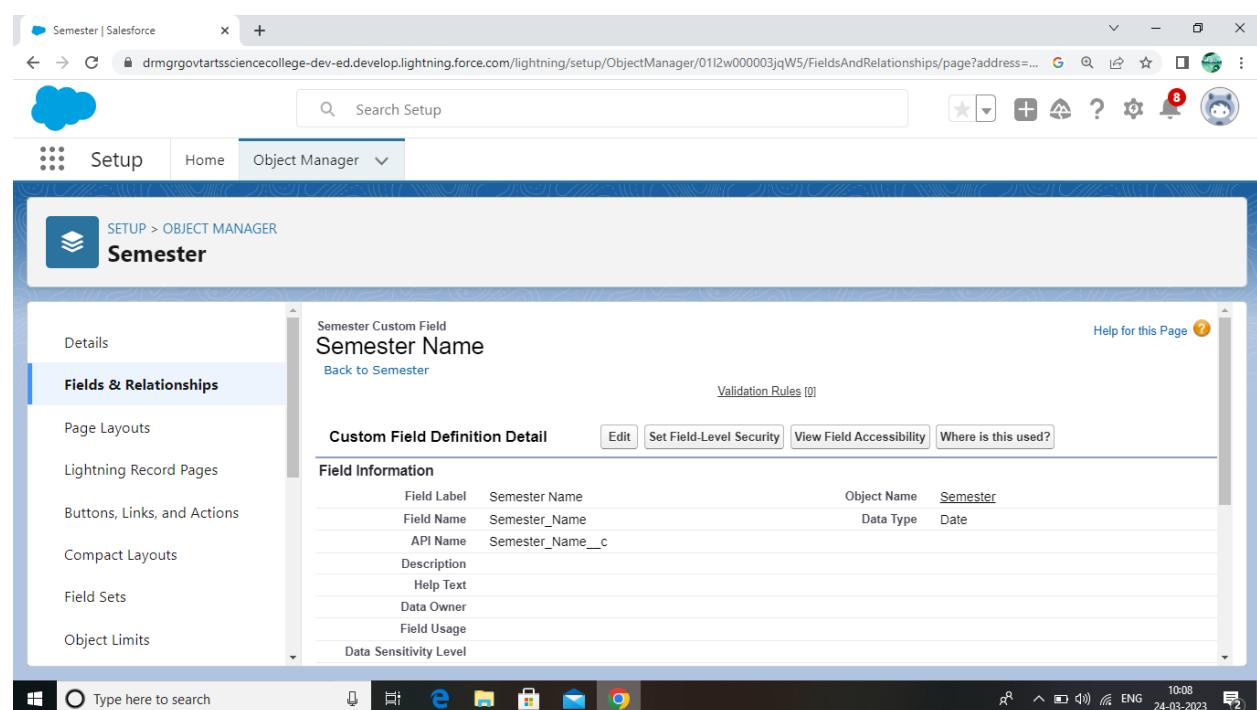


## Milestone 2: Object

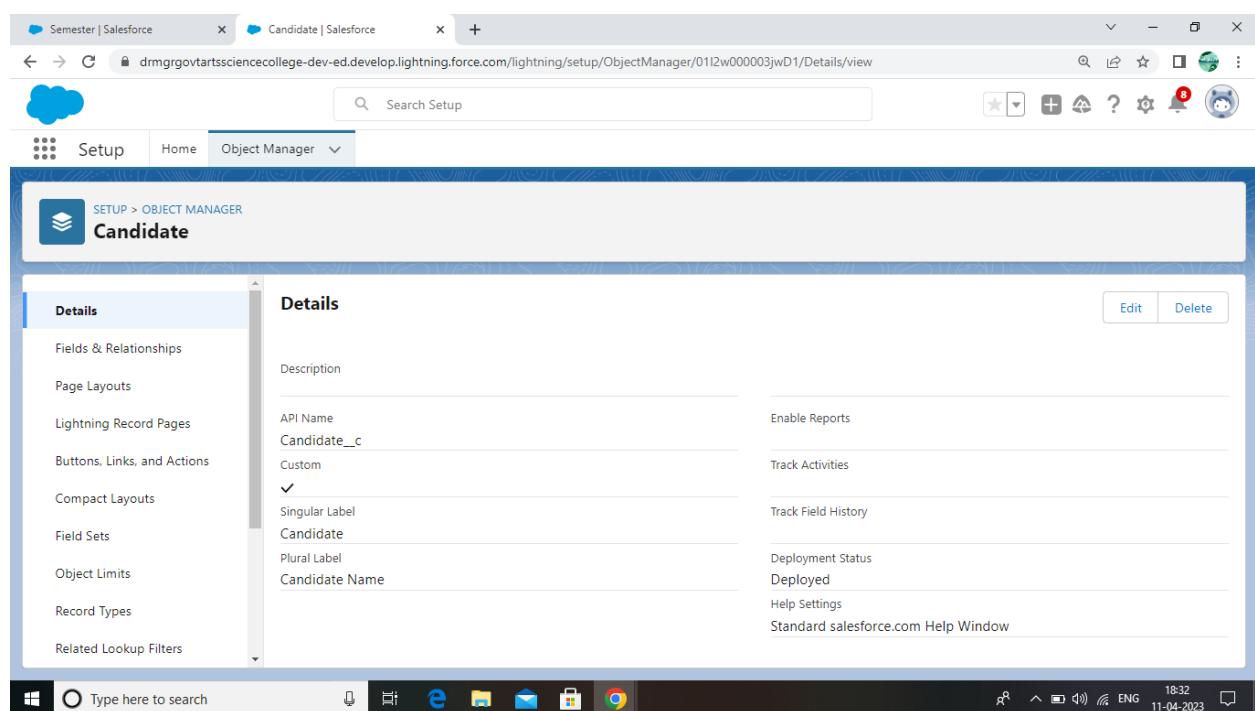
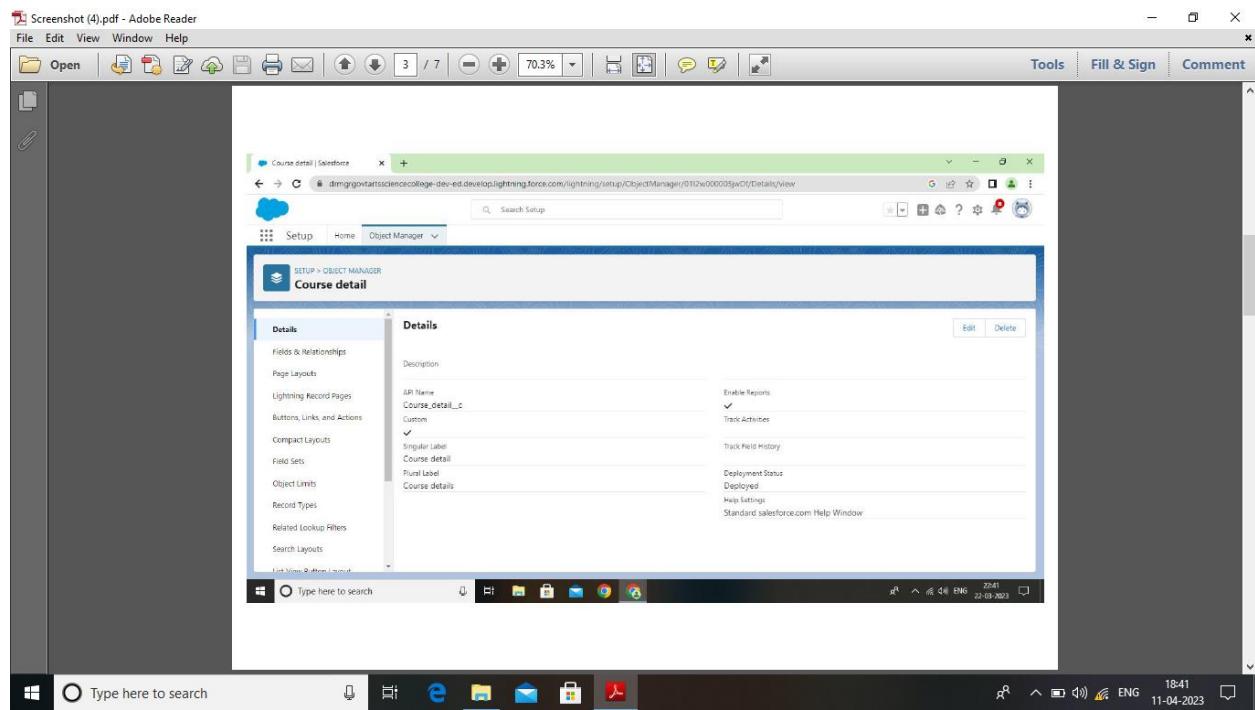
### Custom objects:

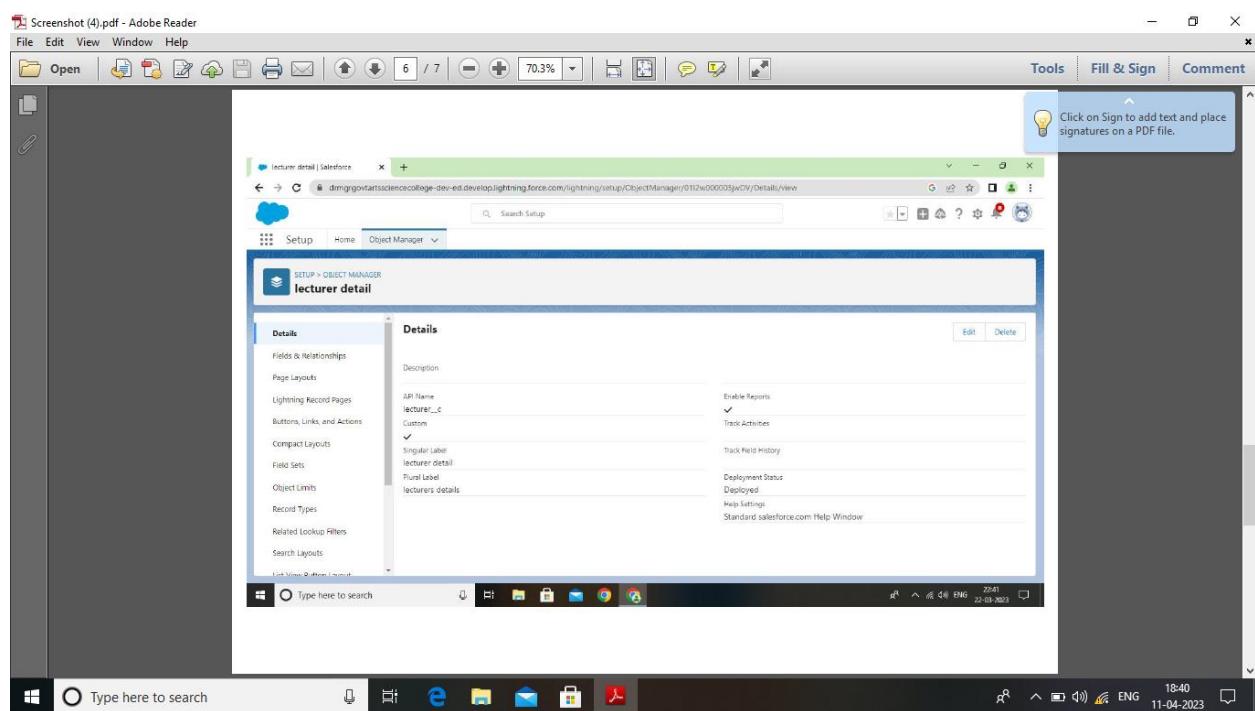
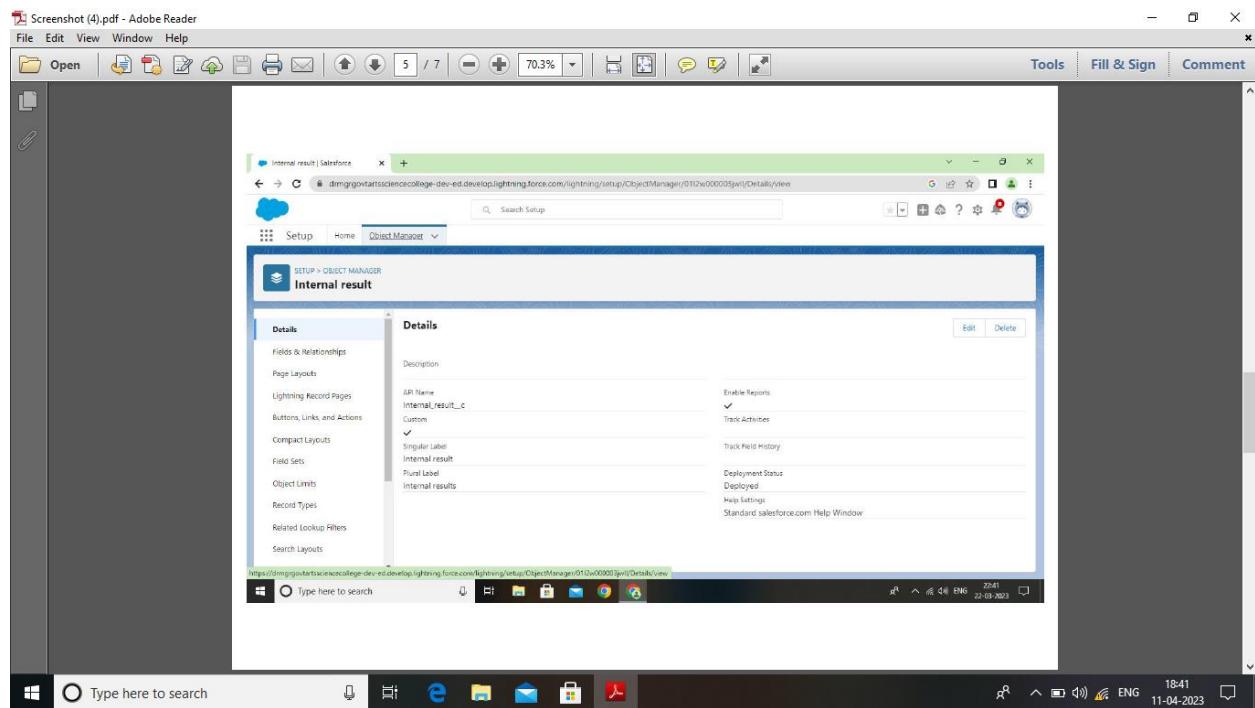


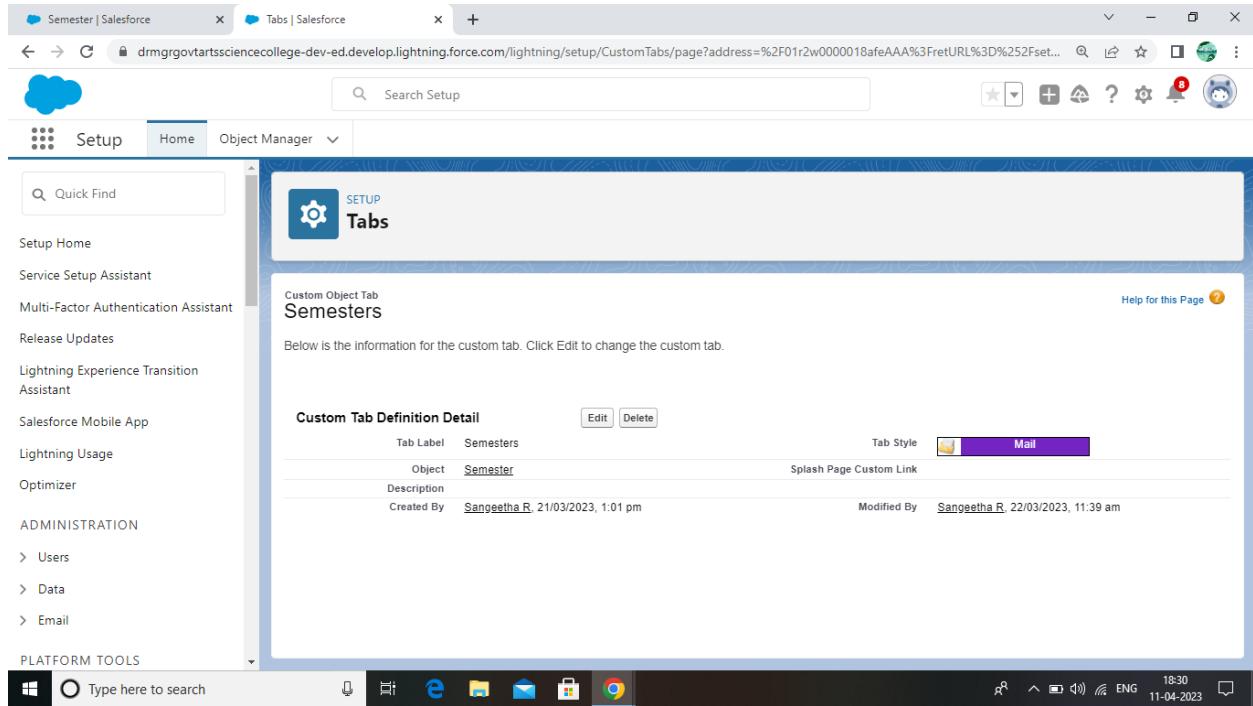
The screenshot shows the Salesforce Setup interface with the URL [drmrggovtartsciencecollege-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003jqW5/Details/view](https://drmrggovtartsciencecollege-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003jqW5/Details/view). The page title is "Semester". The main content area displays the "Details" tab for the "Semester" object. On the left sidebar, there are links for "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", and "Object Limits". The main details section includes fields for "Description", "API Name" (set to "Semester\_c"), "Enable Reports" (checked), "Custom" (checked), "Singular Label" (set to "Semester"), "Plural Label" (set to "Semesters"), "Track Activities", "Track Field History", and "Deployment Status" (set to "Deployed"). At the bottom right, there are "Edit" and "Delete" buttons.



The screenshot shows the Salesforce Setup interface with the URL [drmrggovtartsciencecollege-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003jqW5/FieldsAndRelationships/page?address=...](https://drmrggovtartsciencecollege-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003jqW5/FieldsAndRelationships/page?address=...). The page title is "Semester". The main content area displays the "Fields & Relationships" tab for the "Semester" object. On the left sidebar, there are links for "Details", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", and "Object Limits". The main section shows a custom field named "Semester Name" with the API name "Semester\_Name\_\_c". It includes sections for "Field Information" (Field Label: "Semester Name", Field Name: "Semester\_Name", API Name: "Semester\_Name\_\_c", Description: "Help Text", Help Text: "Data Owner", Data Owner: "Field Usage", Field Usage: "Data Sensitivity Level") and "Object Information" (Object Name: "Semester", Data Type: "Date"). There are also buttons for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?". A "Validation Rules [0]" link is also present.







Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

## Milestone 2: Fields and Relationship

This screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options for the 'Semester' object. The main 'Details' tab is selected, displaying the following information:

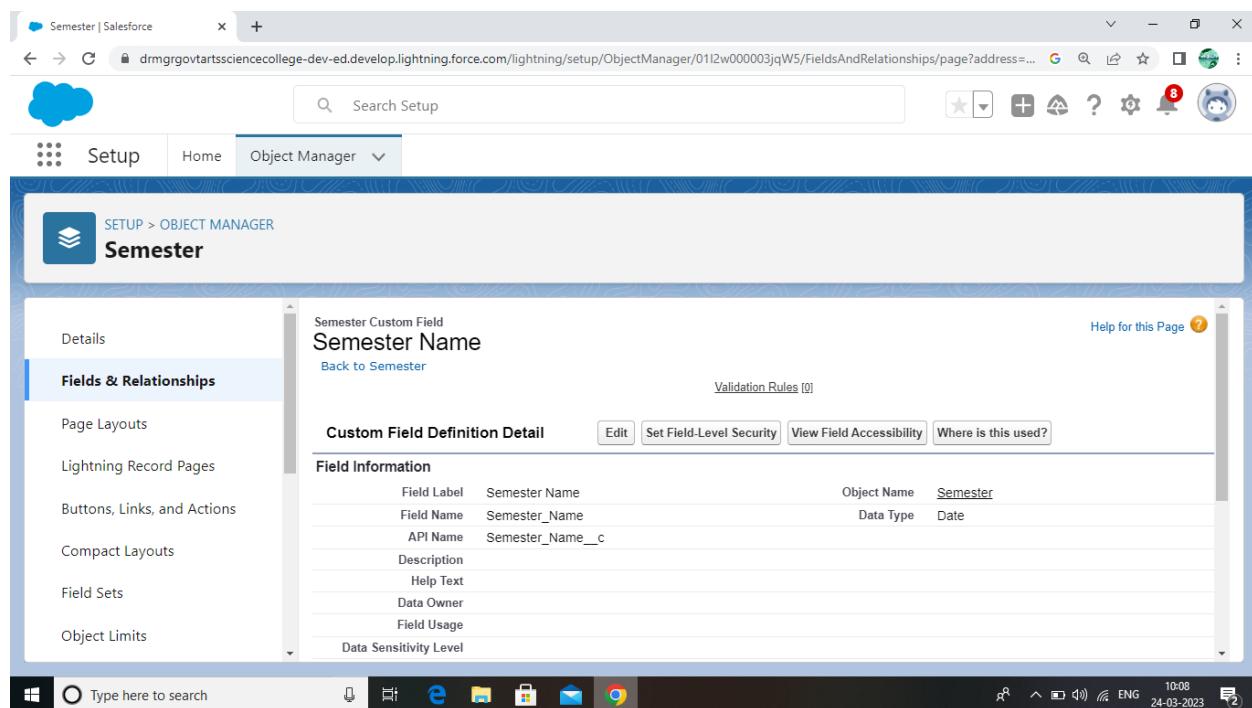
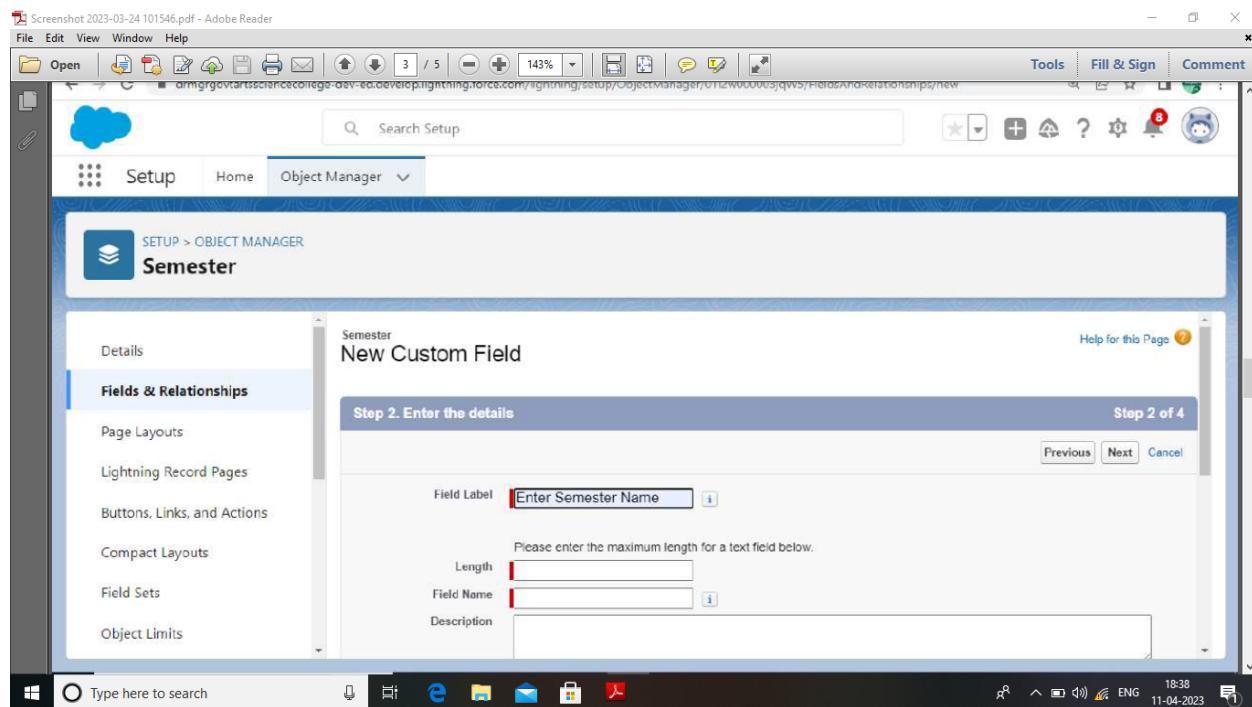
Field	Value
Description	
API Name	Semester_c
Custom	✓
Singular Label	Semester
Plural Label	Semesters
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed

The status bar at the bottom indicates the date as 24-03-2023.

This screenshot shows the process of creating a new custom field for the 'Semester' object. The 'Fields & Relationships' tab is selected in the sidebar. The main area displays the 'New Custom Field' wizard, Step 1: Choose the field type. The 'Data Type' section shows two options:

- None Selected
- Auto Number

A note below the 'Auto Number' option states: "A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record." The status bar at the bottom indicates the date as 11-04-2023.

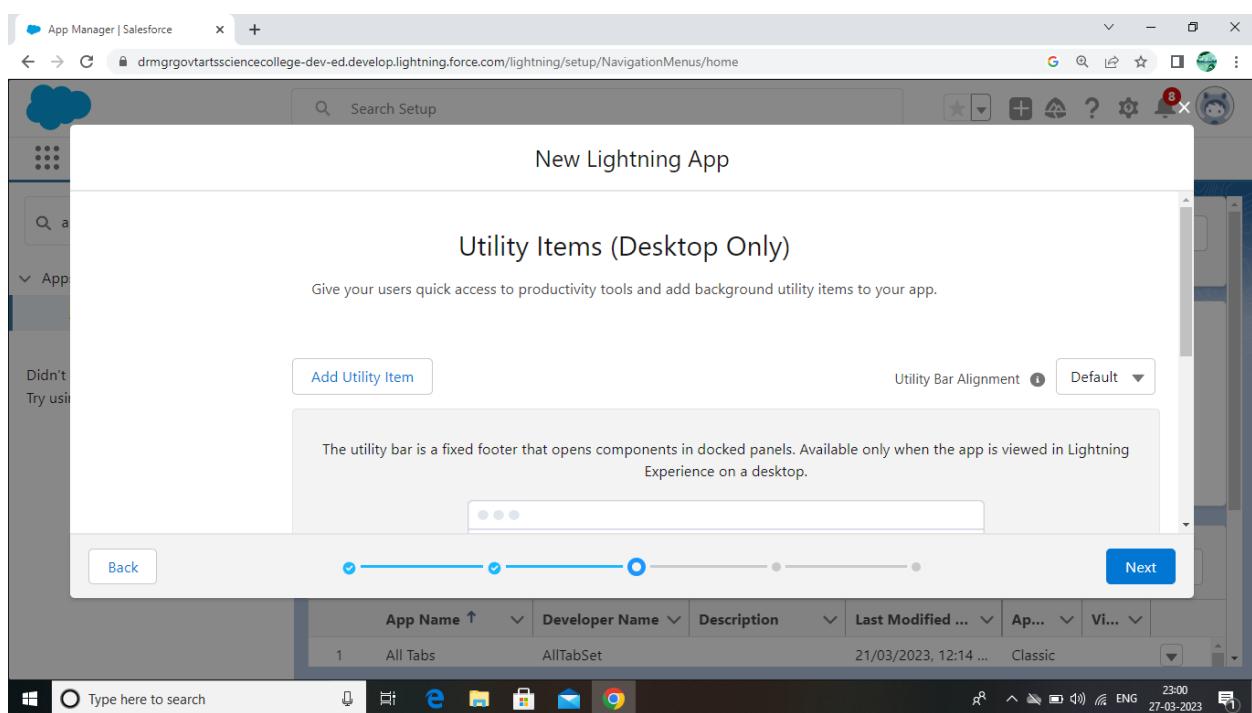
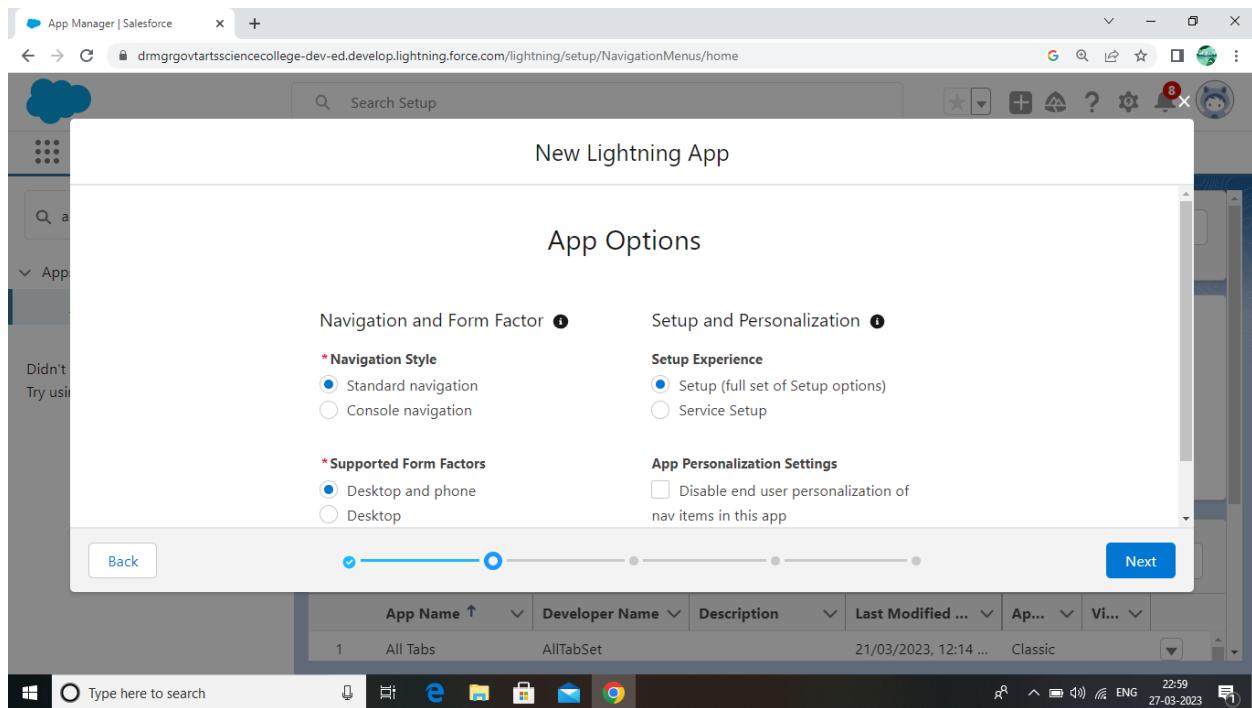


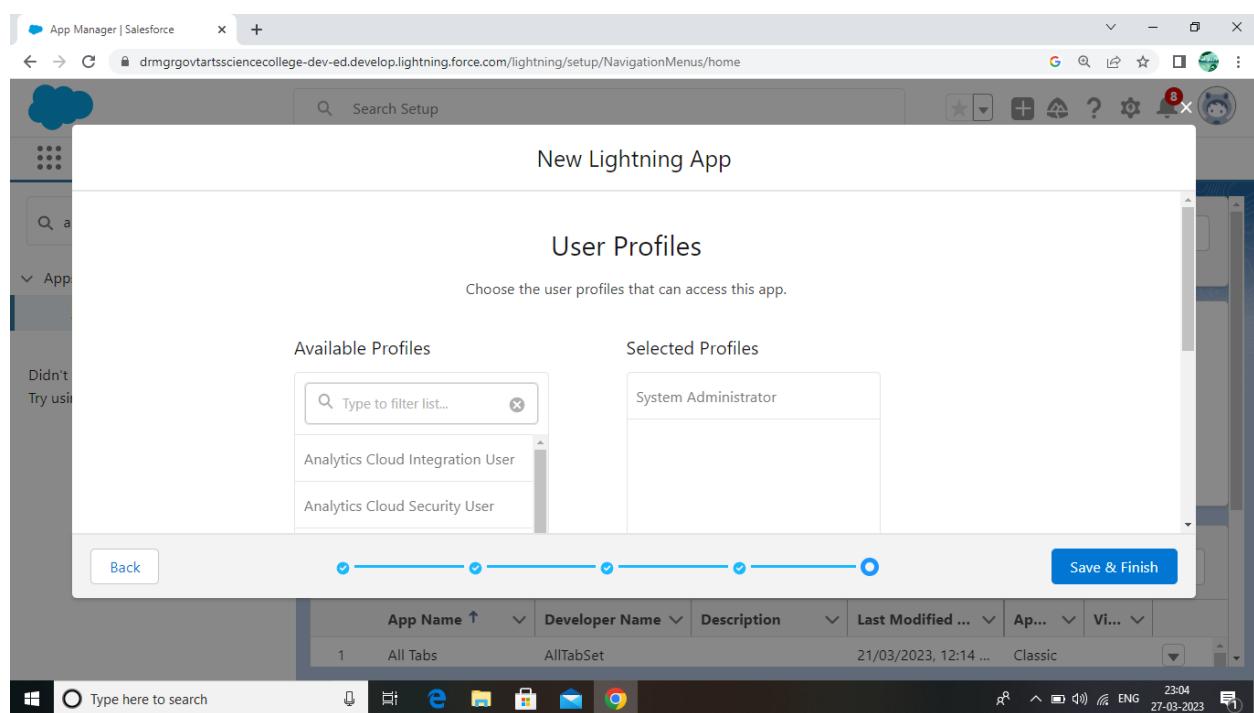
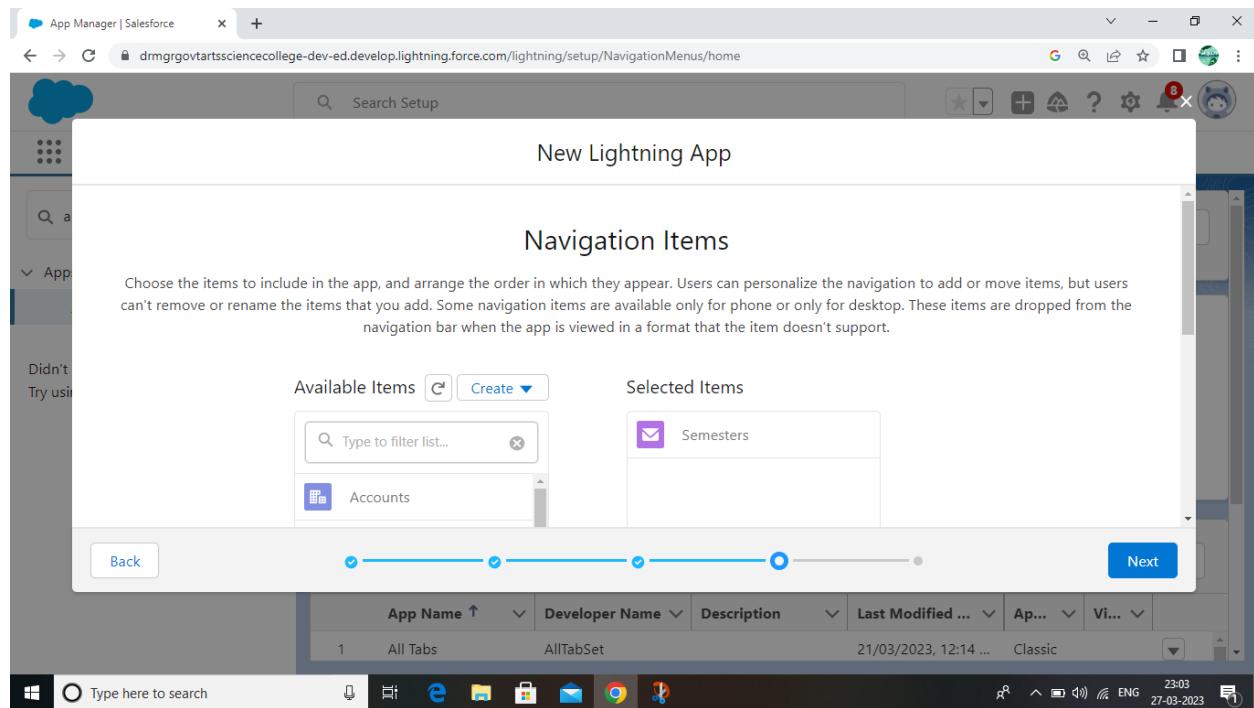
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Semester' object details. On the left, a sidebar lists options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', and 'Object Limits'. The 'Fields & Relationships' tab is selected. The right side shows sections for 'General Options' (with 'Required' checked) and 'Validation Rules' (which are currently empty). At the bottom, there are buttons for 'Back To Top' and 'Always show me more records per related list'. The status bar at the bottom indicates it's 10:09 on 24-03-2023.

An object relationship in salesforce is a two- way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

### Milestone 3: Lighting App

The screenshot shows the Salesforce App Manager interface. The top navigation bar includes tabs for 'Home | Salesforce' and 'App Manager | Salesforce'. The main content area displays a 'New Lightning App' dialog. The dialog has two main sections: 'App Details' and 'App Branding'. In 'App Details', the 'App Name' field is set to 'Candidate Internal Result Card'. In 'App Branding', the 'Primary Color Hex Value' is set to '#0070D2'. Below the dialog, a table lists app details such as 'App Name', 'Developer Name', 'Description', 'Last Modified ...', 'Ap...', 'Vi...', and 'Actions'. The status bar at the bottom indicates it's 10:26 on 24-03-2023.





The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main content area displays the 'System Administrator' profile. It includes a list of permissions and record types available to users with this profile. Below this, the 'Profile Detail' section shows the profile's name, user license, creation date, and last modified date.

Profile: System Administrator

Permissions:

- Login IP Ranges (0)
- Enabled Apex Class Access (0)
- Enabled Visualforce Page Access (0)
- Enabled External Data Source Access (0)
- Enabled Named Credential Access (0)
- Enabled Custom Metadata Type Access (0)
- Enabled Custom Setting Definitions Access (0)
- Enabled Flow Access (0)
- Enabled Service Presence Status Access (0)
- Enabled Custom Permissions (0)

Profile Detail

Name	User License	Custom Profile
System Administrator	Salesforce	Custom Profile
Created By: Sangeetha R.	21/03/2023, 12:14 pm	Modified By: Sangeetha R.
		22/03/2023, 12:41 pm

The screenshot shows the Lightning App Builder interface with the 'App Details & Branding' tab selected. The page allows users to configure the app's name, developer name, description, and branding options like the primary color hex value.

App Details & Branding

App Details

- \* App Name: Candidate Internal Result Card
- \* Developer Name: Candidate\_Internal\_Result\_Card
- Description: Enter a description...

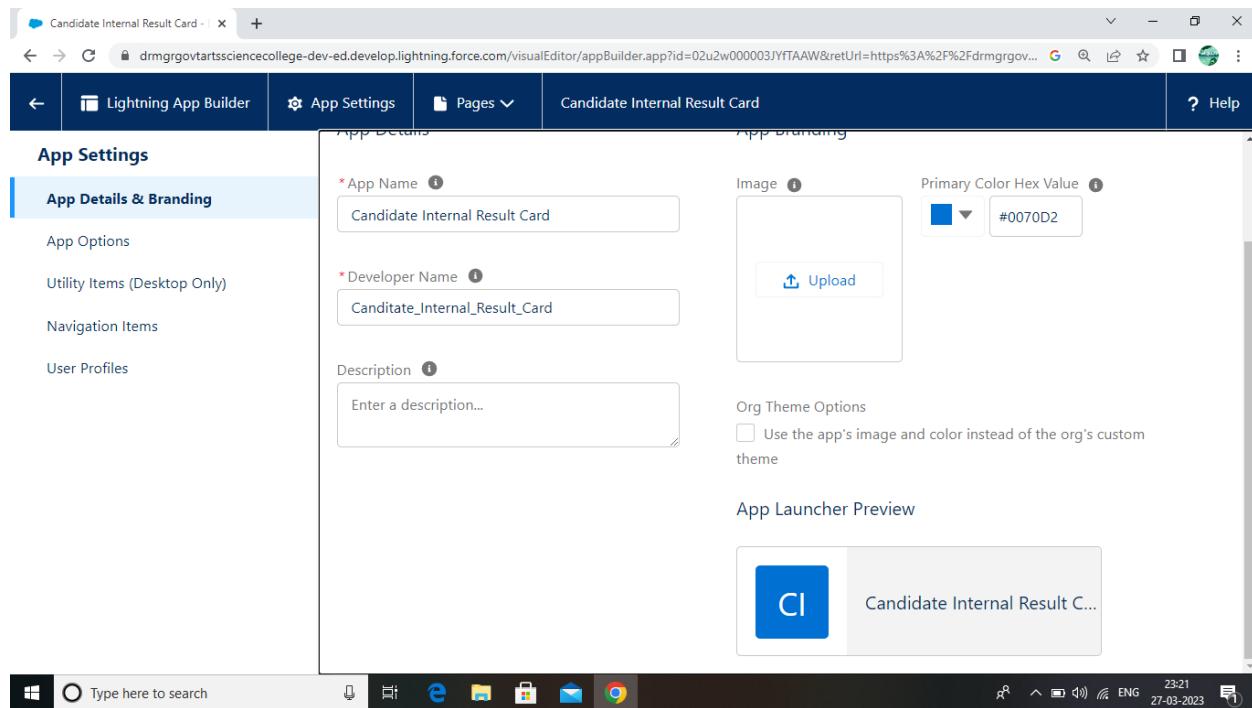
App Branding

- Image:  Upload
- Primary Color Hex Value: #0070D2

Org Theme Options

- Use the app's image and color instead of the org's custom theme

App Launcher Preview



Apps in salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

## Milestone 4: Users

### Creating a users :

The screenshot shows the Salesforce Setup interface with the title bar "Users | Salesforce". The left sidebar under "Setup" has "Users" selected. The main area shows the "Users" setup page with the heading "All Users". It displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains three rows:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rpufdea3.5jz3suzrsrlt@chatter.salesforce.com	✓	Chatter Free User	
Edit	R. Sangeetha	SR	sangeetha@mrgcollege.com	✓	System Administrator	
Edit	User Integration	integ	integration@00d2w00000rpufdea3.com	✓	Analytics Cloud Integration User	

Salesforce Setup - Users

User Sangeetha R Sangeetha R

User Detail

Name	Sangeetha R Sangeetha R	Role
Alias	ssang	User License
Email	sangeethara58@gmail.com	Profile
Username	sangeethara58@gmail.com	Active
Nickname	User16799854968458318524	Marketing User
Title		Offline User
Company		Knowledge User

Prospector Users

Type here to search

Windows Taskbar: 03:18, 28-03-2023

Salesforce Setup - Users

User Sangeetha R Sangeetha R

User Detail

Title	Offline User	
Company	Knowledge User	
Department	Flow User	
Division	Service Cloud User	
Address	Site.com Contributor User	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on

Prospector Users

Type here to search

Windows Taskbar: 03:19, 28-03-2023

Salesforce Setup - Users

Search Setup

Setup Home Object Manager

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
**Users**  
Feature Settings  
Data.com  
Prospector Users

SETUP Users

Request Emails

Federation ID	High-Contrast Palette on Charts
App Registration: One-Time Password Authenticator	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<input checked="" type="checkbox"/>
Lightning Login	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate] <input type="button" value="i"/>
Allow Forecasting	
<input type="checkbox"/>	
Call Center	
Phone	
Extension	
Fax	

03:20 28-03-2023

Salesforce Setup - Users

Search Setup

Setup Home Object Manager

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
**Users**  
Feature Settings  
Data.com  
Prospector Users

SETUP Users

Extension	Fax
Mobile	<input type="checkbox"/>
Email Encoding	Unicode (UTF-8)
Employee Number	
Used Data Space	0 B [View]
Used File Space	0 B [View]
Last Login	
Last Password Change or Reset	28/03/2023, 12:20 pm
Failed Login Attempts	0 <input type="button" value="i"/>
Individual	
Created By	Sangeetha R, 28/03/2023, 12:20 pm
Modified By	Sangeetha R, 28/03/2023, 12:20 pm

Created By: Sangeetha R, 28/03/2023, 12:20 pm

Modified By: Sangeetha R, 28/03/2023, 12:20 pm

Edit Sharing Reset Password Freeze

03:20 28-03-2023

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** The title bar displays "Users | Salesforce" and the URL "drmgrgovtartsciencecollege-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GQW4yAAH%3Fnoredirect%...".
- Top Navigation:** The top navigation bar includes icons for Home, Object Manager, and a search bar labeled "Search Setup".
- Left Sidebar:** The sidebar is titled "Users" and contains the following items:
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
  - Users** (selected)
  - Feature Settings
  - Data.com
- Right Content Area:** The main content area is titled "SETUP Users" and displays four sections:
  - Permission Set Assignments:** Subtitle "Activation Required". Buttons: "Edit Assignments" and "Permission Set Assignments Help". Message: "No records to display".
  - Permission Set Group Assignments:** Subtitle "Activation Required". Buttons: "Edit Assignments" and "Permission Set Group Assignments Help". Message: "No records to display".
  - Permission Set License Assignments:** Subtitle "Activation Required". Buttons: "Edit Assignments" and "Permission Set License Assignments Help". Message: "No records to display".
- System Bar:** The bottom bar includes icons for File, Home, Object Manager, and a search bar labeled "Type here to search". It also shows system status: 03:21, ENG, 28-03-2023.

This screenshot is nearly identical to the one above, showing the Salesforce Setup interface with the "Users" section selected in the sidebar. The main content area displays the following sections:

- Personal Groups:** Subtitle "New Group". Buttons: "Personal Groups Help" and "New Group". Message: "No personal groups specified".
- Public Group Membership:** Subtitle "New Group". Buttons: "Public Group Membership Help" and "New Group". Message: "No records to display".
- Queue Membership:** Subtitle "New Queue". Buttons: "Queue Membership Help" and "New Queue". Message: "No records to display".
- Team:** Subtitle "New Team". Buttons: "Team Help" and "New Team". Message: "No records to display".

The system bar at the bottom shows the same information as the first screenshot: 03:21, ENG, 28-03-2023.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar has 'Users' expanded, showing sub-options like Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and another 'Users' option which is currently selected. The main content area displays several sections: 'Managers in the Role Hierarchy' (No records to display), 'OAuth Connected Apps' (No approved access tokens), 'Third-Party Account Links' (This account is not authorized for access from any third-party accounts), and 'Installed Mobile Apps' (No records to display). At the bottom, there's a section for 'Authentication Settings for External Systems' with a 'New' button and a link to 'Authentication Settings for External Systems Help'. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager', along with a search bar and various system icons.

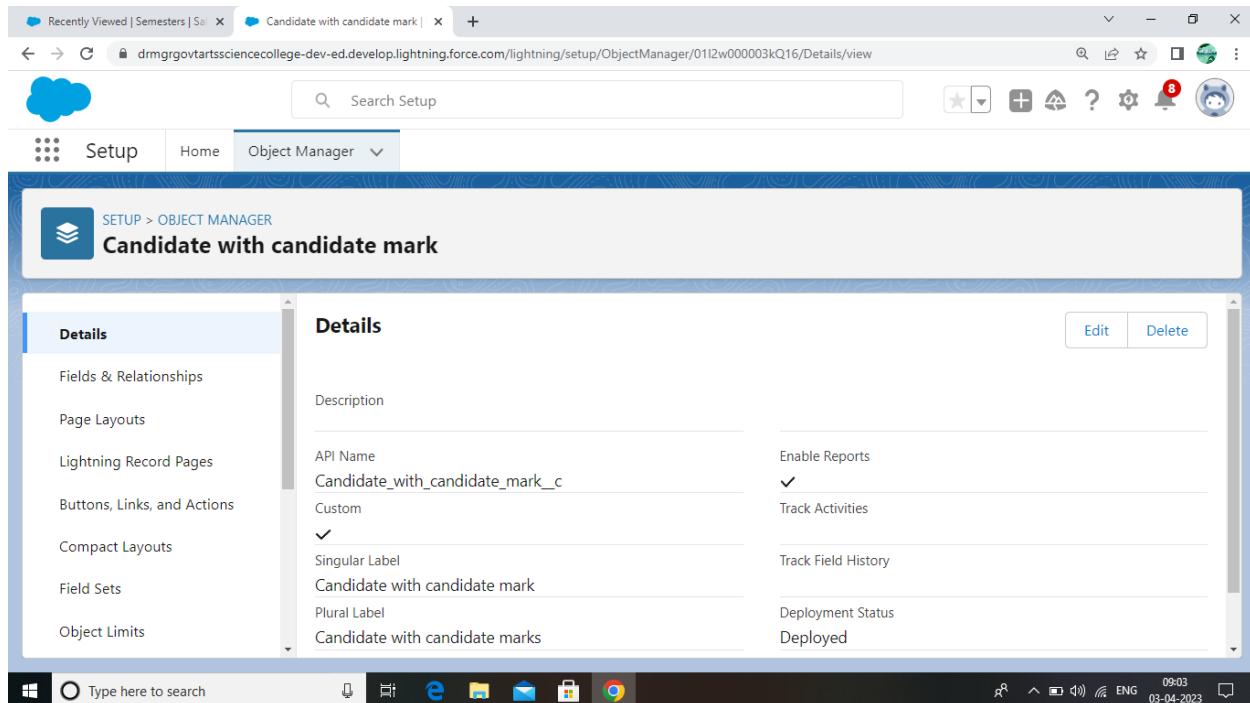
This screenshot of the Salesforce Setup interface shows the 'Users' page with a different set of sections visible. The left sidebar is identical to the first screenshot. The main content area now includes: 'Authentication Settings for External Systems' (No records to display), 'Login History' (There is no login history available, with a link to download logins from outside the website), and 'User Provisioning Accounts' (No records to display). A 'Back To Top' link is at the bottom of the page. The status bar at the bottom right shows the time as 03:22 and the date as 28-03-2023.

A user is anyone who logs in to salesforce. Users are employees at your company such as sales reps, managers, and IT specialists, who need access to the company records. Every user in salesforce has a user account.

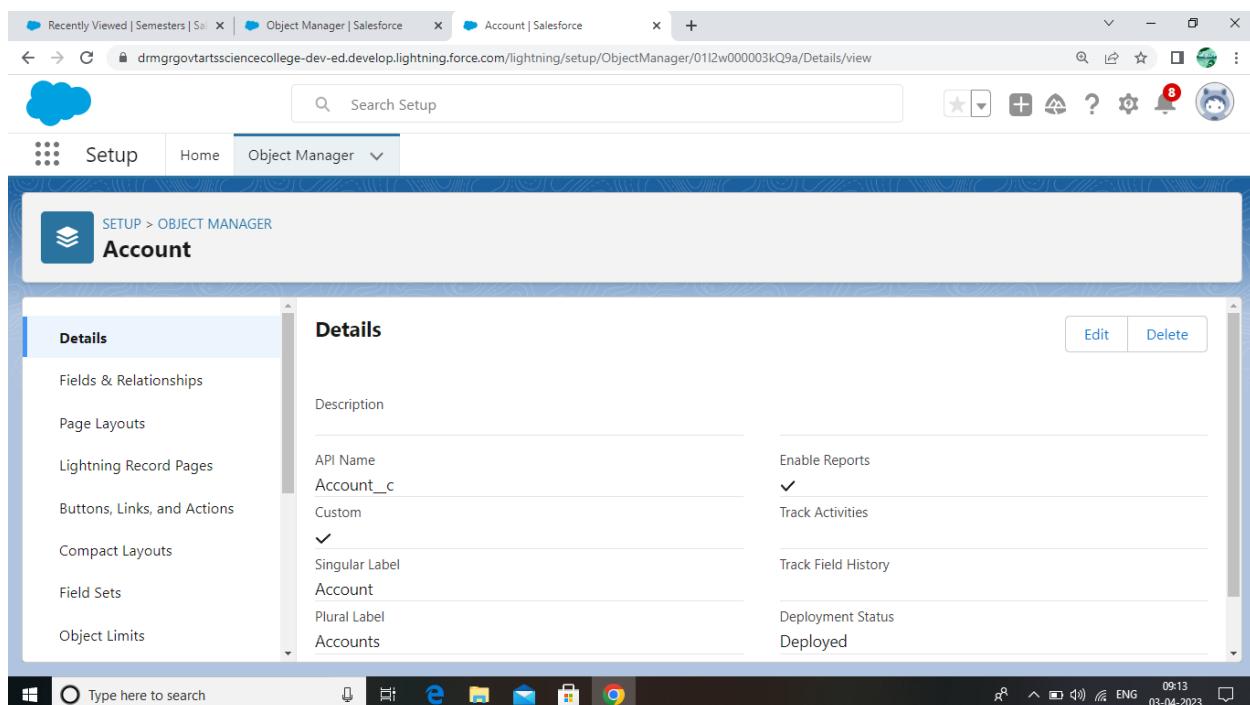
## Milestone 5: Reports

### Activity 1:

#### Reports and dashboards:



The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various object settings: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main pane displays the 'Details' for the 'Candidate with candidate mark' object. The API Name is set to 'Candidate\_with\_candidate\_mark\_\_c'. Under the 'Custom' section, the Singular Label is 'Candidate with candidate mark' and the Plural Label is 'Candidate with candidate marks'. On the right, configuration options include 'Enable Reports' (checked), 'Track Activities', 'Track Field History', and 'Deployment Status' (set to 'Deployed'). The top navigation bar shows tabs for Recently Viewed, Semesters, Candidate with candidate mark, and a plus sign. The status bar at the bottom indicates it's 09:03 on 03-04-2023.



The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various object settings: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main pane displays the 'Details' for the 'Account' object. The API Name is set to 'Account\_\_c'. Under the 'Custom' section, the Singular Label is 'Account' and the Plural Label is 'Accounts'. On the right, configuration options include 'Enable Reports' (unchecked), 'Track Activities', 'Track Field History', and 'Deployment Status' (set to 'Deployed'). The top navigation bar shows tabs for Recently Viewed, Semesters, Object Manager (Salesforce selected), and a plus sign. The status bar at the bottom indicates it's 09:13 on 03-04-2023.

The screenshot shows the Salesforce Report Builder interface. At the top, there are tabs for 'Recently Viewed | Semesters | Sales', 'Object Manager | Salesforce', and 'Report Builder | Salesforce'. Below the tabs, the URL is <https://drmrggovtartsciencecollege-dev-ed.lightning.force.com/one/one.app#eyjb21wb25lbnREZWYiOjlyZXBvcnRzOnJlcG9ydEJ1aWxkZXliLCJhdHRyaWJ1dGVzIj...>. The main title is 'Candidate Internal ...'. The navigation bar includes 'Semesters', 'Reports', and 'Reports'. The main content area is titled 'Create Report' and contains a sidebar for 'Category' (Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports) and a central panel for 'Select a Report Type' with a search bar and a list of report types: Accounts, Contacts & Accounts, and Accounts with Partners. To the right, there is a 'Details' section for 'Accounts' with a 'Start Report' button and a 'Details' link. The taskbar at the bottom shows icons for File, Home, Recent, and others.

The screenshot shows the Salesforce Reports page. The URL is <https://drmrggovtartsciencecollege-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru>. The main title is 'Candidate Internal ...'. The navigation bar includes 'Semesters' and 'Reports'. The left sidebar lists categories: Reports, Recent (2 items), Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, and Created by Me. The central content area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, and Created On. The table shows two entries: 'Accounts' (Private Reports, Sangeetha R, 3/4/2023, 9:47 pm) and 'candidate' (candidate Marks, Private Reports, Sangeetha R, 29/3/2023, 11:57 am). The taskbar at the bottom shows icons for File, Home, Recent, and others.

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

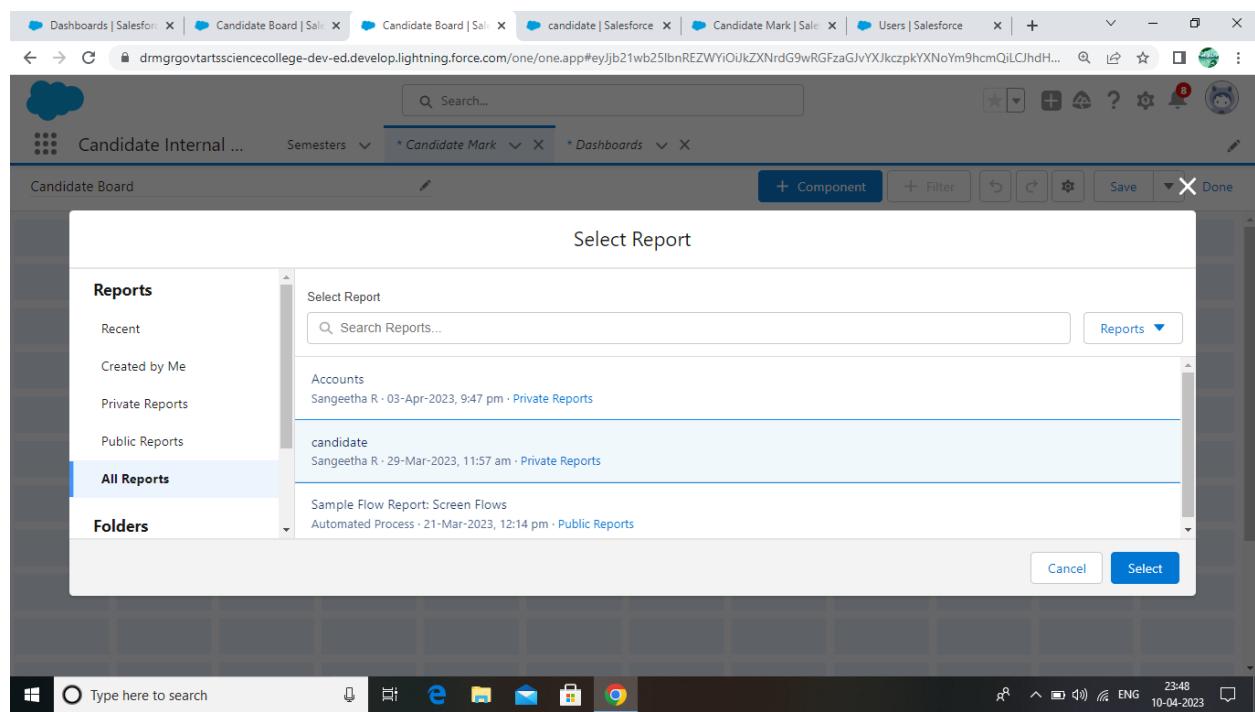
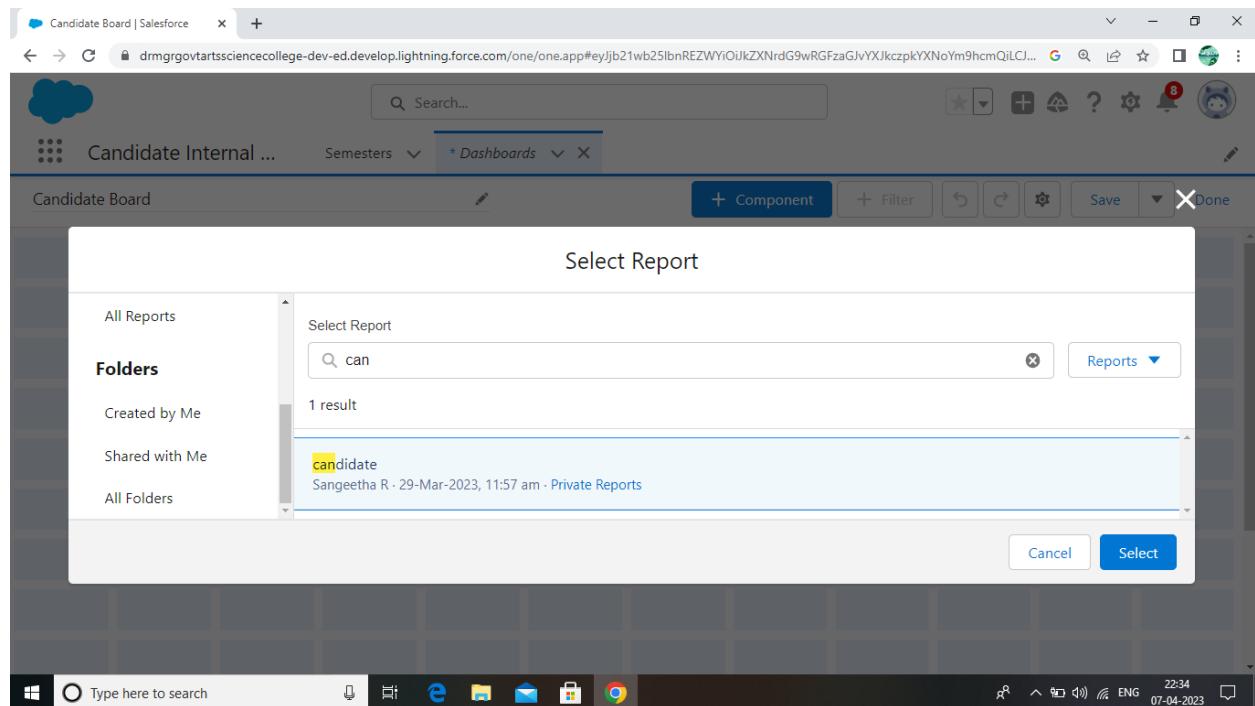
## Milestone 6: Dashboards:

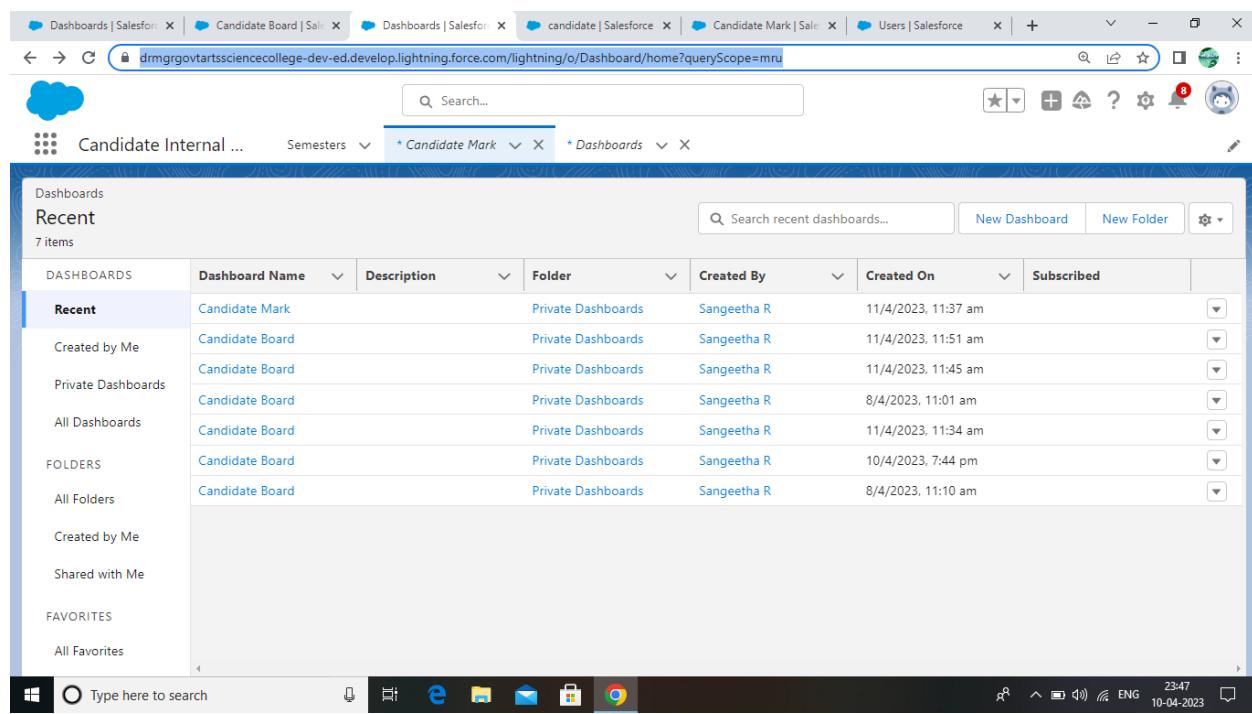
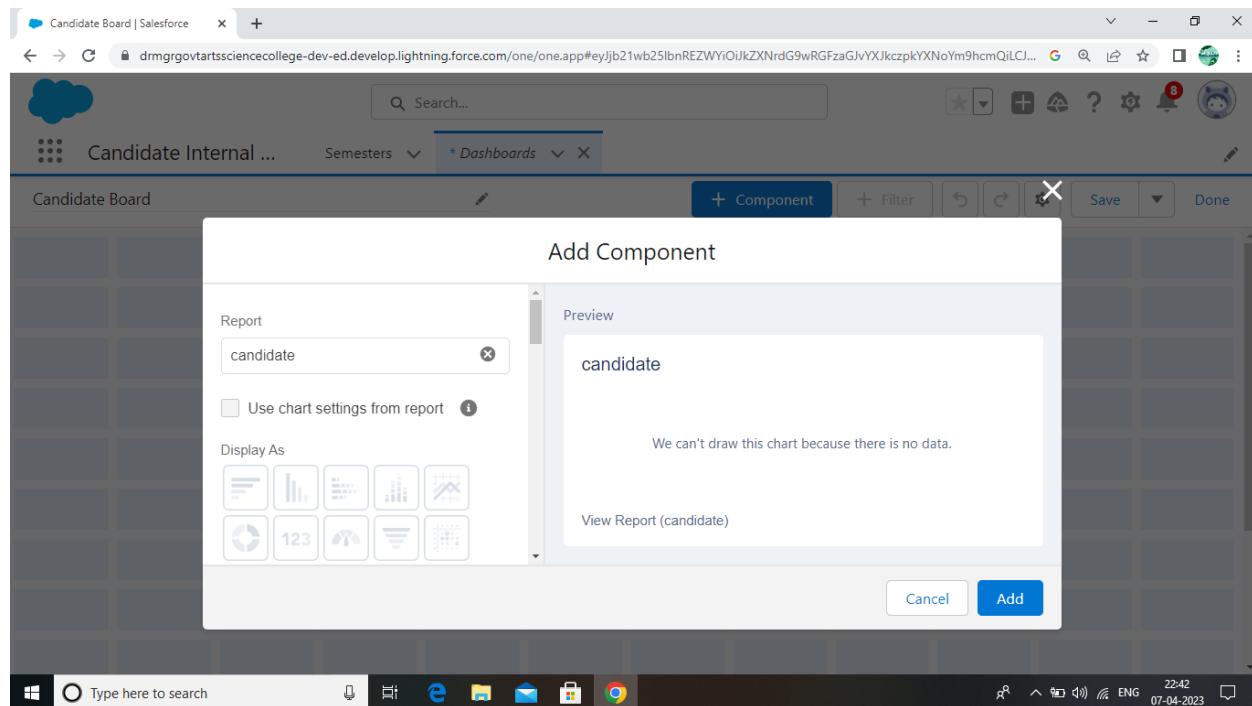
### Activity 1:

Create a dashboard:

The screenshot shows the Salesforce Lightning interface. The top navigation bar has several tabs: 'Dashboards | Salesforce', 'Candidate Board | Sales...', 'Candidate Board | Sales...', 'candidate | Salesforce', 'Candidate Mark | Sales...', 'Users | Salesforce', and '+'. Below the navigation is a search bar and a toolbar with icons for star, plus, question mark, gear, refresh, and others. The main area is titled 'Candidate Internal ...' and shows a grid-based dashboard editor. At the top of the editor are buttons for '+ Component', '+ Filter', and other dashboard management tools. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

The screenshot shows the Salesforce Lightning interface with a modal dialog open. The title of the dialog is 'New Dashboard'. Inside the dialog, there are three input fields: 'Name' (containing 'Candidate Board'), 'Description' (empty), and 'Folder' (empty). At the bottom right of the dialog are 'Cancel' and 'Create' buttons. The background shows the same dashboard editor as the previous screenshot, with the 'Candidate Internal ...' tab selected. The bottom of the screen shows the Windows taskbar and system tray.





In the dashboards let data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

#### 4. Trailhead profile public URL

Team Lead -<https://trailblazer.me/id/sangr77>

Team Member 1 -<https://trailblazer.me/id/ssangeetha24>

Team Member 2 -<https://trailblazer.me/id/skumar9235>

Team Member 3 -<http://trailblazer.me/id/sandhiyak50>

#### 5. ADVANTAGES & DISADVANTAGES:

Develop and maintain new digital channels, attract new prospects, namely visitors to your site, convert these prospects into customers and maximise revenue, retain customers and establish a long-term relationship of trust.

Data organized and presented by a CRM platform leads to a better understanding of customers. This leads to better messaging and outreach, much of which can be done with automation, which helps you offer better, more efficient customer service. Furthermore, your teams can collaborate more easily and reduce siloes.

Customer service agents can dedicate their time to working with customers who have questions, problems, or more complex needs. Ultimately, an efficient company can better serve its customers that's the greatest benefit of CRM software.

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 the CRM implementation.

Impacts on loyalty and confidence may lead customers to look elsewhere. This may be the case if they directly experience poor quality care. In industries such as healthcare, for example, bad data could result in long waiting times.

Staff over reliance on CRM may diminish customer loyalty through a bad experience.

The excess initial time and productivity cost of implementation.

## 6. APPLICATIONS:

Administrator should be able to create all base data including semester, candidate, course and lecturer, lecturer should have the ability to create internal results, dean, who is one of the lecturer, should be the only one with ability to update internal results, re-evaluation can be initialized by candidate for all internal results. Now only dean can update the marks after re-evaluation.

Customer relationship management CRM is a set of integrated, data-driven software solutions that help manage, track, and store information related to your company's current and potential customers.

CRM stands for customer relationship management and is a software system that helps business owners easily track all communications and nurture relationships with their leads and clients. A CRM replaces the multitude of spreadsheets, databases and apps that many businesses patch together to track client data.

## 7. CONCLUSION:

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and those ensure long term customer loyalty.

The concept of Customer Relationship Management is evolving and is providing sample scope for many other developments in an industry to take place. Over recent past, the researches and practice of CRM has led to many discoveries of concepts and theories already discussed. The Customer Relationship Management has now become customer experience Management. The customers have now been evaluated on the basis of not just immediate profitability but all the future profits they may come with in due course by calculating their lifetime value for the organization.

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:

CRM is predicted to become more powerful to support customer first, not company first businesses. Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by and mobile capabilities.

The future of CRM is bright. CRM will continue to report key data and give insight for future action, however, leading experts see CRM evolving to measure and inform sales enablement and customer engagement while playing a tremendous role in the success of future business.

CRM takes a holistic view of the customer by trying to understand the total value of each customer over their entire life rather than on a transaction by transaction basis. This allows businesses to serve the customer better and maximise profitability through increased loyalty.

CRM software is a great way to track employee activity and performance. Choose software that gives employees their own accounts where they can individually track their hours, tasks, meetings, sales numbers, goals and other items.