# Project report

## 1.Introduction

### 1.1 overview

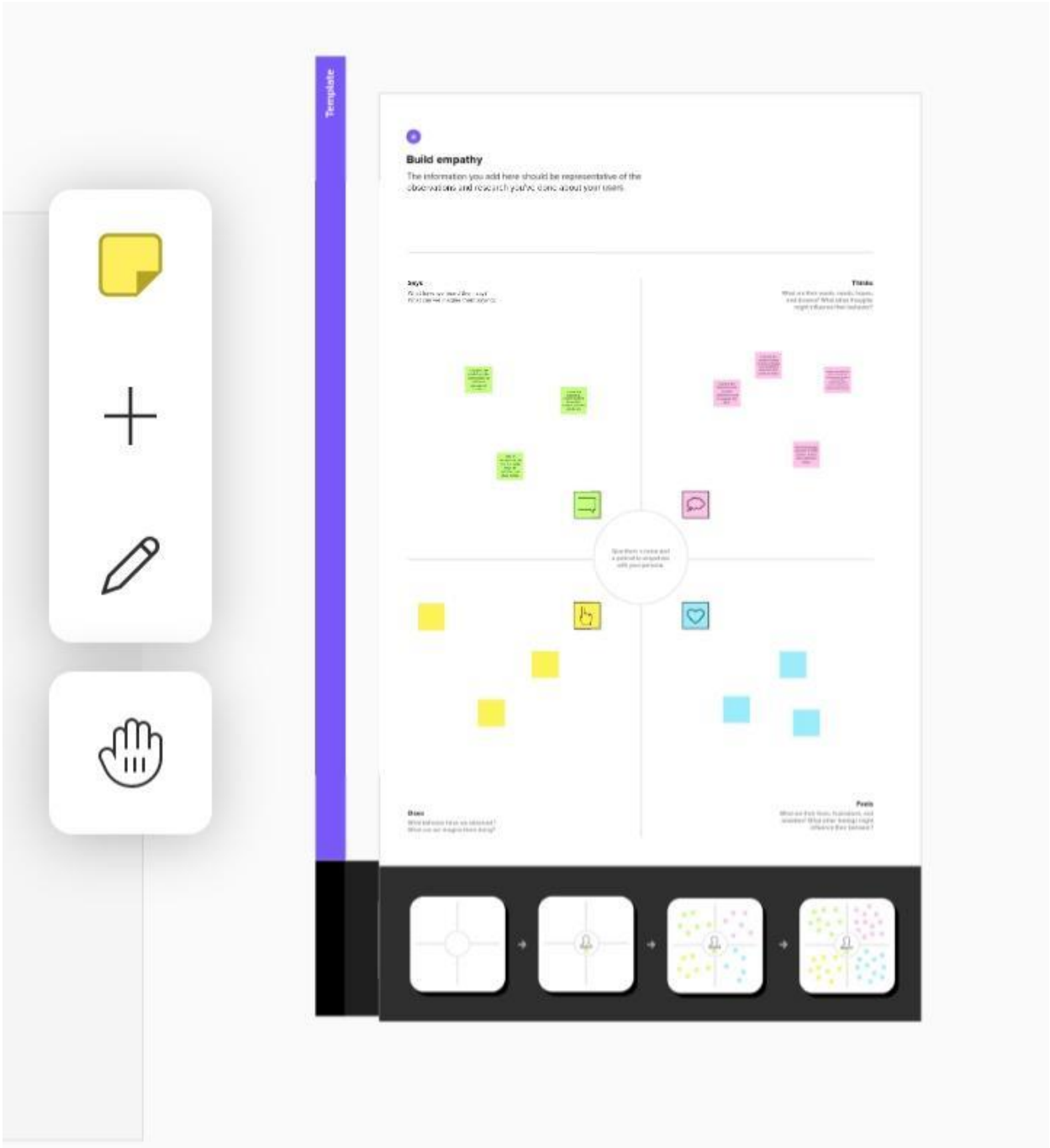
Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.

### 1.2 ***purpose***

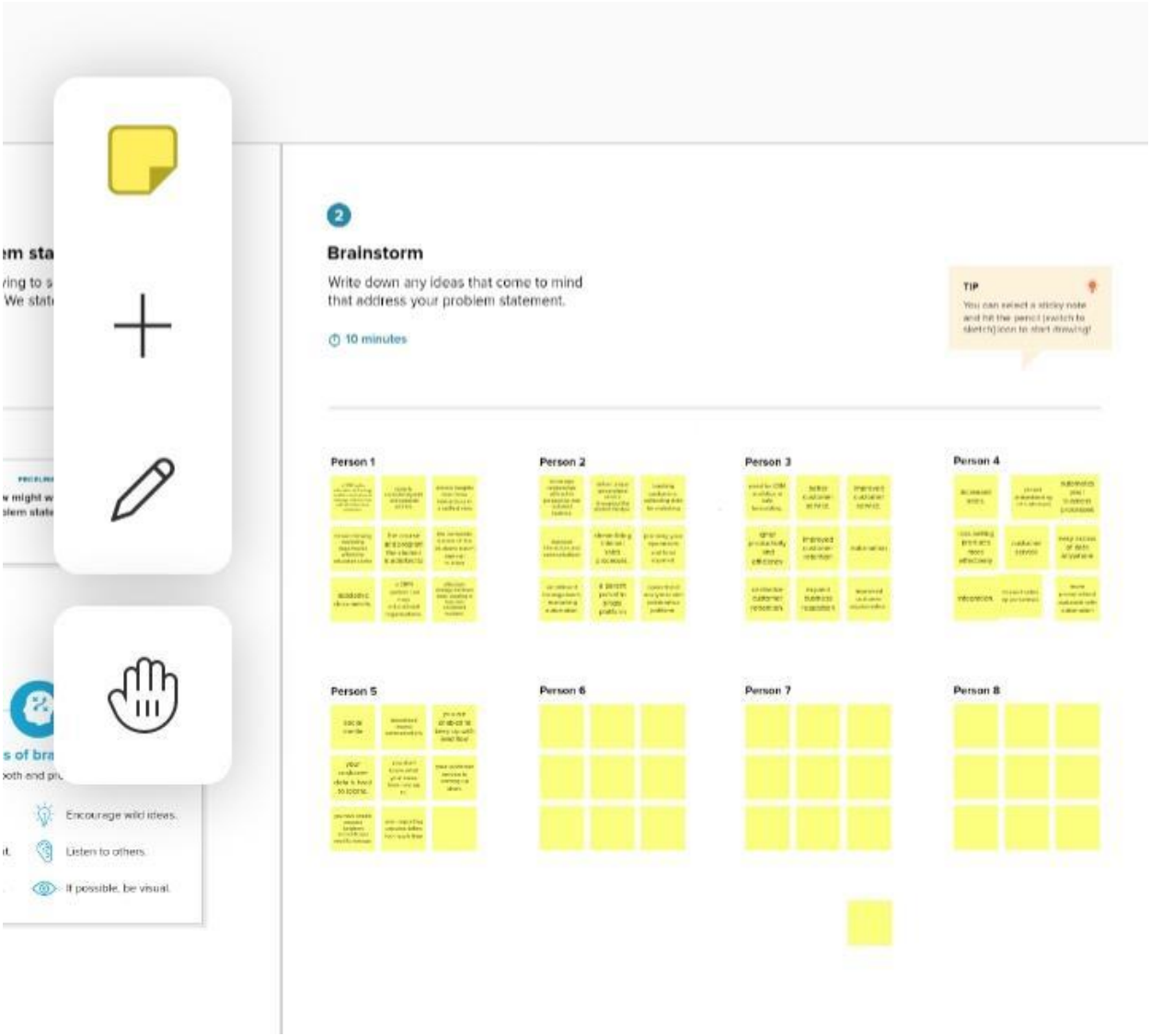
CRM software lets you store customer and prospect contact information, identify sales opportunities, record service issues, and manage marketing campaigns, all in one central location — and make information about every customer interaction available to anyone at your company who might need it. The ultimate goal of customer relationship management (CRM) software is to personalize individual customer experiences at every point along their journey from prospect to repeat buyer, increasing brand loyalty and the company's bottom

Another important aspect of the CRM spectrum is marketing automation, which enables your team to automate certain processes across different digital channels. While they are technically two different areas, CRM and marketing automation often intertwine, as they both serve to provide tools to help nurture leads down the funnel towards conversion.

2. **problem definition and design thinking  2.1 empathy map**



## 2.2idea thinking and brainstorming:



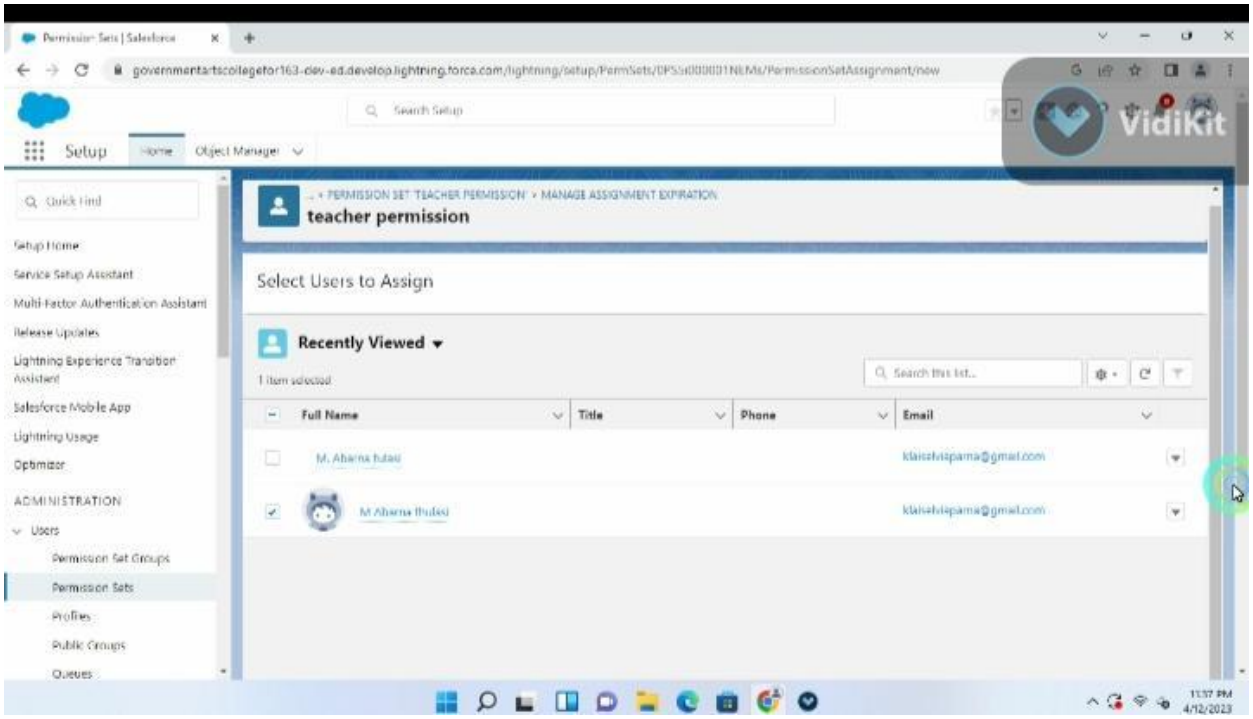

# 3. Result

## 3.1 Data model

| Object | Fields lable |
|---|---|

| | | | |
|---|---|---|---|
| School | | **Address** | **Text area** |
| | | District | Text area |
| | | State | Text area |
| | | School websites | Text area |
| Student | | Phone number | Phone |
| | | Number of students | Roll up summary |
| | | Highest mark | Roll up summary |
| | | Phone number | Phone |
| | | School | Master detail relationship |
| | | Result | Picklist |
| | | Class | Number |
| | | Marks | Number |
| | | Parent address | Text area |
| | | Parent number | Phone |
| | | | |

## Project Activities


Permission Sets | Salesforce
governmentartscollegefor163-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/DPSS000001NEMs/PermissionSetAssignment/new
Search Setup
Setup
Home
Object Manager
VidiKit
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
PERMISSION SET 'TEACHER PERMISSION' › MANAGE ASSIGNMENT EXPIRATION
teacher permission
Select Users to Assign
Recently Viewed
1 item selected
Search this list...
Full Name
Title
Phone
Email
M. Aharna tulasi
klaiselviapama@gmail.com
M Aharna thulasi
klaiselviapama@gmail.com
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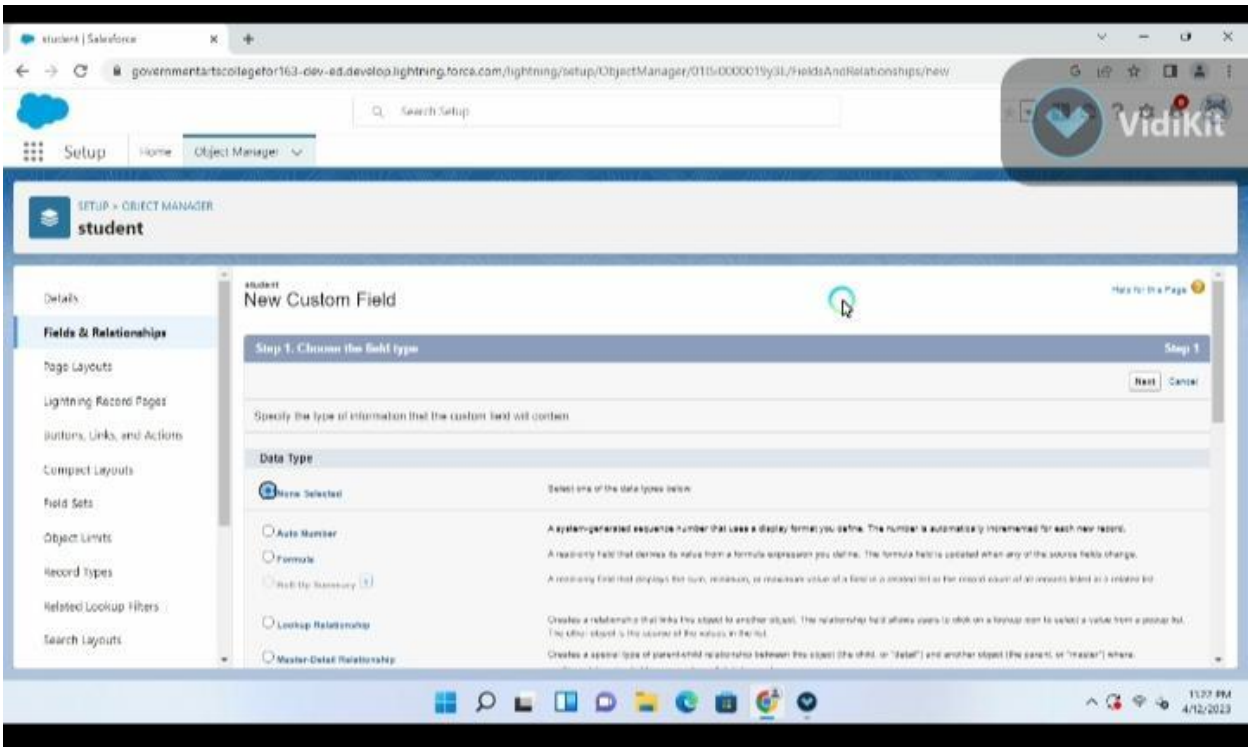
4/12/2023


student | Salesforce
governmentartscollegefor163-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IS000001Sy3L/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
VidiKit
SETUP › OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain
Data Type
None Selected
Select one of the data types below
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
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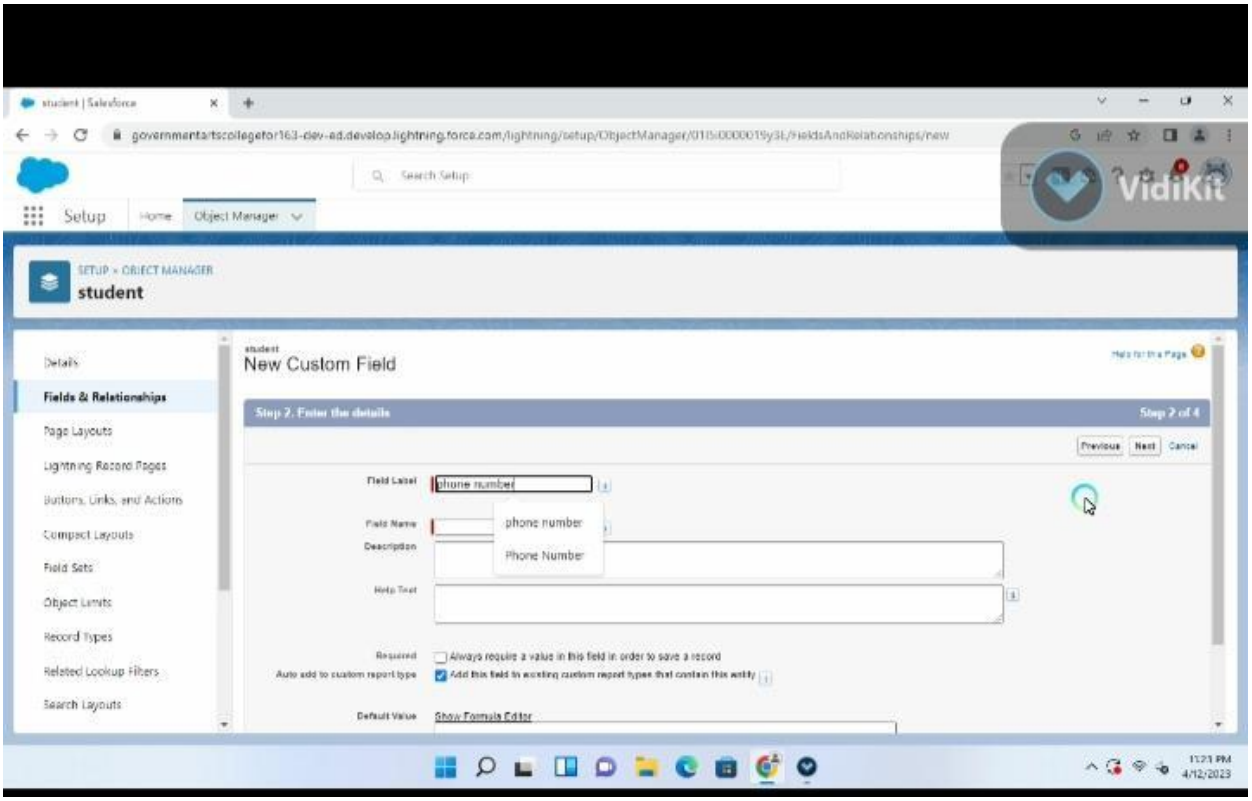
student | Salesforce
governmentartscollegefor163-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000001Sy3L/FieldsAndRelationships/new
Search Setup
VidiKit
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
student
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
phone number
Field Name
Description
Help Text
phone number
Phone Number
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
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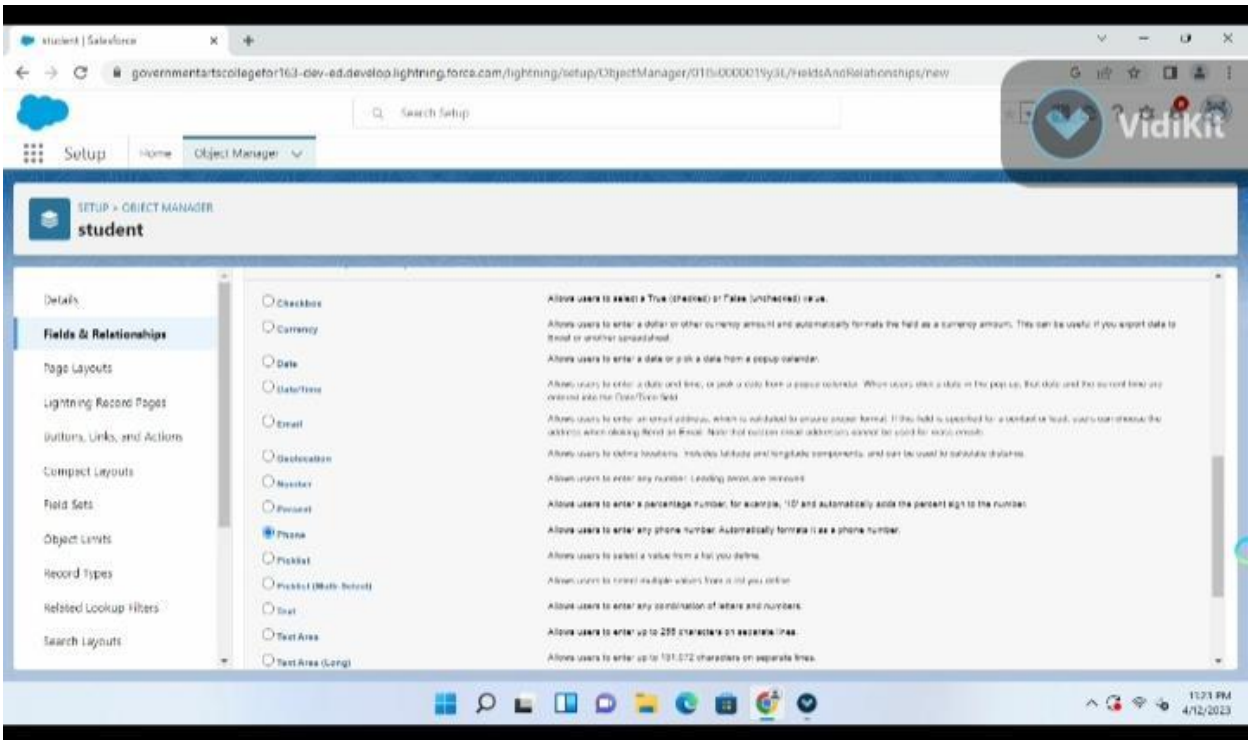


**Trailhead Profile public URL:**

Team leader: https://trailblazer.me/id/asoundari

Team member 1: https://trailblazer.me/id/akalaiselvi

Team member 2: https://trailblazer.me/id/gmani126

Team member 3: https://trailblazer.me/id/ggowsika1

Team leader 4: https://trailblazer.me/id/viveka33

## ADVANTAGES

- Automates processes.
- Streamlines the billing process.
- Supports professional development.
- Helps you recognise top employees or clients.
- Increases productivity.
- Job progress analysis.
- Team tracking.
- Syncing across devices

## 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.

## CONCLUSION

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 thus ensure long-term customer loyalty
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.

## FUTURE SCOPE

The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations. Companies like Tact.ai and Nimble on the sales side are solid examples.