

IMPLEMENTING CRM FOR RESULT TRACKING OF

CANDIDATES WITH INTERNAL MARK

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 throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth

They allow businesses to learn more about their target audiences and how to best cater for their needs, thus retaining customers and driving sales growth. CRM may be used with past, present or potential customers..

CRM stands for Customer Relationship Management, and it's a technology for managing and supporting customer relationships. CRM technology helps companies build and grow customer relationships across the entire customer lifecycle.

The beginnings of CRM as we know it started in the 1980s. Robert and Kate Kestnbaum were pioneers of database marketing. Which was a form of direct marketing that analysed the customer database statistically to identify which customers would be most likely to react to a marketing campaign?

The CRM cycle involves marketing, customer service and sales activities. It starts with outreach and customer acquisition and ideally leads to customer loyalty. There are five key stages in the CRM cycle: Reaching a potential customer. Customer acquisition

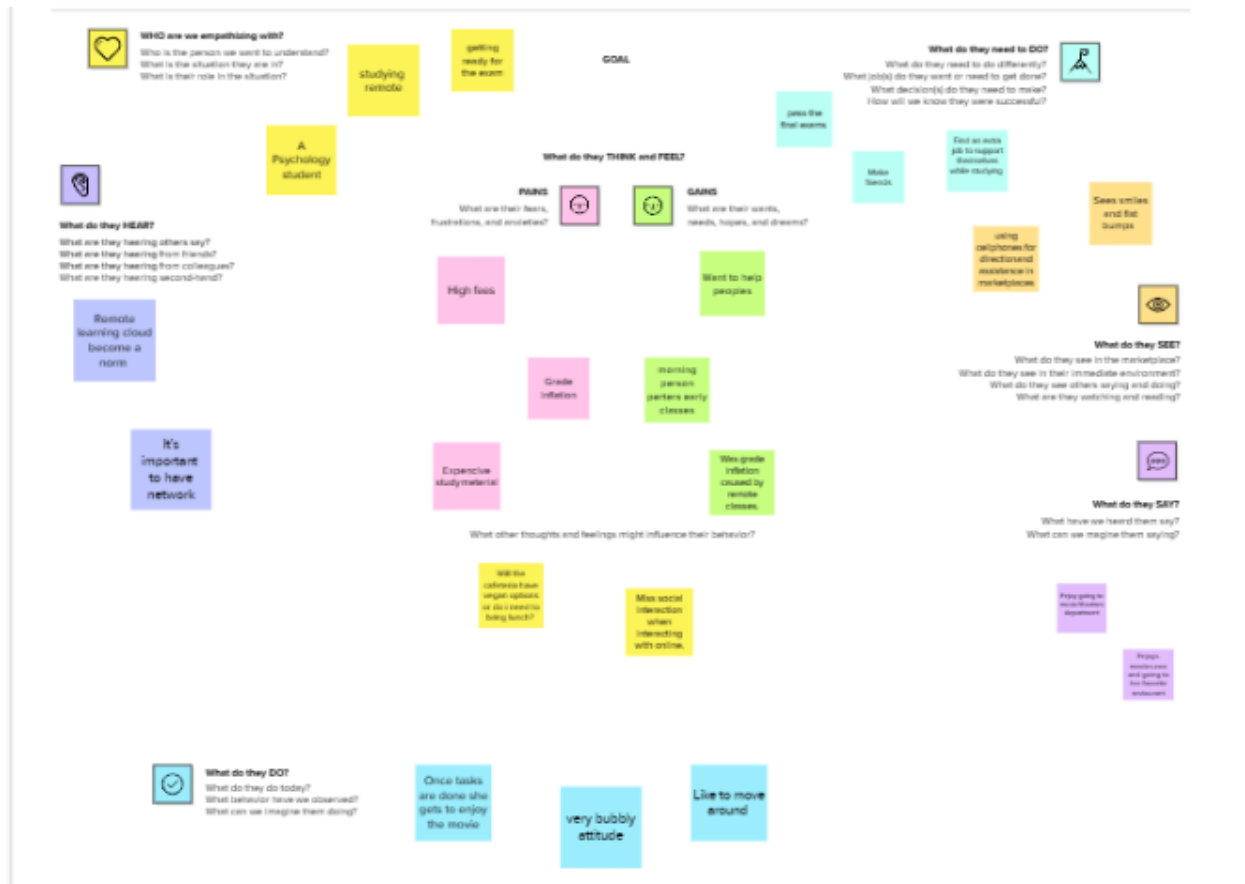
1.2.PURPOSE:

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

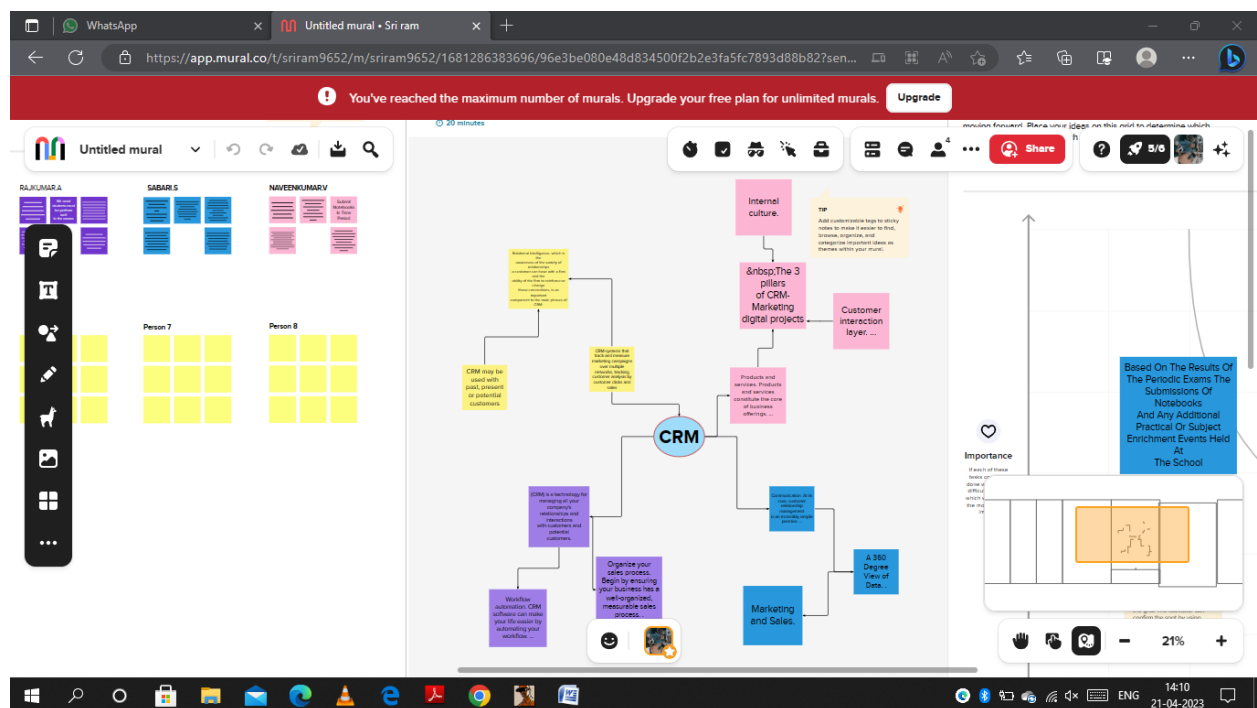
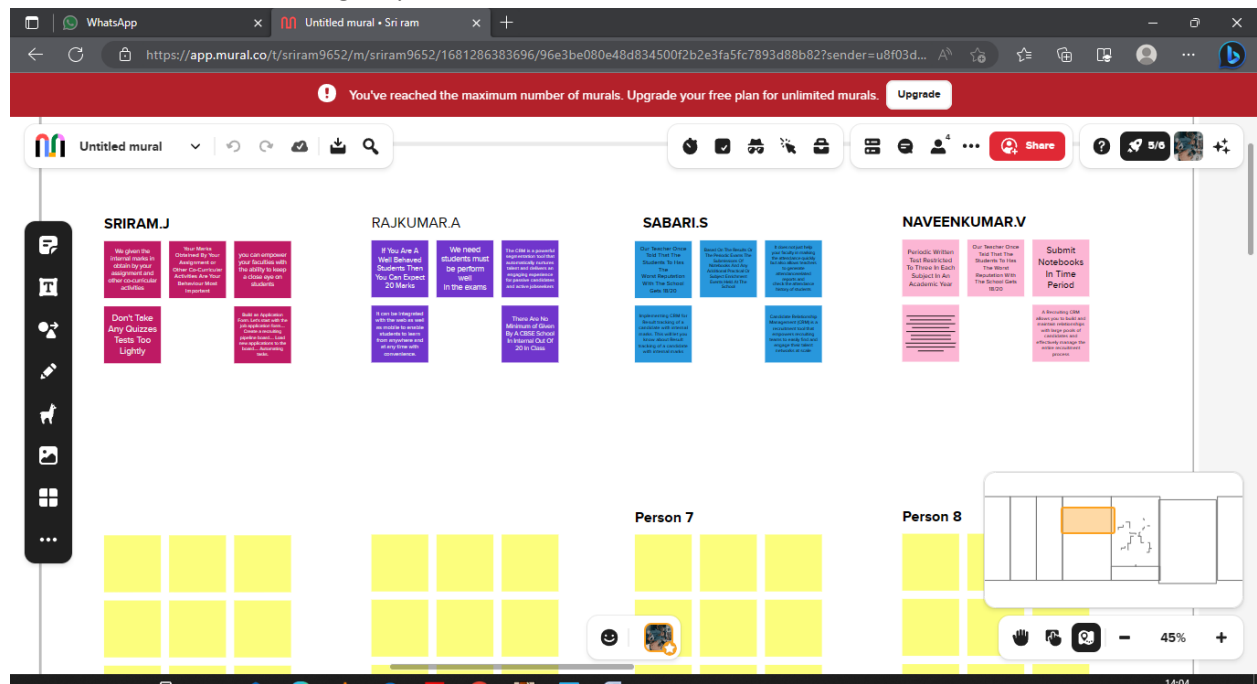
Basically, it helps nurture relationships with customers for long-term sales. Although the underlying principle in CRM is not to squeeze out more profits but to make customers happy, which in turn results in product loyalty and more revenues for the business.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy map:



2.2 Ideation & Brainstroming Map:



The screenshot displays a Mural collaborative workspace. At the top, a red banner reads: "You've reached the maximum number of murals. Upgrade your free plan for unlimited murals. Upgrade". Below this, the Mural interface shows a meeting titled "Untitled mural" with a 20-minute timer. The main workspace contains a mind map centered on "CRM" (Customer Relationship Management). The mind map branches include:

- Internal Culture:**
 - Internal Culture
 - Add customer tags to sticky notes to make it easy to find, browse, organize, and categorize. Research ideas. Merge and edit your mural.
- The 3 pillars of CRM: Marketing, digital projects, Customer interaction layer...**
- Products and services: Products and services contribute the core of business offerings.**
- CRM** (Central Node)
- Marketing and Sales:**
 - Marketing and Sales
 - 3,350 Degrees View of Data
- Based On The Results Of The Periodic Exams The Submissions Of Notebooks And Any Additional Practical Or Subject Enrichment Events Held At The School**
- Importance:**
 - Importance
 - How can I get done what I want to do with what I have?
- Participants can use their cameras to point and write on sticky notes. You can also use the Mural app to control the tool by using the Mural app on your phone.**
- An online student tracking system software is an online tool or software that offers provisions like online student attendance management, assignments upload & sharing, e-learning, examination management & reporting, and much more to keep a tab on daily students' activities & their performance.**
- If You Are A Well Behaved Student Then You Can Earn 20 Marks**
- You can empower your faculties with the ability to keep a close eye on students**

On the right side, there are several panels:

- Show the mural:** Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
- Export the mural:** Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save to your drive.
- Keep moving forward:**
 - Strategy blueprint:** Define the components of a new idea or strategy. [Open the template](#)
 - Customer experience journey map:** Understand customer needs, motivations, and obstacles for an experience. [Open the template](#)
 - Strengths, weaknesses, opportunities & threats:** Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan. [Open the template](#)
- 20%** (Zoom level)

The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 14:14 on 21-04-2023.

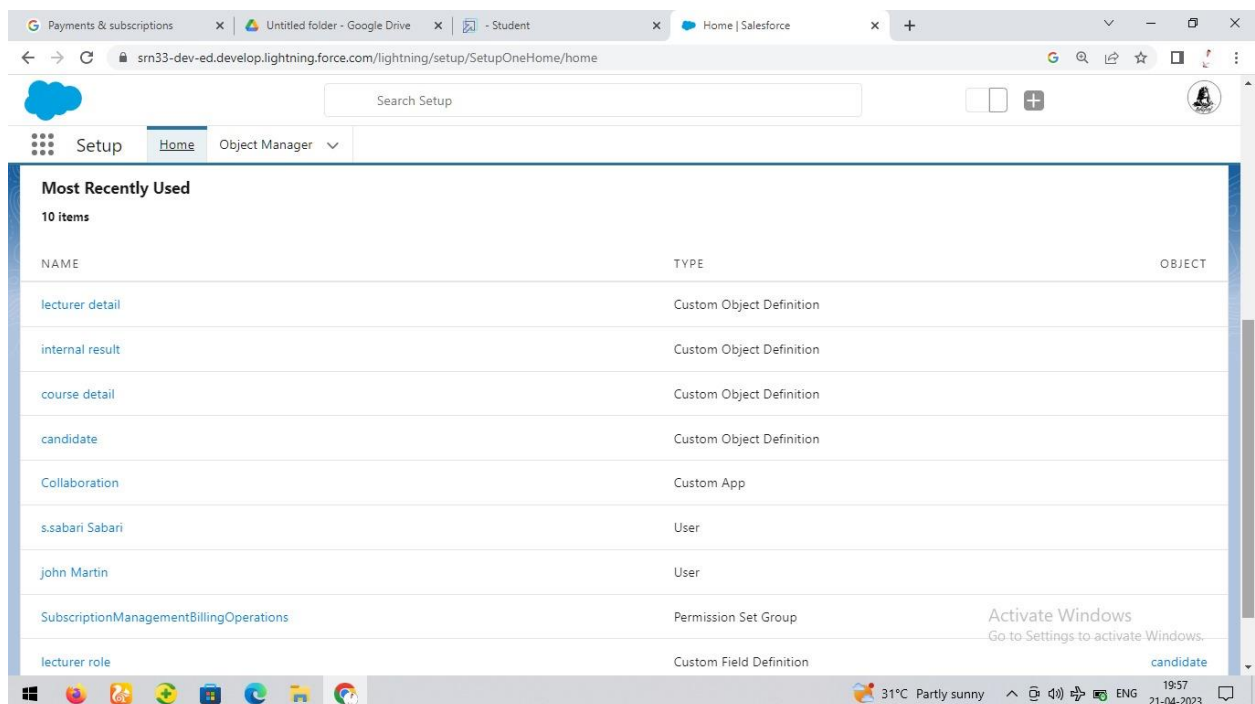
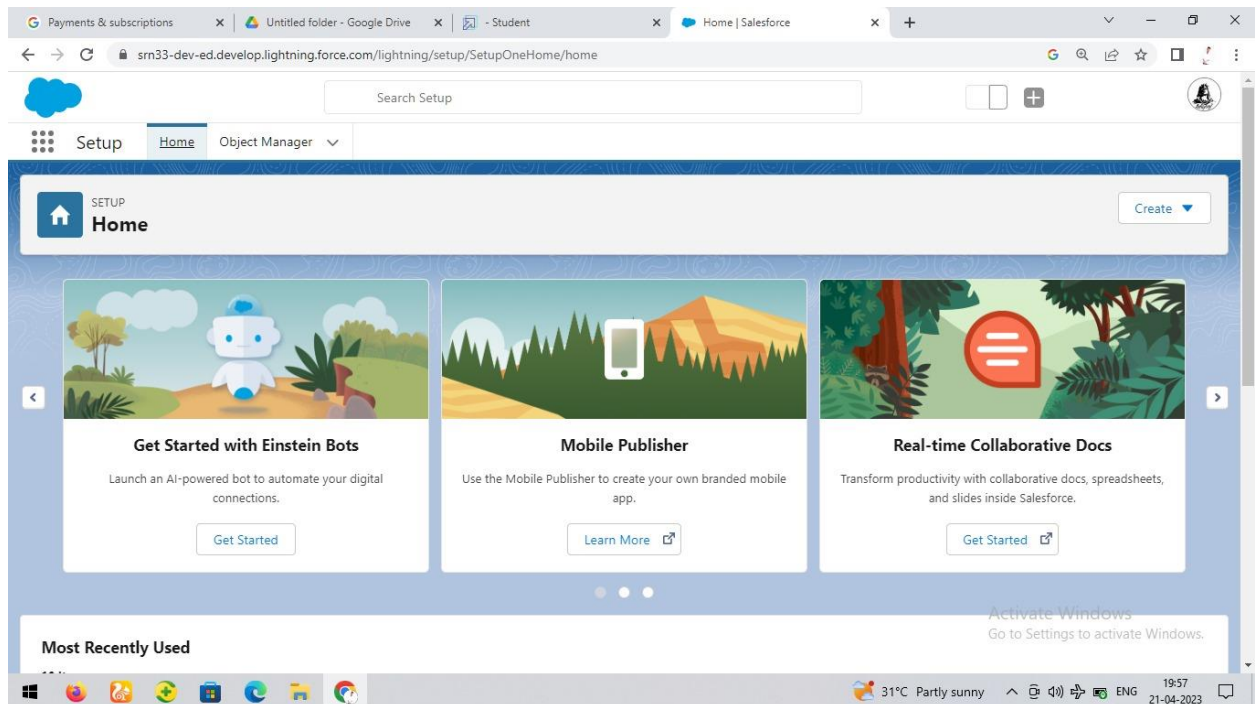
3. RESULT

3.1 Data model

Object name	Field in the object	
candidate	Field label	Data type
	Account name	name
	Account number	Text 40
	Account owner	Lookup user
	Account site	text
	Account source	picklist
	Active	Picklist
	Annual revenue	currency
	Billing address	address

3.2 Activity & screenshot:

MILESTONE -01:



MILESTONE -02:

Payments & subscriptions x | Untitled folder - Google Drive x | - Student x | Object Manager | Salesforce x | +

← → ↻ srm33-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

Object Manager
50+ Items, Sorted by Last Modified

Quick Find Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
candidate	candidate__c	Custom Object		21/04/2023	✓
internal result	internal_result__c	Custom Object		01/04/2023	✓
lecturer detail	lecturer_detail__c	Custom Object		01/04/2023	✓
course detail	course_detail__c	Custom Object		01/04/2023	✓
semester	semester__c	Custom Object		01/04/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			

Activate Windows
Go to Settings to activate Windows.

31°C Partly sunny 20:05 21-04-2023

MILESTONE -03:

The screenshot shows the Salesforce Lightning Experience App Manager setup page. The left sidebar contains a navigation menu with categories like Data, Apps, and Mobile Apps. The main content area is titled 'Lightning Experience App Manager' and features a 'Clone Apps (Beta)' section. In this section, the 'Enable App Cloning' toggle is turned on. Below this, there is a table listing 24 items, sorted by Last Modified Date, filtered by All appmenuitems - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The first three items are:

	App Name	Developer Name	Description	Last Modified	App Type	Visibility
1	candidate internal result card	candidate_internal_result_ca...		01/04/2023, 5:52 pm	Lightning	✓
2	table	sabarii	college management system	26/03/2023, 5:02 pm	Lightning	✓
3	table	table		25/03/2023, 5:11 pm	Lightning	✓

The screenshot shows the same Salesforce Lightning Experience App Manager setup page, but with a different view of the app list. The 'Enable App Cloning' toggle is still turned on. The table now displays 10 items, sorted by Last Modified Date, filtered by All appmenuitems - TabSet Type. The items are:

	App Name	Developer Name	Description	Last Modified	App Type	Visibility
1	candidate internal result card	candidate_internal_result_ca...		01/04/2023, 5:52 pm	Lightning	✓
2	table	sabarii	college management system	26/03/2023, 5:02 pm	Lightning	✓
3	table	table		25/03/2023, 5:11 pm	Lightning	✓
4	Sales	LightningSales	Manage your sales process ...	11/03/2023, 9:59 am	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage busin...	11/03/2023, 9:58 am	Lightning	✓
6	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appoint...	11/03/2023, 9:58 am	Lightning	✓
7	Queue Management	QueueManagement	Create and manage queues ...	11/03/2023, 9:56 am	Lightning	✓
8	All Tabs	AllTabSet		11/03/2023, 9:56 am	Classic	✓
9	Subscription Management	RevenueCloudConsole	Get started automating you...	11/03/2023, 9:56 am	Lightning	✓
10	Data Manager	DataManager	Use Data Manager to view li...	11/03/2023, 9:56 am	Lightning	✓

Payments & subscriptions x | Untitled folder - Google Drive x | Student x | Home | Salesforce x | App Manager | Salesforce x

sm33-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

Data

- Mass Transfer Approval Requests
- Apps
 - App Manager
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions
 - Mobile Apps
 - Salesforce
 - Salesforce Branding
 - Salesforce Navigation

Enable App Cloning ☒ Enabled

24 items • Sorted by Last Modified Date • Filtered by All appmenuitems • TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
11	Digital Experiences	SalesforceCMS	Manage content and media...	11/03/2023, 9:56 am	Lightning	✓
12	Platform	Platform	The fundamental Lightning ...	11/03/2023, 9:56 am	Classic	
13	Sales	Sales	The world's most popular sa...	11/03/2023, 9:56 am	Classic	
14	Service	Service	Manage customer service w...	11/03/2023, 9:56 am	Classic	✓
15	Marketing	Marketing	Best-in-class on-demand m...	11/03/2023, 9:56 am	Classic	✓
16	App Launcher	AppLauncher	App Launcher tabs	11/03/2023, 9:56 am	Classic	✓
17	Community	Community	Salesforce CRM Communities	11/03/2023, 9:56 am	Classic	✓
18	Site.com	Sites	Build pixel-perfect, data-ric...	11/03/2023, 9:56 am	Classic	
19	Salesforce Chatter	Chatter	The Salesforce Chatter socia...	11/03/2023, 9:56 am	Classic	✓
20	Content	Content	Salesforce CRM Content	11/03/2023, 9:56 am	Classic	✓

31°C Partly sunny 20:26 21-04-2023

MILESTONE -04:

The screenshot shows the Salesforce Setup interface for managing users. The browser address bar displays the URL: `srn33-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home`. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled "All Users" and includes a search bar, a "View: All Users" dropdown, and buttons for "Edit" and "Create New User". Below this, there is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, John Martin, Sabari s. sabari, User Integration, and User Security. Each user has an "Edit" link and a checkbox. The bottom of the screen shows a Windows taskbar with the date and time: 20:40, 21-04-2023.

Payments & subscrip... x | Untitled folder - Goo... x | - Student x | Home | Salesforce x | Users | Salesforce x | App Manager | Sales... x | +

srn33-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Paused And Failed Flow

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00d2w00000rk4xlead.khsdcif9hhsz@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	John Martin	John	johnmartin4545@gmail.com		✓	Minimum Access - Salesforce
<input type="checkbox"/> Edit	Sabari s. sabari	sSaba	nithinsabari4545@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rk4xlead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsssecurity@00d2w00000rk4xlead.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

Activate Windows
Go to Settings to activate Windows.

31°C Partly sunny 20:40 21-04-2023

MILESTONE -05:

The screenshot displays the Salesforce Reports page. The browser address bar shows the URL: `sm33-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui`. The Salesforce navigation bar includes the 'Sales' logo and a menu with options: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), and More. A search bar is located in the top right of the navigation bar.

The 'Reports' section is active, showing a 'Recent' view with 5 items. A search bar for recent reports is at the top right of the section, along with 'New Report' and 'New Folder' buttons. A left-hand sidebar lists navigation options: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and a 'To Do List' link at the bottom.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New semesters Report		Private Reports	s.sabari Sabari	4/4/2023, 10:49 am	
Created by Me	New candidates Report		Private Reports	s.sabari Sabari	4/4/2023, 11:01 am	
Private Reports	New lecturer details Report		Private Reports	s.sabari Sabari	4/4/2023, 11:10 am	
Public Reports	New course details Report		Private Reports	s.sabari Sabari	4/4/2023, 11:09 am	
All Reports	New internal results Report		Private Reports	s.sabari Sabari	4/4/2023, 11:06 am	

An 'Activate Windows' watermark is visible in the bottom right corner of the application window. The Windows taskbar at the bottom shows the system clock as 20:42 on 21-04-2023, with a weather forecast of 31°C Partly sunny.

MILESTONE -06:

Payments & subscrip... x | Untitled folder - Goo... x | - Student x | Home | Salesforce x | Dashboards | Salesfo... x | Reports | Salesforce x | +

sm33-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports More

Dashboards

Recent

3 items

Search recent dashboards...

New Dashboard New Folder

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	candidate board		candidate mark	s.sabari Sabari	4/4/2023, 1:09 pm	✓
Created by Me	candidate board		Private Dashboards	s.sabari Sabari	4/4/2023, 12:00 pm	
Private Dashboards	candidate board		Private Dashboards	s.sabari Sabari	4/4/2023, 11:21 am	

Activate Windows
Go to Settings to activate Windows.

To Do List

31°C Partly sunny 20:45 21-04-2023

4. Trailhead Profile Public URL:

Team head: <https://trailblazer.me/id/sriram2002>

Team member 1: <https://trailblazer.me/id/rajkumar2003>

Team member 2: <https://trailblazer.me/id/sabari13>

Team member 3: <https://trailblazer.me/id/nkumar2850>

5. ADVANTAGES & DISADVANTAGE :

A CRM can help you identify customer needs, track feedback, and manage your customer service improvements. The reporting features also allow you to track customer metrics from several different sources, such as help desk metrics, customer satisfaction scores, and more. Certain businesses where customer transactions are highly standardised may not benefit from a CRM system. A CRM system works best where personalisation is required in client/company interactions and where there are multiple touch-points over time between the client and the business across departments.

The advantages of a CRM system are available to salespeople, marketing teams, customer service professionals, and anybody who interacts with customers in large and small organisations.

6. APPLICATIONS :

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. CRM can analyze data and generate reports whenever required. There are mainly three types of CRM applications – Operational, Analytical and Collaborative to perform all these activities. Web CRM applications are excellent as an add-on service to your desktop application. As such, you will certainly use them when you can not use your own computer or phone. At the same time, they can be used in companies where most employees work with Outlook, but some of them prefer .

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 thus ensure long-term customer loyalty.

CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs

Customer profitability analysis allows you to segment your customers by their profit contribution to your brand and optimize your marketing, customer service, and operations costs around the customer segments who are the most profitable for your brand.

8. FUTURE SCOPE:

With the help of a CRM system, companies solve sales problems, increase the productivity of employees, and regularly monitor important financial indicators. According to EPCGroup's analytics, CRMs exploded in 2022, achieving an 11.6% CAGR from 2022 to 2027. Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business. Report Overview. The global customer relationship management market size was valued at USD 58.82 billion in 2022 and is expected to expand at a significant compound annual growth rate CAGR of 13.9% from 2023 to 2030