

Project Report Template

1 INTRODUCTION

1.1 Overview

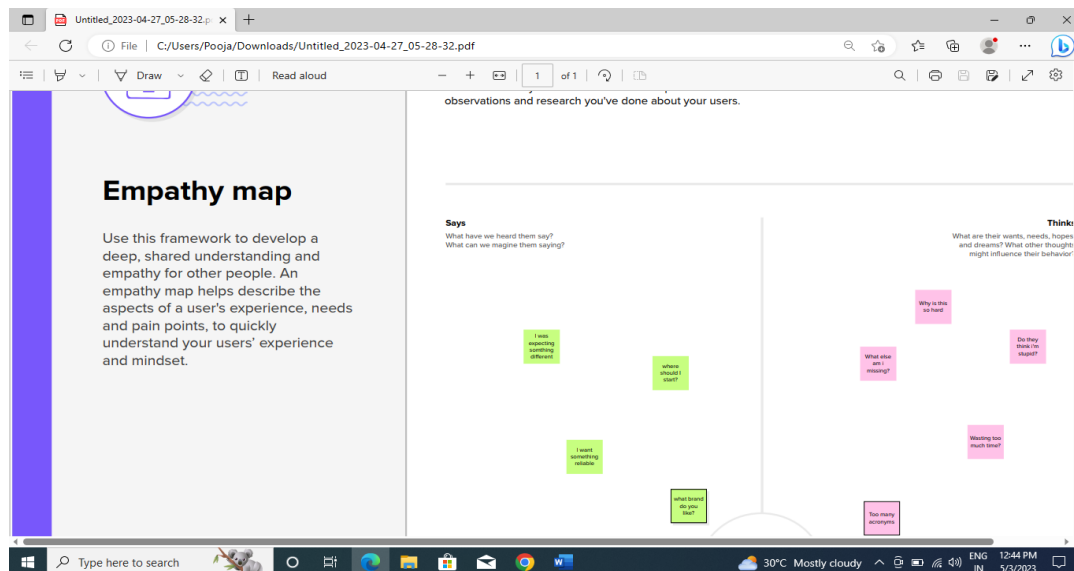
Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving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

1.2 Purpose

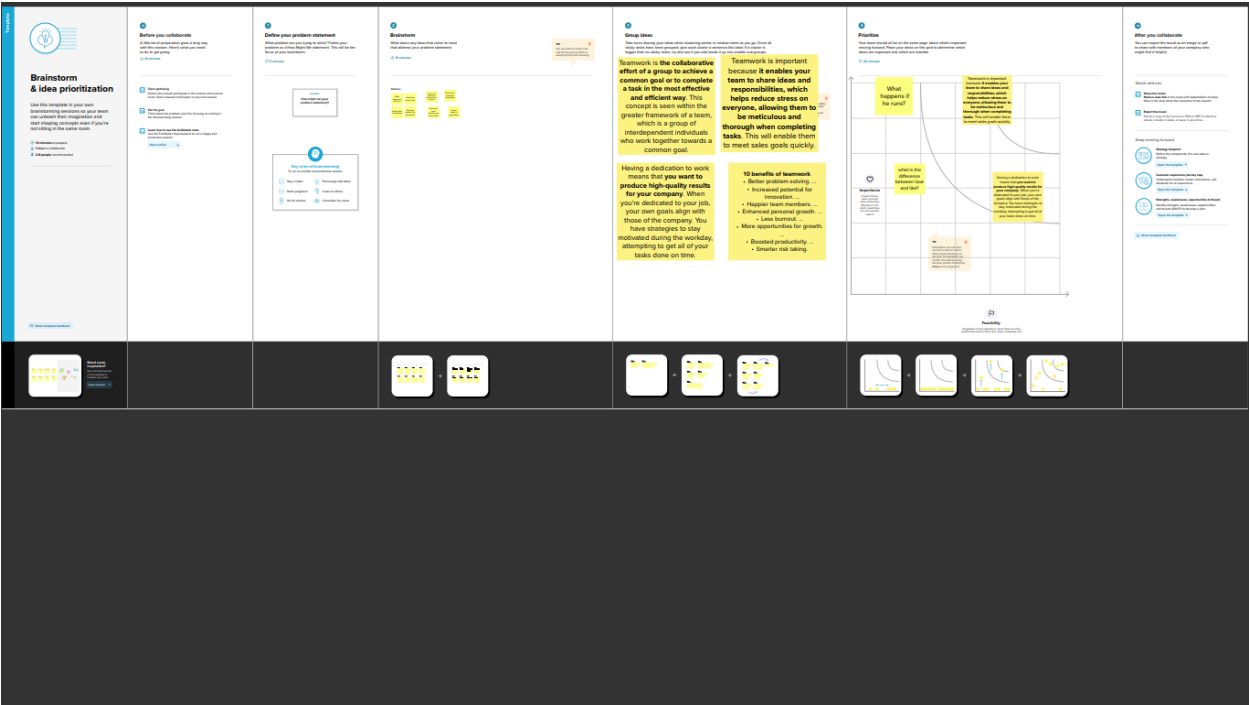
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
obj1	Field label	Data type
	Account	Currency
	Application	Formula
obj2	Field label	Data type
	Contact	Ratio
	Contract	Region

3.2 Activity & Screenshot

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GET TO KNOW FIELDS

Every standard and custom object has fields attached to it. Let's get familiar with the different types of fields.

Field Type	What is it?	Can I get an example?
Identity	A 15-character, case-sensitive field that's automatically generated for every record. You can find a record's ID in its URL.	An account ID looks like 0015000000Gv7qJ.
System	Read-only fields that provide information about a record from the system, like when the record was created or when it was last changed.	CreatedDate, LastModifiedById, and LastModifiedDate.
Name	All records need names so you can distinguish between them. You can use text names or auto-numbered names that automatically increment every time you create a record.	A contact's name can be Julie Bean. A support case's name can be CA-1024.
Custom	Fields you create on standard or custom objects are called custom fields.	You can create a custom field on the Contact object to store your contacts' birthdays.

Time Estimate
⌚ About 15 mins

Topics

- Learning Objectives
- Accessibility
- Overview of Objects
- Get to Know Objects
- Create a Custom Object
- Get to Know Fields**
- Create a Custom Field
- Create a Record
- Customize Responsibly
- Resources

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PROPERTY
3711 West Elm St.

RELATEDDETAILS

Property Name	Owner
3711 West Elm St.	D'Angelo Cunningham
Price	
\$425,000	
Created By	Last Modified By
D'Angelo Cunningham, 5/8/2017 12:40 PM	D'Angelo Cunningham, 5/8/2017 12:40 PM

Time Estimate
⌚ About 15 mins

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4 Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/srollno13>

Team Member 1 - <https://trailblazer.me/id/akumar8505>



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5 ADVANTAGES & DISADVANTAGE

It facilitates things by giving you and the customer, ease of communication, organized data, and improved customer service.

A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. Customer relationships may break down and result in loss of revenue, unless everyone in the business is committed to viewing their operations from the customers' perspective.

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.

7 CONCLUSION

By intelligently storing and managing your customers' information, a CRM system increases the number of leads coming in, helping your marketing team find new customers faster.

8 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.