

1 INTRODUCTION

## 1.1 Overview

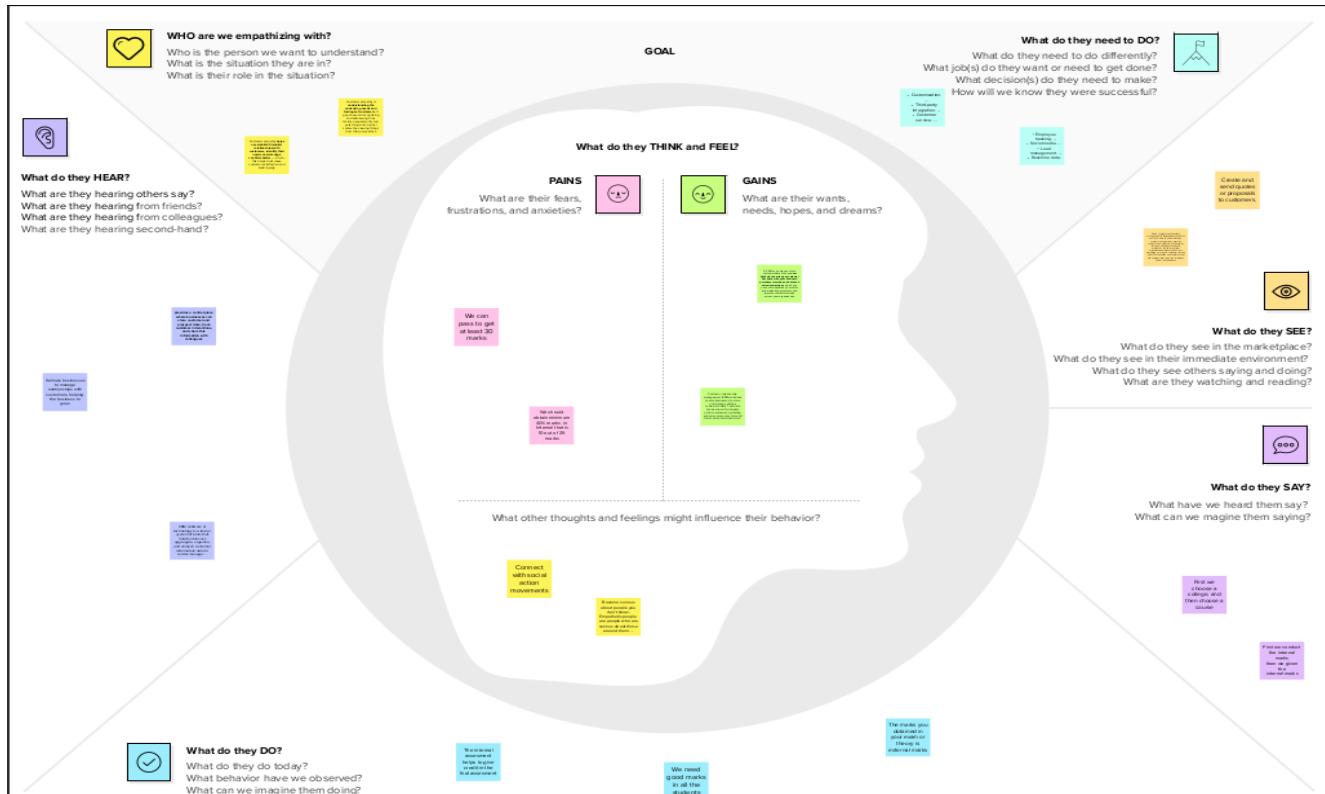
Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

## 1.2 Purpose

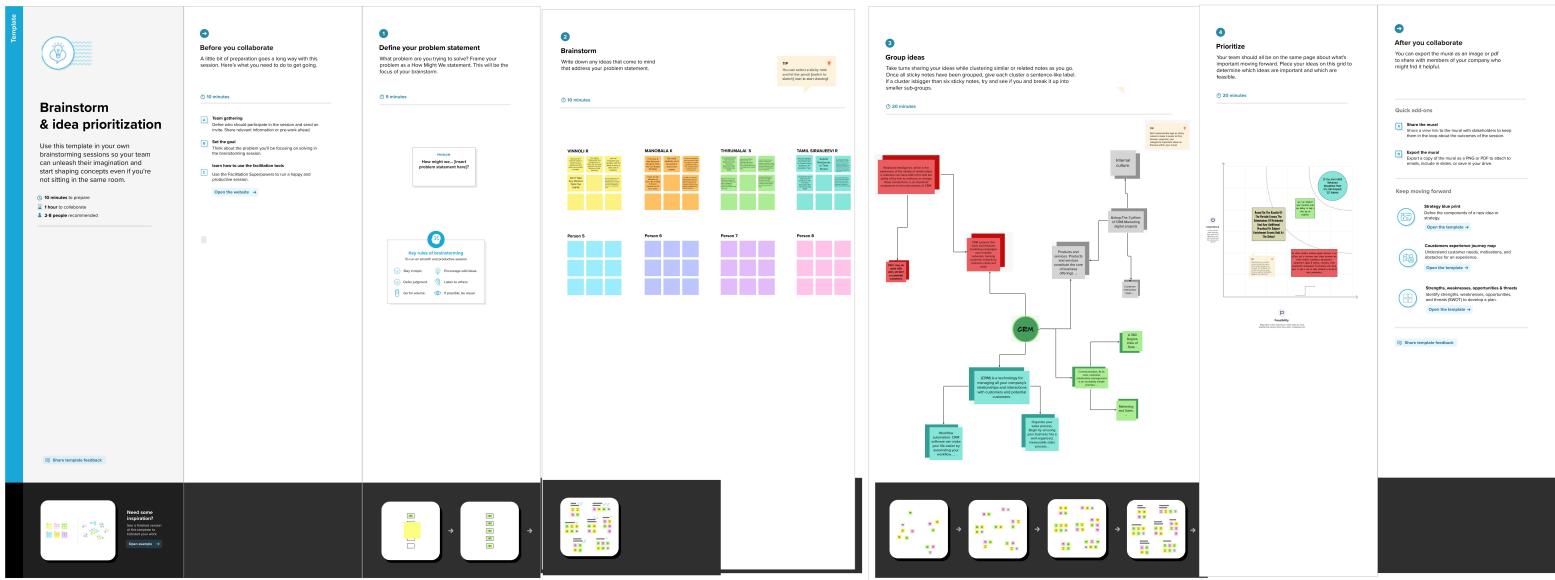
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve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

## 2 Problem Definition & Design Thinking

## 2.1 Empathy Map Canvas



## 2.2 Brainstorming & Idea Prioritization Template



## 3 RESULT

### 3.1 Data Model:

Object Name	Fields in the Object	
	Field label	Data type
School	Address	Text area
	District	Text area
	State	Text area
	School	Text area
	Phone Number	Phone
	No of Students	Roll up Summary
	Highest Mark	Roll up Summary

	<b>Field label</b>	<b>Data type</b>
<b>Student</b>	Phone Number	Phone
	School	Master-Detail Relationship
	Result	Picklist
	Class	Number
<b>Parent</b>	Parent Address	Text Area
	Parent Number	Phone

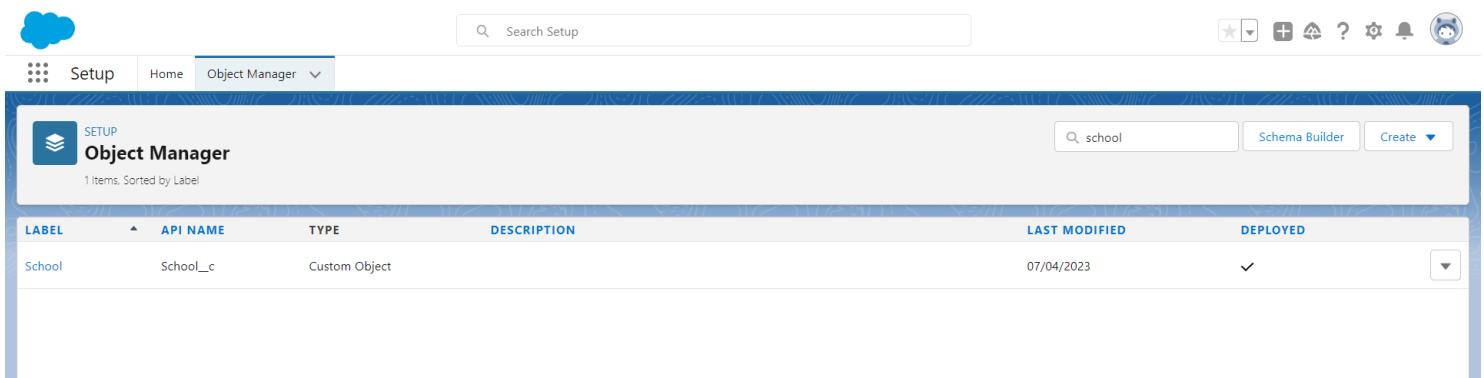
### 3.2

### Activity & Screenshot

(Milestone-2:OBJECT)

#### Activity-1 : Creation of School Object

# Creation of Object for School Management



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'school'. Below the search bar, there is a 'Schema Builder' button and a 'Create' dropdown menu. The main area is titled 'Object Manager' and shows a table with one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
School	School_c	Custom Object		07/04/2023	✓

( Milestone-2:OBJECT )

### Activity-2 : Create Student Object

#### # Creation of Student Object



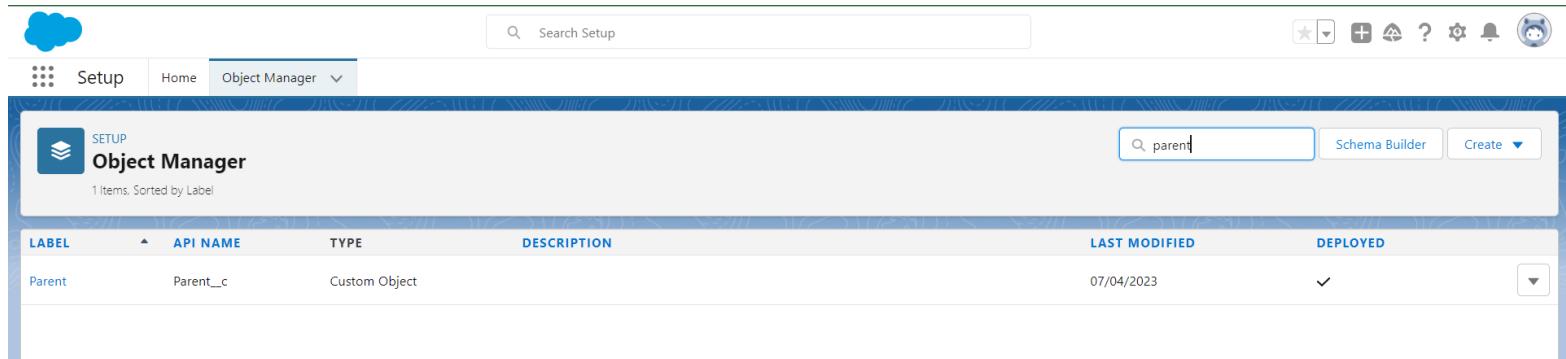
The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'student'. Below the search bar, there is a 'Schema Builder' button and a 'Create' dropdown menu. The main area is titled 'Object Manager' and shows a table with one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student_c	Custom Object		07/04/2023	✓

( Milestone-2: OBJECT )

### Activity-2 : Create Parent Object

# Creation of Parent Object

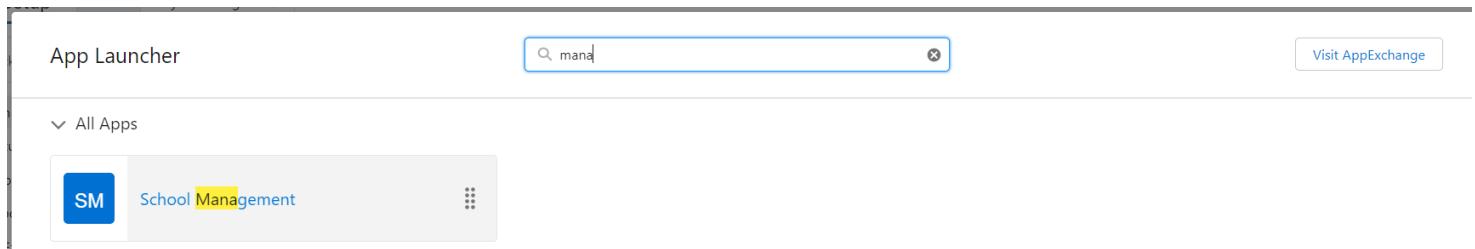


The screenshot shows the Salesforce Object Manager interface. At the top, there are navigation links: Setup, Home, and Object Manager. A search bar contains the text "parent". Below the header, the title "Object Manager" is displayed with a "SETUP" button. A message indicates "1 Items. Sorted by Label". The main area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One item is listed: "Parent" with API name "Parent\_\_c", Type "Custom Object", Last Modified on "07/04/2023", and a Deployed status indicated by a checkmark.

( Milestone-3: LIGHTNING APP )

### Activity-1 : Create the School Management App

# Creation School Management App

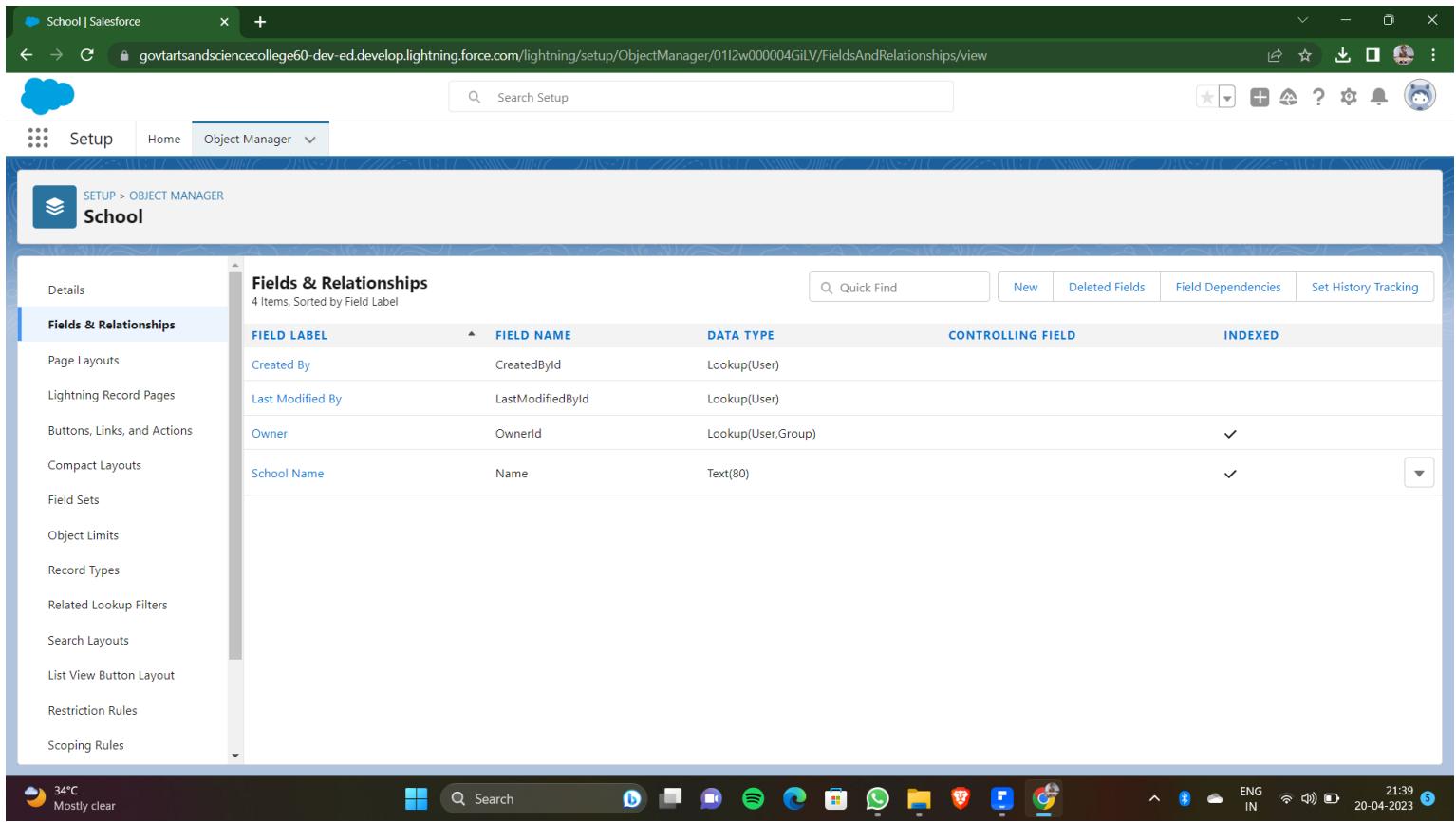


The screenshot shows the Salesforce App Launcher. At the top, it says "App Launcher" and has a search bar with the text "manag". A "Visit AppExchange" link is also present. Below the search bar, there is a section titled "All Apps" with a dropdown arrow. A custom app icon labeled "SM" is visible, along with the text "School Management".

## ( Milestone-4: FIELDS &amp; RELATIONSHIP )

**Activity-1 : Creation of fields for the School Objects**

# Creation of fields for the School Object



The screenshot shows the Salesforce Object Manager interface for the 'School' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section, which lists four fields: 'Created By', 'Last Modified By', 'Owner', and 'School Name'. The 'School Name' field is highlighted with a red border.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
School Name	Name	Text(80)		✓

## ( Milestone-4: FIELDS &amp; RELATIONSHIP )

**Activity-2 : Creation of fields for the Student Objects**

# Creation of fields for the Student Object

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
- List View Button Layout
- Restriction Rules
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Fields & Relationships**

13 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
address	address_c	Text Area(255)		
Class	Class_c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
District	District_c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks_c	Number(18, 0)		
Phone number	Phone_number_c	Phone		
Phone number	Ph_c	Phone		
Result	Result_c	Picklist		
School	School_c	Text Area(255)		
School	sckl_c	Master-Detail(School)		
State	State_c	Text Area(255)		
Student Name	Name	Text(80)		

**( Milestone-4: FIELDS & RELATIONSHIP )****Activity-3 : Creation of fields for the Parent Objects**

## # Creation of fields for the Parents Object

Parent | Salesforce

govartsandsciencecollege60-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000004GIMs/FieldsAndRelationships/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
Parent

Details

**Fields & Relationships**

6 Items, Sorted by Field Label

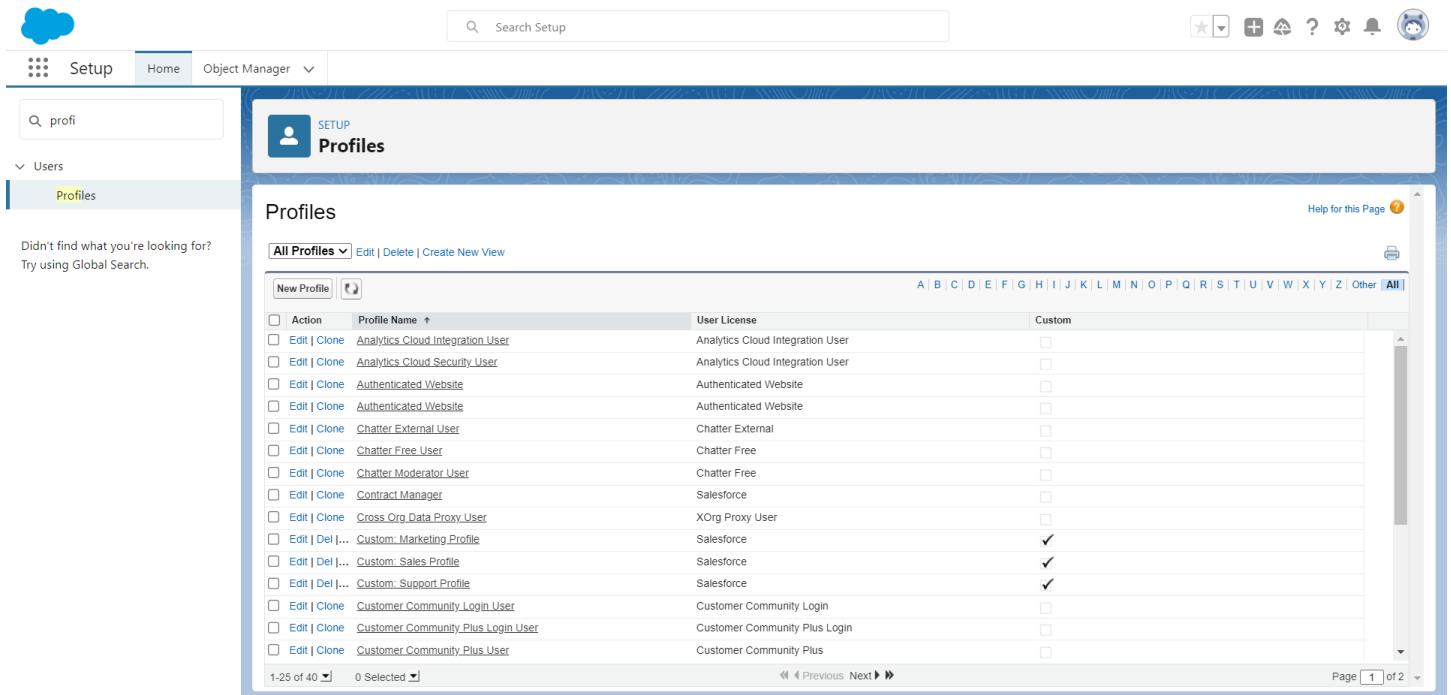
Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Parent address	Parent_address_c	Text Area(255)		
Parent Name	Name	Text(80)		
Parent Number	Parent_Number_c	Phone		

( Milestone-5: PROFILE )

### Activity-1 : Creation on Profile

#### # Creation on Profiles



The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global search and configuration icons. On the left, a sidebar lists 'Users' and 'Profiles'. The main content area is titled 'Profiles' and displays a list of profiles with columns for Action, Profile Name, User License, and Custom status. The 'User License' column lists standard and custom user types. The 'Custom' column contains checkboxes, many of which are checked for specific profiles like 'Custom Marketing Profile', 'Custom Sales Profile', and 'Customer Community Plus User'. Navigation at the bottom includes links for 'All Profiles', 'Edit', 'Delete', and 'Create New View', along with page numbers '1-25 of 40' and 'Page 1 of 2'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross_Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

( Milestone-6: USERS )

### Activity-1 : Creating a Users

#### # Creating a 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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00d2w00000rk6lead.ohoaay02lysm@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	R_vinnoli	vino	vinnolivinnoli3@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	R_vinnoli	vr	parentsvinnolivinnoli3@gmail.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	R_vinnoli	vr	teachervinnolivinnoli3@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	R_vinnoli	vr	principalvinnolivinnoli3@gmail.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00d2w00000rk6lead.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d2w00000rk6lead.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## ( Milestone-7: PERMISSION SETS )

### Activity-1 : Permission sets 1:

#### # To Set Permissions

Permission Sets

On this page you can create, view, and manage permission sets.

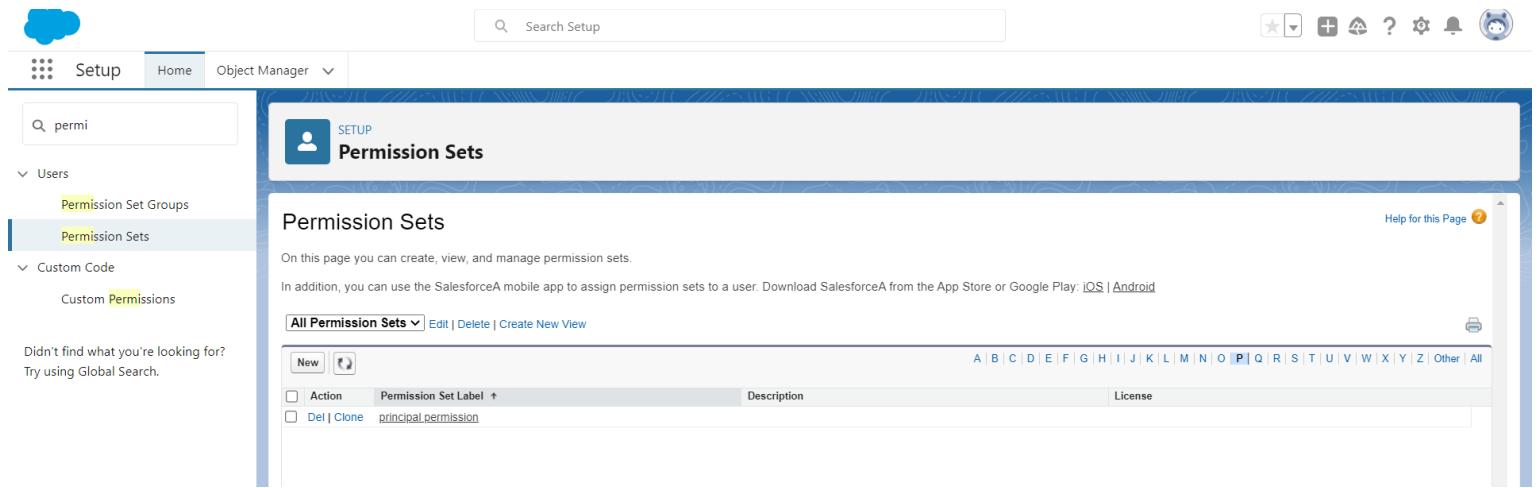
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Access supervisor features in Service Cloud Voice contact centers th...	Service Cloud Voice User
<input type="checkbox"/>	Del   Clone	Experience Profile Manager	Salesforce
<input type="checkbox"/>	Clone	Lets users create, read, edit, and delete locations, sublocations, que...	Facility Manager
<input type="checkbox"/>	Clone	Give your mobile workforce access to the Field Service mobile app. S...	Field Service Mobile
<input type="checkbox"/>	Clone	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Clone	Access to all features enabled by Order Management	Lightning Order Management User

## ( Milestone-7: PERMISSION SETS )

## Activity-2 : Permission sets 2:

# To Set Permissions

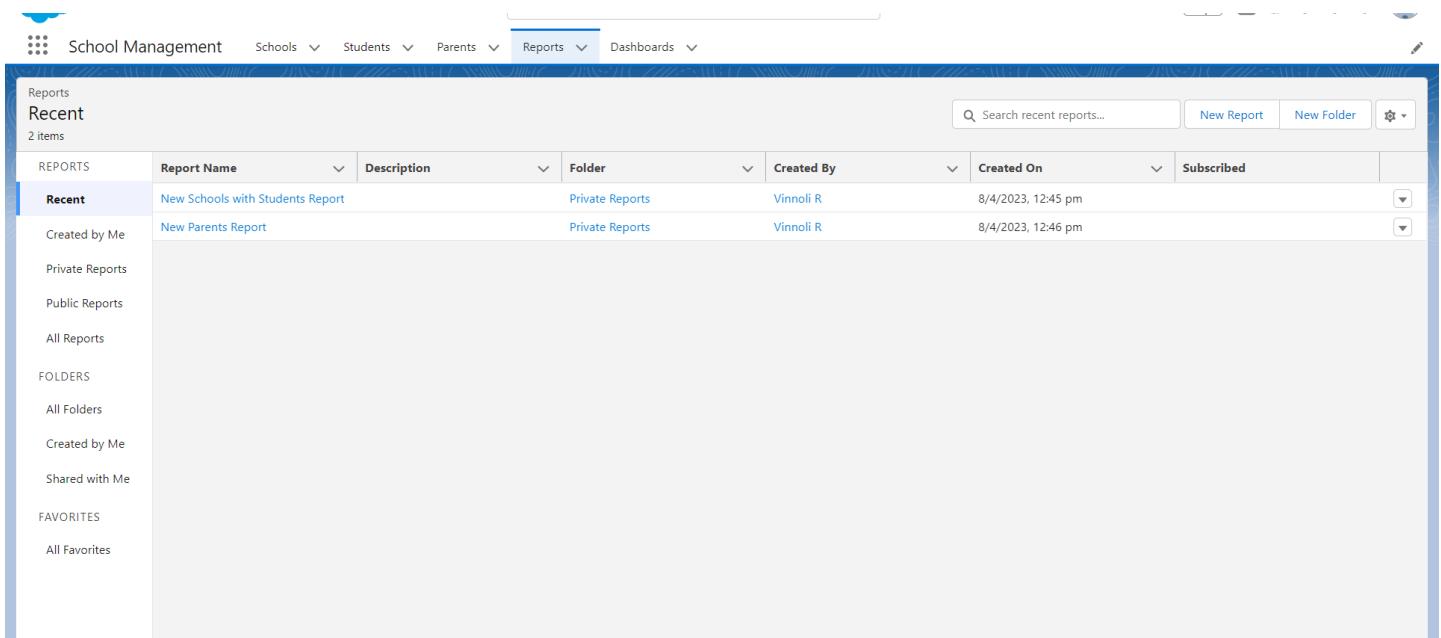


The screenshot shows the Salesforce Setup interface. The left sidebar has 'Users' expanded, with 'Permission Sets' selected. The main content area is titled 'Permission Sets' and displays a table of permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. A navigation bar at the top includes 'Search Setup', a magnifying glass icon, and various global buttons.

## ( Milestone-8: REPORTS )

## Activity-1 : Reports

# Reports



Reports

Recent

2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Schools with Students Report		Private Reports	Vinnoli R	8/4/2023, 12:45 pm	
Created by Me	New Parents Report		Private Reports	Vinnoli R	8/4/2023, 12:46 pm	

REPORTS

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

4

**TRAILHEAD PROFILE PUBLIC URL:**

TEAM LEAD - <https://trailblazer.me/id/tcrush1>

Team Member 1 - <https://trailblazer.me/id/m1512>

Team Member 2 - <https://trailblazer.me/id/r105>

Team Member 3 - <https://trailblazer.me/id/ttamil33>

**[ADVANTAGES]****1. Better customer service**

Modern CRM software has many functions, but the software was created to improve business-customer relationships, and that's still its main benefit. A CRM manages all of your contacts and gathers important customer information—like demographics, purchase records and previous messages across all channels—and makes it easily accessible to anyone in your company who needs it. This ensures that your employees have all they need to know about the customer at their fingertips and can provide a better customer experience, which tends to boost customer satisfaction.

**2. Increased sales**

A CRM tool can help you streamline your sales process, build a sales pipeline, automate key tasks and analyze all of your sales data in one centralized place, potentially increasing sales and productivity. A CRM helps you establish a step-by-step sales process that your employees can rely on every time and that you can easily tweak as issues arise.

**3. Improved customer retention**

Once you've procured and converted leads, it's vital that you put in the work to retain them as customers and promote customer loyalty. High customer turnover can have many negative effects for your business, like diminished revenue or disrupted cash flow, so use your CRM and the information it provides about your customers to encourage repeat business. The CRM will provide sentiment analysis, automated ticketing, customer support automation and user behavior tracking to help you determine problems and quickly address them with your customers.

**4. Detailed analytics**

It's one thing to have plenty of data about your customers, but you need to know what it means and how to use it. CRM software typically has built-in analytic capabilities to contextualize data, breaking it down into actionable items and easily understood metrics. Metrics such as click-through rates, bounce rates, and demographic information allow you to judge the success of a marketing campaign and optimize accordingly.

## 5. Higher productivity and efficiency

CRM software uses marketing automation technology, which expedites menial tasks like drip campaigns and frees up your employees' time to focus on work only humans can handle, like creating content. It can also ensure that no tasks slip through the cracks (e.g., all important emails are always sent to the right people). Additionally, a CRM can show you a dashboard of how your business processes are working and where your workflows could improve. [Read related article: How Workplace Automation Software Can Help Your Business]

## 6. Automated sales reports

Your team can easily collect and organize data about prospective and current customers using the CRM software's dashboard and reporting features, which allow employees to automate and manage their pipelines and processes. The CRM can also help your team members evaluate their performance, track their quotas and goals, and check their progress on each of their projects at a glance.

## [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. Have poor usability

Some CRM systems could be more user-friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.

### 3. 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.

### 4. Having lots of security concerns

There are many security issues with CRM, such as data loss and data being hacked by someone. In CRM, the collected data is stored at one centralized location that can be accessed by unfair means. In another case, inaccurate data can be added by employees, or they manipulate figures leading to wrongful planning.

### 5. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect 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.

### 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.

### 7. Experience-based procedure in all the stages

Small businesses may not require it, but large businesses use CRM on a large scale. For this purpose, they train their employees by providing training sessions from the appointed professionals. The company invests in employee training to improve its productivity, where employees encounter and learn the various features and functions of CRM. This experience will help them in all the stages of CRM.

( 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.

Business is an ongoing process that has to update itself with time (adopt new technologies) to remain in the competition.

Before technology, customer data or CRM was based on papers, but slowly, companies started tracking customer-related data with spreadsheets, emails, address books, and other ways.

But due to a lack of automation and integration, it becomes difficult for them to find and share up-to-date information when required quickly. It also down their ability to create marketing strategies, provide customers flawless service, and peruse new sales leads.

CRM is a powerful tool that automatically collects information about existing and prospective customers (their personal or professional information, including social media posts, phone numbers, email addresses, phone numbers, service, purchase history, and support tickets). Further, the whole information is integrated by the system and generates consolidated profiles that can be shared with appropriate teams. One of the best features of CRM is that it can connect with other business tools, such as document-sharing apps and online chat.

Artificial intelligence and business intelligence capabilities are built in CRM that accelerate administrative tasks and provide actionable insights. Customer relationship management's advantages and disadvantages will help you understand it in detail.