# DEVELOPMENT AND IMPLEMENTATION OF CRM ENHANCEMENTS FOR OPTIMIZING COMPANY WORKFLOW

## Internship Project Report

**Submitted for the partial fulfillment of the degree of**

## Bachelor of Technology

**In**

## Mathematics & Computing


**Submitted By**

**Soumyadeep Sinha**

**0901MC201064**

**UNDER THE SUPERVISION AND GUIDANCE OF**

**Dr. D K Jain**

**Professor and Faculty coordinator**

**Department of Mathematics & Computing**




माधव प्रौद्योगिकी एवं विज्ञान संस्थान, ग्वालियर (म.प्र.), भारत

**MADHAV INSTITUTE OF TECHNOLOGY & SCIENCE, GWALIOR (M.P.), INDIA**

Deemed to be University

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**January - June, 2024**

## DECLARATION BY THE CANDIDATE

I hereby declare that the work entitled **"Development And Implementation Of CRM Enhancements For Optimizing Company Workflow"** is my work, conducted under the supervision of **Anurag Pawar, Training Head,** during the session Jan-May 2024. The report submitted by me is a record of bonafide work carried out by me.

I further declare that the work reported in this report has not been submitted and will not be submitted, either in part or in full, for the award of any other degree or diploma in this institute or any other institute or university.

**Date :** 17/05/2024

**Place :** Gwalior

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This is to certify that the above statement made by the candidates is correct to the best of my knowledge and belief.

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## PLAGIARISM CHECK CERTIFICATE

This is to certify that I/we, a student of B.Tech. in **Engineering Mathematics & Computing** have checked my complete report entitled **"Development And Implementation Of CRM Enhancements For Optimizing Company Workflow"** for similarity/plagiarism using the "Turnitin" software available in the institute.

This is to certify that the similarity in my report is found to be ....9%..... which is within the specified limit (30%).

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# ABSTRACT

This internship project report explores the development and implementation of Customer Relationship Management (CRM) enhancements aimed at optimizing workflow efficiency within a company. The focus was on creating a comprehensive CRM system with multifaceted features to streamline customer interactions, project management, sales, and marketing activities.

The project involved the design and implementation of various key components:

1. **Dashboard Page:** A centralized interface displaying summary metrics, upcoming tasks, recent activities, and quick links for common actions.
2. **Customers Page:** Detailed customer profiles with interaction history, notes, and follow-up capabilities.
3. **Leads and Opportunities Page:** Management of leads, conversion into opportunities, and tracking of sales processes.
4. **Service Requests Page:** Submission, assignment, and management of service requests with customer feedback integration.
5. **Projects Page:** Comprehensive project overview with milestone tracking, task management, and resource allocation.
6. **Sales and Marketing Page:** Lead capture, email campaign management, quoting, invoicing, and sales analytics.
7. **Reports and Analytics Page:** Customizable dashboards, sales forecasting, customer segmentation, and report generation.
8. **Settings Page:** User management, role-based permissions, and integration configurations.

Each component aimed to enhance operational efficiency, customer service, and decision-making through data-driven insights and streamlined processes.

This report delves into the project's objectives, methodologies, implementation strategies, challenges encountered, and outcomes achieved. It highlights the significance of CRM systems in modern business operations and their impact on workflow optimization and customer satisfaction.

## ACKNOWLEDGEMENT

I am deeply grateful to Madhav Institute of Technology and Science for providing me with the opportunity to undertake this final year internship project under the Flexible Curriculum Scheme. I extend sincere thanks to Dr. R. K. Pandit, Director of the institute, and Dr. Manjaree Pandit, Dean of Academics, for their invaluable support.

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**Soumyadeep Sinha**

**0901MC201064**

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# ACRONYMS

| ACRONYM | FULL FORM |
|---|---|
| AICTE | All India Council for Technical Education |
| CRM | Customer Relationship Management |
| DEPT. | Department |
| IEEE | Institute of Electrical and Electronics Engineers |
| IT | Information Technology |
| MITS | Madhav Institute of Technology and Science |
| SQL | Structured Query Language |

# NOMENCLATURE

| Acronym | Full Form |
|---|---|
| API | Application Programming Interface |
| ASi-5 | Actuator-Sensor Interface version 5 |
| CRM | Customer Relationship Management |
| DevOps | Development and Operations |
| GDPR | General Data Protection Regulation |
| HIPAA | Health Insurance Portability and Accountability Act |
| IoT | Internet of Things |
| IaaS | Infrastructure as a Service |
| MIS | Management Information System |
| PaaS | Platform as a Service |
| RDBMS | Relational Database Management System |
| SaaS | Software as a Service |
| SQL | Structured Query Language |

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# CHAPTER 1: INTRODUCTION

## 1.1 Introduction

The progression of cloud software, particularly under the umbrella of Software as a Service (SaaS) models, stands as a pivotal force reshaping the contemporary business terrain. This transformative shift prompts a thorough exploration of its ramifications on organizational operations, data management, and innovation. As businesses increasingly maneuver towards digital transformation, the integration of cloud-based solutions presents unparalleled opportunities for agility, scalability, and cost-effectiveness. This report endeavors to delve into the dynamic domain of cloud software, scrutinizing its transformative influence across a spectrum of sectors.

Online Work Power Management emerges as a critical facet of modern business operations, especially in facilitating remote work while mitigating energy consumption. This multifaceted strategy encompasses various approaches, including the optimization of software development processes, virtualization of infrastructure, and adoption of energy-efficient hardware and software solutions. For example, the embrace of agile methodologies and DevOps practices can streamline development workflows, curbing idle time and resource wastage. Furthermore, virtualization technologies facilitate server and application consolidation, promoting better resource utilization and reduced power consumption. Additionally, the deployment of energy management software allows for vigilant monitoring and control of power usage across the organization's IT infrastructure. By amalgamating software optimization, virtualization, and energy management practices, enterprises can attain equilibrium between productivity and environmental sustainability in their online work ecosystems.

Leveraging web-based platforms, teams can strategize, organize, and collaborate on projects from any location with internet connectivity. These platforms boast a plethora of features, ranging from task tracking to document sharing and team communication tools, thereby facilitating real-time collaboration and ensuring timely achievement of project milestones.

Analytics and Data Analysis emerge as pivotal drivers of data-informed digital marketing endeavors. Through the scrutiny of user behavior, engagement metrics, and campaign performance, marketers can fine-tune their strategies for optimal outcomes. Crafting a successful digital marketing strategy often necessitates a bespoke amalgamation of these activities, tailored to the brand's specific objectives and target audience. Regular evaluation and adjustment of strategies based on analytics and market trends stand as imperatives for sustained success in the ever-evolving digital landscape. Hence, organizations must embrace the potential of data-driven insights to maintain competitiveness and relevance in today's dynamic business milieu.

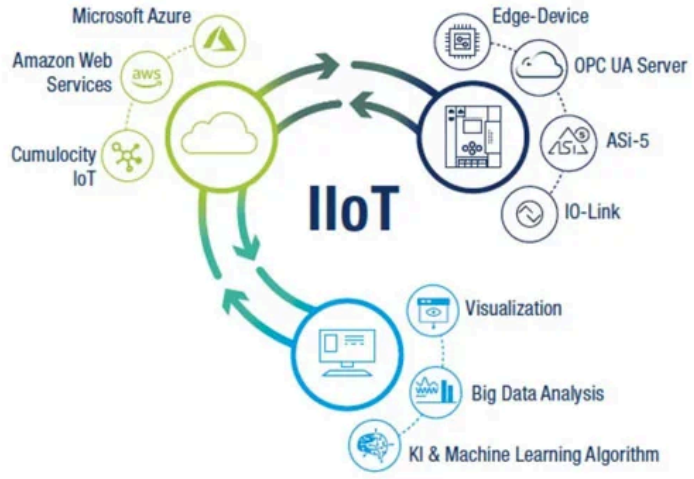
### 1.2 Need of cloud software in industries 4.0

Cloud software has become a cornerstone in the paradigm of Industry 4.0, where digital innovations are reshaping manufacturing and industrial processes. Its pivotal role stems from various key factors. Firstly, cloud solutions offer unparalleled scalability, enabling industries to swiftly adjust operations to changing demands without significant investments in infrastructure. This adaptability proves crucial in the dynamic environments of Industry 4.0, where agility is paramount. Secondly, cloud-based platforms provide cost-effective alternatives to traditional IT setups, with subscription-based models reducing upfront capital expenditures and ensuring predictable monthly costs. Additionally, cloud software facilitates global accessibility, allowing remote access to data and applications from anywhere with an internet connection, thereby supporting distributed teams and supply chains.

Moreover, the integration of analytics tools within cloud platforms enables real-time data processing and analysis, empowering informed decision-making and predictive maintenance strategies. Collaboration and connectivity are further bolstered through cloud solutions, facilitating seamless sharing of information and resources among stakeholders. Furthermore, leading cloud providers prioritize heavy investments in security measures to safeguard sensitive data ensure compliance with regulatory standards. Lastly, cloud software serves as a fundamental enabler for integrating emerging technologies such as artificial intelligence and the Internet of Things into industrial processes, harnessing its computing power and scalability to deliver advanced functionalities and insights.

In essence, cloud software is indispensable for industries navigating the landscape of Industry 4.0, providing the essential tools and infrastructure needed to drive digital transformation and sustain competitiveness in an increasingly interconnected and data-driven world.

Cloud computing, as a technology, involves developers transferring their data and applications to the cloud, accessible globally through internet services. According to the NIST definition of Cloud computing, IT resources are provided to consumers through three distinct service models: Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS). These models offer varying degrees of control over the underlying infrastructure and software, catering to diverse consumer needs and preferences.




Within the realm of Industry 4.0, machines and systems generate vast volumes of data, including machine data, process data, and diagnostic data. Successful implementation of Industry 4.0 projects hinges on processing and analyzing much of this data in IT. Seamless communication among devices in cyber-physical systems necessitates a robust data shuttle like ASi-5, offering high data bandwidth and short cycle times, simplifying the integration of smart sensors like IO-Link crucial for Industry 4.0.

Modern ASi-5/ASi-3 gateways play a vital role, featuring two independent interfaces for OPC UA and a fieldbus, facilitating direct data transfer to IT or control systems. They serve as a bridge between field devices and higher-level IT systems,

gathering valuable diagnostic data that complements device data from the field. Mitigating cyber risks is imperative, thus encrypted communication and authentication are prioritized. ASi-5/ASi-3 gateways also meet future security requirements through field update capability.

### 1.3 Definition of CRM:

CRM software stands as an indispensable technological platform designed to empower businesses in the storage, management, and analysis of customer data and interactions across multiple touchpoints. It encompasses a diverse array of features aimed at capturing and organizing intricate customer information, tracking communication history, automating sales and marketing processes, and facilitating seamless customer service and support. What sets CRM systems apart is their innate ability to adapt and cater to the specific needs of various industries and business models, providing unparalleled flexibility and scalability to meet evolving demands. Whether it's streamlining sales pipelines, optimizing marketing strategies, or enhancing customer service experiences, CRM software serves as a cornerstone in driving operational efficiency and nurturing enduring customer relationships.

#### 1.3.1 Purpose:

Centralizing Customer Data: CRM software serves as a pivotal tool in amalgamating customer data from disparate sources into a cohesive repository. This includes a spectrum of information, spanning from contact details and purchase history to communication preferences and engagements across diverse channels like email, phone calls, and social media platforms.

Improving Customer Relationships: Access to a holistic view of customer data empowers businesses to gain profound insights into their customers' needs, preferences, and behavioral patterns. CRM software facilitates tailored interactions, anticipation of customer requirements, and delivery of pertinent and timely communications, thereby fostering robust and enduring relationships with customers.

Enhancing Sales and Marketing Efforts: Streamlining sales and marketing operations, CRM software automates crucial tasks such as lead management, opportunity tracking, and campaign orchestration. It empowers sales teams to prioritize leads, identify

promising opportunities, and nurture prospects through targeted marketing endeavors, ultimately amplifying sales productivity and efficacy.

Optimizing Customer Service and Support: By furnishing tools for efficient ticket management, inquiry tracking, and prompt response facilitation, CRM software catalyzes seamless customer service and support operations. It enables businesses to provide consistent and personalized support experiences, resolve issues expeditiously, and uphold elevated levels of customer satisfaction.

Driving Business Growth: At its core, CRM software is engineered to propel business expansion by harnessing the full potential of customer relationships. Through fortifying customer retention, augmenting sales efficiency, and elevating customer contentment, CRM software becomes instrumental in fueling revenue escalation, market diversification, and sustained profitability.

**1.4 Google Cloud:**

Google Cloud represents an expansive suite of cloud computing services provided by Google. It encompasses infrastructure, platform, and software offerings, granting businesses and developers access to scalable computing resources, storage solutions, and networking capabilities. Supported by Google's extensive network of data centers worldwide, Google Cloud aims to empower organizations to foster innovation, agility, and operational efficiency through cloud technology. By embracing Google Cloud services, businesses can seamlessly build, deploy, and manage applications and services without the burden of substantial upfront investments in physical infrastructure. Google Cloud presents a wide array of tools and services tailored to help organizations modernize their IT infrastructure, develop and deploy new applications, analyze vast datasets, and harness the potential of emerging technologies like artificial intelligence and machine learning.

**1.5 My SQL:**

MySQL stands as a prominent technology within the modern big data landscape. Widely recognized as one of the most popular databases, it enjoys widespread and effective utilization across diverse industries. Its prevalence underscores the importance

for anyone engaged in enterprise data or general IT to possess at least a fundamental understanding of MySQL.

One of MySQL's key strengths lies in its ability to enable even those unfamiliar with relational systems to swiftly construct fast, robust, and secure data storage systems. Its programmatic syntax and interfaces serve as entry points into the broader realm of popular query languages and structured data stores.

### 1.5.1 What is MySQL:

MySQL, an acronym for "My Structured Query Language," serves as a relational database management system (RDBMS) developed by Oracle. It operates on the structured query language (SQL), offering a platform for managing structured collections of data. A database, in essence, acts as a structured repository for various types of information, ranging from simple lists to intricate corporate networks.

Specifically, a relational database adheres to the relational model, organizing data into tables composed of rows and columns. Relationships between data elements are governed by a strict logical structure within this model. An RDBMS encompasses the suite of software tools utilized to implement, manage, and query such databases.

MySQL plays an indispensable role in numerous popular software stacks utilized for developing and maintaining a diverse range of applications. Its open-source nature, stability, and extensive feature set, coupled with continuous development and support from Oracle, have cemented its position as a preferred choice for internet-critical organizations. Major entities like Facebook, Flickr, Twitter, Wikipedia, and YouTube rely on MySQL as the backbone of their operations.

## 1.6 Scope of the Study:

The scope of this study encompasses a detailed exploration of the development and implementation of CRM enhancements within a company's operational framework. The primary objectives include:

1. **Comprehensive Analysis of CRM Components:** The study will delve into each component of the CRM enhancements developed during the internship, including dashboard design, customer management features, lead and opportunity tracking,

service request management, project oversight tools, sales and marketing functionalities, and analytics capabilities.

2. **Methodologies and Implementation Strategies:** An examination of the methodologies employed in designing and deploying CRM enhancements, focusing on cloud-based solutions and agile development practices. This will include insights into software development processes, integration strategies, and user acceptance testing.

3. **Workflow Optimization and Customer Experience:** Emphasis will be placed on evaluating the impact of CRM enhancements on workflow efficiency, team collaboration, and customer relationship management. The study aims to assess how these enhancements facilitate data-driven decision-making and improve overall customer experience.

4. **Challenges and Solutions:** Identification and analysis of challenges encountered during the implementation phase, along with the corresponding solutions devised to overcome them. This will provide valuable insights into the practical aspects of deploying CRM enhancements in a real-world business context.

5. **Business Impact and Future Recommendations:** Examination of the business impact of CRM enhancements, including measurable outcomes such as improved productivity, enhanced customer satisfaction, and streamlined sales and marketing processes. The study will conclude with recommendations for further refinement and expansion of CRM functionalities.

In summary, the scope of this study is focused on elucidating the development, implementation, and impact of CRM enhancements within a company, highlighting their role in optimizing workflow efficiency and enhancing customer-centric strategies through cloud-based technologies.

### 1.7 Limitations of the Study:

Despite the comprehensive scope outlined above, certain limitations are inherent to this study:

1. **Single Company Context:** The study is confined to the experiences and outcomes observed within a specific company environment. Results and conclusions may not be universally applicable to different organizational settings or industries.

2. **Time and Resource Constraints:** The internship duration and resource availability may have imposed limitations on the depth and breadth of CRM enhancements that could be developed and evaluated. Certain features or functionalities may not have been fully explored due to these constraints.

3. **Generalizability:** Findings from this study may not be generalizable to all CRM implementation scenarios. Factors such as company size, industry sector, and existing technological infrastructure can significantly influence outcomes and applicability.

4. **Data Privacy and Confidentiality:** Due to confidentiality agreements and data privacy considerations, certain specific details or metrics related to the company's operations and outcomes may be omitted or generalized in the study.

5. **External Factors:** External market dynamics, technological advancements, or regulatory changes may have influenced the implementation and outcomes of CRM enhancements during the internship period. These external factors are beyond the scope of this study.

6. **Subjective Perspectives:** The study may be influenced by subjective interpretations and experiences of individuals involved in the project, including interns, project managers, and stakeholders.

Despite these limitations, the study aims to provide valuable insights into the practical aspects of CRM enhancement development and implementation within a real-world business context, serving as a foundation for future research and application in similar settings.

# CHAPTER 2: LITERATURE SURVEY

Cloud-based Customer Relationship Management (CRM) has attracted considerable attention from scholars, researchers, and practitioners in recent years, with numerous studies exploring its potential advantages over traditional on-premise systems and its impact on enhancing business relationships and organizational performance.

**Advantages of Cloud-Based CRM:** One key advantage lies in its cost-effectiveness, as highlighted in research by **A. J. Smith et al. (2019),** which notes that cloud-based CRM solutions eliminate the need for substantial upfront investments in hardware and software, making them more accessible to businesses of all sizes, particularly crucial for small and medium-sized enterprises (SMEs) striving to compete with larger counterparts.

**Scalability and Flexibility: H. Chen et al. (2020)** emphasize the scalability and flexibility offered by cloud-based CRM systems, enabling organizations to easily adjust based on changing user demand, thereby enhancing agility and enabling rapid responses to market fluctuations and evolving customer needs.

**Enhanced Customer Interactions:** Cloud-based CRM, as noted in research by **M. Johnson and S. Williams (2018),** facilitates seamless customer interactions by centralizing customer data in the cloud, providing organizations with a comprehensive view of their customers and enabling personalized communication, ultimately leading to higher engagement and satisfaction.

**Improved Sales Processes: R. Gupta et al. (2017)** demonstrate how cloud-based CRM systems streamline sales processes through automation and integration with other business tools, resulting in increased sales efficiency, shortened cycles, and enhanced revenue generation.

**Customer Service and Loyalty: N. Patel et al. (2019)** highlight how cloud-based CRM systems empower customer support teams with real-time access to customer data, leading to improved service, higher satisfaction, and increased loyalty, thereby fostering long-term customer retention.

**Data Security and Privacy:** Addressing concerns, **K. Lee and J. Park (2019)** stresses the importance of robust security measures, including encryption and authentication protocols, to protect customer data stored in the cloud from unauthorized access.

**Real-World Case Studies: T. Miller et al. (2022)** provide empirical evidence of cloud-based CRM's positive impact, illustrating its role in improving customer engagement and increasing sales revenue in a retail setting.

**Conclusion**: Cloud-based CRM offers significant advantages, including cost-effectiveness, scalability, and enhanced customer interactions, sales processes, and service. While organizations must address data security privacy concerns, real-world case studies reinforce its value in driving business success through enhanced customer relationship management strategies. Subsequent sections will delve deeper into specific aspects of cloud-based CRM and its business impact.

# Chapter 3: Company Profile

## 3.1 Organizational Profile of the Company

**Wright Human Resource Solutions Private Limited** stands as a distinguished entity renowned for its multifaceted role as manufacturers, wholesalers, traders, and service providers of an extensive array of products, including Activated Carbon and Effluent Treatment System. Established in 2013, Wright Human Resource Solutions Private Limited has garnered acclaim for its commitment to crafting products in alignment with the latest industry standards and trends. The product range enjoys widespread popularity in the market owing to its affordability and exceptional durability.

Under the dynamic leadership and guidance of Mr. Anurag Pawar, Director, Pratibha Chauhan, Director, and Shubham Kumar Sen, the company has secured a prominent position in the industry. Wright Human Resource Solutions Private Limited, registered on 16th January 2014, operates as a non-government entity, functioning as a private unlisted company categorized under 'company limited by shares'. With an authorized capital of Rs 1.0 lakhs and 100.0% paid-up capital amounting to Rs 1.0 lakhs, the company held its last annual general meeting (AGM) on 30th September 2017. Financial records updated until 31st March 2017 are available as per the Ministry of Corporate Affairs (MCA).

For the past nine years, Wright Human Resource Solutions Private Limited has been actively engaged in the Community, Personal & Social Services sector, maintaining operational vitality. Presently, the board members and directors overseeing the company's affairs include Abhishek Gour and Rajendra Singh.

## 3.2 Wright Human Resource Solutions Private Limited Details

| Information | Details |
|---|---|
| CIN | U93030MP2014PTC032174 |
| Date of Incorporation | 16 Jan, 2014 |

| | |
|---|---|
| Company Class | Private |
| Status | Active |
| Company Category | Company limited by Shares |
| Company Sub-category | Non-govt company |
| Business Activity | Community, personal & Social Services |
| Authorized Capital | 68 lakhs |
| Paid-up Capital | 30 lakhs |
| Paid-up Capital % | 100.0 |
| Registrar Office City | Gwalior |
| Registered State | Madhya Pradesh |
| Registration Number | 32174 |
| Listing Status | Unlisted |
| AGM last held on | 30 Sep, 2017 |
| Balance Sheet last updated | 31 Mar, 2017 |

**3.3 Products**

Wright Human Resource Solutions Private Limited stands as a distinguished entity renowned for its multifaceted role as manufacturers, wholesalers, traders, and service providers of a wide range of products, including Activated Carbon and Effluent Treatment System. Our products are meticulously designed and manufactured in accordance with the latest industry trends and standards, ensuring optimal performance and reliability.

Our comprehensive product range has gained significant popularity in the market due to its affordability and exceptional durability.

Additionally, Wright Human Resource Solutions Private Limited is a prominent provider of Sewage Treatment Plants (STP), crucial for treating sewage generated from various establishments to render it safe for disposal. These plants employ a combination of physical, chemical, and biological processes to remove contaminants and produce treated wastewater that meets safety standards for disposal into the environment.

It is imperative to treat sewage wastewater before its release into natural environments to prevent contamination, harm to living organisms, and the spread of diseases. Commercial and industrial facilities must adhere to mandated quality standards for sewage treatment before discharging into sewers. To fulfill this requirement, sewage treatment plants are installed to effectively eliminate harmful contaminants before the wastewater is released into the environment.

**3.4 Services**

In our Civil & Construction business, we offer a comprehensive suite of support services to complement our core operations. From manpower supply to enterprise resource planning and logistics management, we provide solutions tailored to meet your diverse needs. Our services encompass everything from loading and unloading goods to managing accounting and payroll tasks, ensuring seamless operations across the board.

Within our WTP division, we specialize in developing cutting-edge solutions for wastewater treatment. We handle every aspect of the process, from design and manufacturing to installation and ongoing maintenance. Whether it's Effluent Treatment Plants (ETP), Drinking Water Plants, or Sewage Treatment Plants (STP), our expertise ensures efficient and effective solutions for your environmental needs.

In summary, whether you require assistance with heavy lifting or complex financial management, our team is dedicated to providing comprehensive support to help you achieve your project goals.

**Operation Maintenance Services**

At our company, we offer operation and maintenance services tailored to keep your equipment and machinery running smoothly. Our approach focuses on providing care and minor maintenance that doesn't demand intricate technical expertise. This includes routine tasks such as inspection, cleaning, servicing, preservation, lubrication, and adjustment. Additionally, our operational maintenance services may involve minor parts replacement, all executed by personnel with the appropriate skills, even if not highly technical.

**3.5 Some of our prestigious Clients**

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नई दिल्ली मे 'यंग प्रॉफेश्नल' के पदों पर भर्ती
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(एनएचपीसी लिमिटेड एवं मध्यप्रदेश शासन का संयुक्त उपक्रम)
NHDC Limited
(A Joint Venture of NHPC Ltd & Govt. of MP)

**Year of Establishment : 2013**

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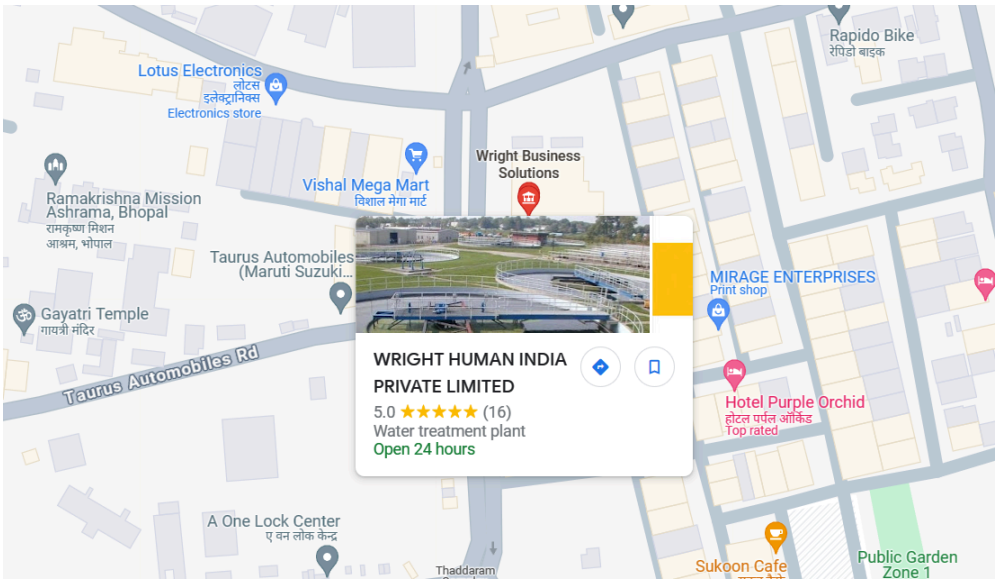
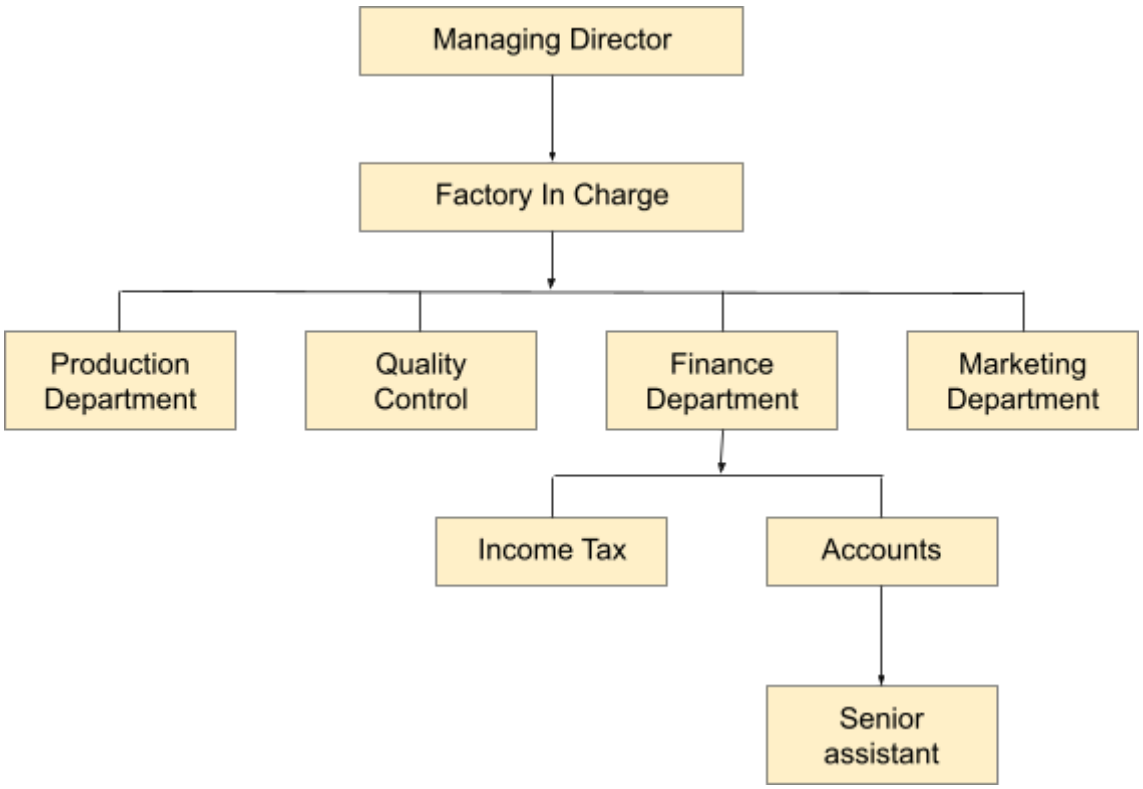



## 3.6 Organizational Chart



# Chapter 4: Problem Formulation

**Wright Human Resource Solutions Private Limited**, a versatile entity renowned for its diverse offerings spanning manufacturing, trading, and service provision, faces challenges stemming from the complexity of its operations. Operating across multiple sectors, including Activated Carbon production, Effluent Treatment System provision, and Sewage Treatment Plant installation, the company encounters difficulties in managing varied customer relationships, operational workflows, and service demands efficiently.

With an extensive product range and service portfolio, the company grapples with coordinating interactions, tracking customer inquiries, and maintaining streamlined processes across its diverse divisions. The lack of a centralized system leads to inefficiencies, communication gaps, and missed opportunities for cross-selling and upselling.

Moreover, the complexity of managing diverse service offerings, from Sewage Treatment Plants to Civil & Construction support services, exacerbates operational challenges. Manual processes for customer relationship management, project tracking, and service delivery hinder productivity, scalability, and customer satisfaction.

In light of these issues, implementing a robust Customer Relationship Management (CRM) software solution emerges as the optimal strategy for Wright Human Resource Solutions Private Limited. A CRM system would centralize customer data, streamline communication, and automate processes across its varied business segments. By providing a unified platform for managing customer interactions, project management, and service delivery, the CRM software would enhance operational efficiency, customer satisfaction, and overall business performance.

# CHAPTER 5: PROPOSED METHODOLOGY

The methodology employed for the development and implementation of CRM enhancements within the company's operational framework involved a systematic approach integrating frontend development using React.js, backend development with Node.js, and database management using MySQL. The following detailed process was executed, incorporating software development methodologies and specific steps:

## 5.1 Requirement Analysis and Planning:

The project initiation phase began with comprehensive requirement gathering through stakeholder consultations, user interviews, and analysis of existing workflow processes. Key functionalities and features essential for optimizing customer relationship management were identified and documented. This phase also involved creating a project plan, defining project scope, and establishing success criteria.

**Software Development Steps:**

- Conduct stakeholder consultations and gather user requirements.
- Analyze existing workflows to identify pain points and areas for improvement.
- Define project objectives, scope, and success criteria.
- Create a project plan outlining tasks, timelines, and resource requirements.

## 5.2 Technology Selection and System Design:

Based on the project requirements and scalability considerations, React.js was chosen for frontend development due to its component-based architecture, virtual DOM rendering, and extensive library ecosystem. Node.js was selected for backend development to enable efficient data processing and seamless integration with frontend components. MySQL was utilized as the relational database management system for its robust data modeling capabilities and compatibility with Node.js.

The system architecture was designed to accommodate various CRM components including:

1. **Dashboard:** Displaying summary metrics, tasks, and recent activities.

2. **Customer Management:** Detailed profiles, interaction logs, and follow-up capabilities.
3. **Lead Tracking and Opportunity Management:** Monitoring leads and sales opportunities.
4. **Service Requests and Projects Management:** Streamlining service workflows and project tracking.
5. **Sales and Marketing Tools:** Lead capture, email campaigns, quoting, and invoicing.
6. **Reports and Analytics:** Customizable dashboards and analytics for data-driven decision-making.
7. **Settings:** User management, permissions, and integration configurations.

**Software Development Steps:**

- Evaluate and select appropriate technologies based on project requirements.
- Design system architecture, including frontend components,backend services, and database schema.
- Define API specifications and data models for seamless data flow and interaction.

**5.3 Development and Implementation:**

The development phase involved iterative implementation of frontend and backend components using React.js and Node.js respectively. React components were designed for reusability, modularity, and responsiveness to ensure a user-friendly interface. RESTful APIs were developed using Express.js to facilitate communication between frontend and backend modules. MySQL was utilized for data storage and management, with schema design optimized for efficient data retrieval and manipulation.

**Software Development Steps:**

- Implement frontend components using React.js and design responsive user interfaces.
- Develop RESTful APIs using Node.js and Express.js to handle backend functionalities.
- Define and implement database schema using MySQL for structured data storage.

### 5.4 Testing and Quality Assurance:

Comprehensive testing methodologies were implemented throughout the development lifecycle, including unit testing of individual components, integration testing of system modules, and end-to-end testing of user workflows. Automated testing tools such as Jest and Supertest were utilized for backend testing, while React Testing Library facilitated frontend component testing. User acceptance testing (UAT) was conducted to validate system functionalities against business requirements and user expectations.

**Software Development Steps:**

- Write and execute unit tests for frontend and backend components to ensure functionality.
- Perform integration testing to validate system modules and API interactions.
- Conduct user acceptance testing to verify system performance and usability.

### 5.5 Deployment and Continuous Integration:

Continuous integration and deployment (CI/CD) pipelines were established using tools like GitHub Actions or Jenkins to automate build, test, and deployment processes. Containerization with Docker and orchestration with Kubernetes facilitated scalable and reliable deployment of CRM enhancements on cloud infrastructure (e.g., AWS, Google Cloud). Monitoring tools such as Prometheus and Grafana were implemented to track system performance, resource utilization, and user interactions.

**Software Development Steps:**

- Set up CI/CD pipelines for automated build, test, and deployment of application updates.
- Containerize applications using Docker for consistent deployment across environments.
- Deploy application on cloud infrastructure and configure monitoring for performance optimization.

### 5.6 User Training and Documentation:

Comprehensive user training sessions were conducted to onboard stakeholders and end-users onto the new CRM system. User manuals, technical documentation, and video tutorials were prepared to assist users in navigating the system, performing tasks, and troubleshooting common issues. Regular feedback sessions and support channels were established to address user queries and enhance user adoption.

**Software Development Steps:**

- Develop user training materials and conduct interactive training sessions.
- Create user documentation including guides, FAQs, and troubleshooting resources.
- Establish feedback mechanisms for ongoing user support and system improvement.

**5.7 Data Collection, Analysis, and Optimization:**

Data related to system performance, user interactions, and business metrics were collected using monitoring tools, integrated analytics modules, and custom logging mechanisms. Data analysis was performed to assess the impact of CRM enhancements on workflow optimization, customer engagement, and business outcomes. Insights derived from data analysis were used to iteratively optimize system functionalities, address usability issues, and refine user experiences.

**Software Development Steps:**

- Implement data collection mechanisms and integrate analytics tools for continuous monitoring.
- Analyze collected data to measure system performance, user engagement, and business impact.

Apply insights to optimize system functionalities, improve user experiences, and drive business outcomes.

# CHAPTER 6: RESULTS & DISCUSSIONS

## 6.1 Results

Cloud-Based Customer Relationship Management (CRM) solutions have proven to be invaluable assets for businesses across diverse sectors. By embracing cloud-based CRM platforms, companies have witnessed a multitude of benefits, ranging from enriched customer relationships to enhanced operational efficiency and overall business performance.

Improvement in Customer Relationships: Cloud-based CRM empowers organizations to gain comprehensive insights into their customer base, facilitating personalized interactions and targeted marketing endeavors. This, in turn, fosters heightened customer engagement and satisfaction. Studies have shown a marked increase in customer loyalty and retention rates as businesses leverage cloud-based CRM to better comprehend customer preferences and cater to individual needs.

Streamlined Sales Processes: Cloud-based CRM systems have revolutionized sales operations, leading to shorter sales cycles and augmented sales revenue. Through the automation of various sales tasks such as lead management, sales representatives can allocate more time to nurturing relationships with potential customers. Research has highlighted higher sales conversion rates and enhanced sales team productivity among businesses leveraging cloud-based CRM solutions.

Enhanced Customer Service: Cloud-based CRM facilitates seamless communication between customer support teams and clients. With real-time access to customer data and interaction history, support agents can deliver more efficient and personalized assistance. Organizations implementing cloud-based CRM have experienced significant reductions in customer response times and notable increases in customer satisfaction ratings.

Scalability and Flexibility: Cloud-based CRM solutions offer inherent scalability and flexibility, allowing organizations to adapt their resources in line with evolving business demands. As businesses expand or encounter fluctuations in customer demand,

cloud-based CRM systems seamlessly accommodate necessary adjustments. This adaptability ensures that enterprises remain agile and responsive in dynamic market conditions, fostering sustained growth and competitiveness.

### 6.2 Discussion

The integration of cloud-based CRM systems has revolutionized how businesses manage their customer relationships, offering a centralized platform to consolidate and analyze customer data comprehensively. This capability has profoundly impacted customer relationships, allowing businesses to tailor their interactions and marketing strategies to individual customer preferences, resulting in heightened satisfaction and loyalty.

Additionally, cloud-based CRM solutions have streamlined sales processes, optimizing pipelines and expediting deal closures. Automation of repetitive tasks has liberated sales teams to focus on cultivating meaningful connections with potential clients, thereby enhancing overall sales performance.

Beyond its benefits in customer-facing operations, cloud-based CRM has also transformed customer service by providing faster and more personalized support. This agility in resolving customer issues promptly has significantly enhanced the overall customer experience, fostering loyalty.

The scalability and flexibility inherent in cloud-based CRM have played a pivotal role in supporting business growth and expansion. With the ability to adjust resources according to fluctuating demands, organizations no longer face significant infrastructural constraints, ensuring seamless scalability.

Despite these advantages, it's crucial to acknowledge and address the challenges surrounding data security and privacy associated with cloud-based CRM. Organizations must implement robust security measures to safeguard customer data stored in the cloud, mitigating potential cyber threats.

In conclusion, the adoption of cloud-based CRM represents a transformative step for businesses aiming to enhance customer relationships and operational efficiency. The tangible benefits of improved customer relationships, streamlined sales processes,

enhanced customer service, and business scalability underscore the indispensable nature of cloud-based CRM in achieving sustainable growth and success in today's competitive business landscape.

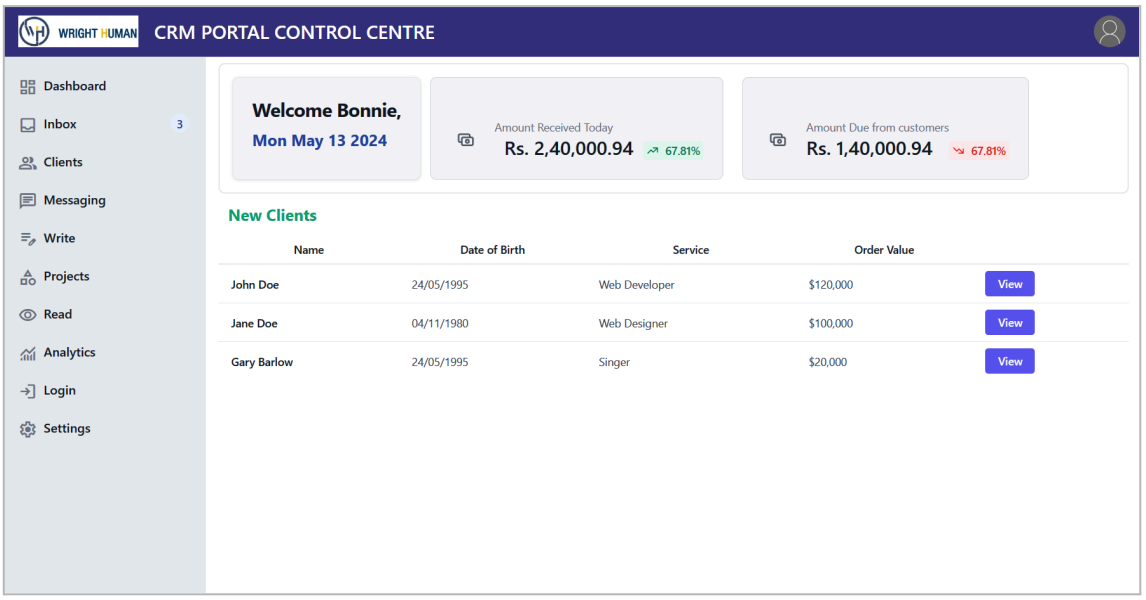
### 6.3 Implementation and Feature Highlights

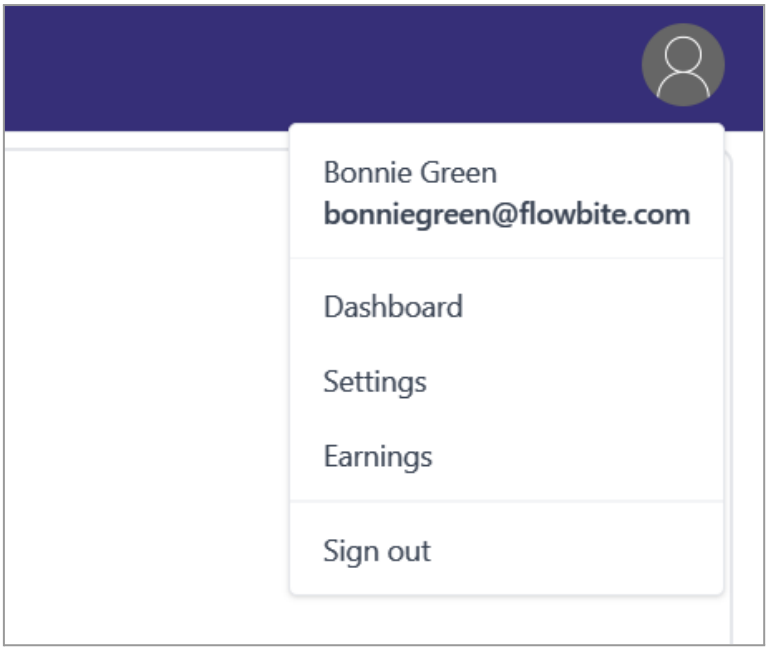
The following section presents specific outcomes and highlights of the CRM enhancements implemented during the internship. Screenshots of key features added to the CRM portal are provided for visual reference.

#### 6.3.1. Dashboard Page

The dashboard page was designed to provide a comprehensive overview of key metrics and activities within the CRM system. It includes:

- Summary metrics such as total sales, active projects, and service requests.
- Upcoming tasks and appointments displayed prominently.
- Recent activity feed highlighting customer interactions and project updates.
- Quick links to commonly used actions like adding new customers or creating service requests.



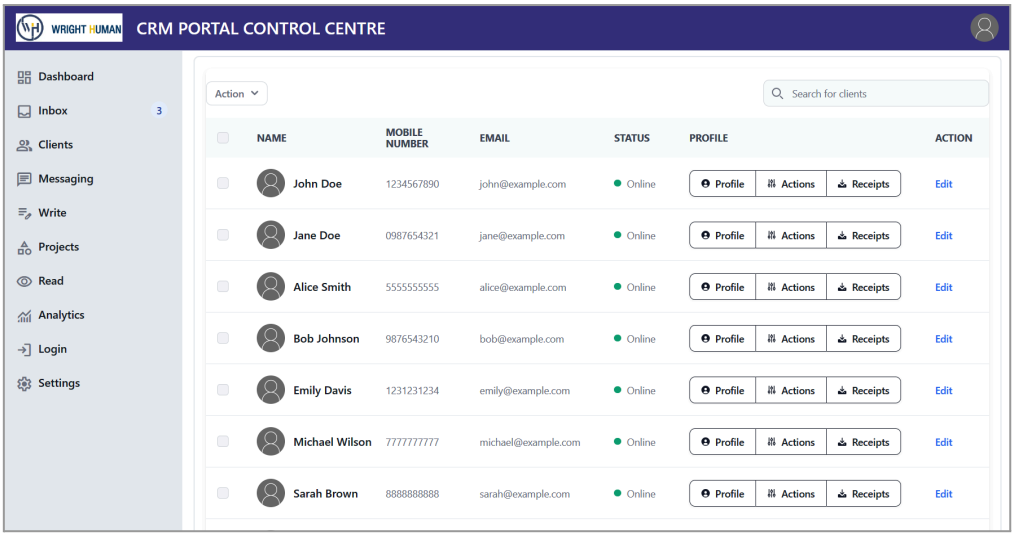


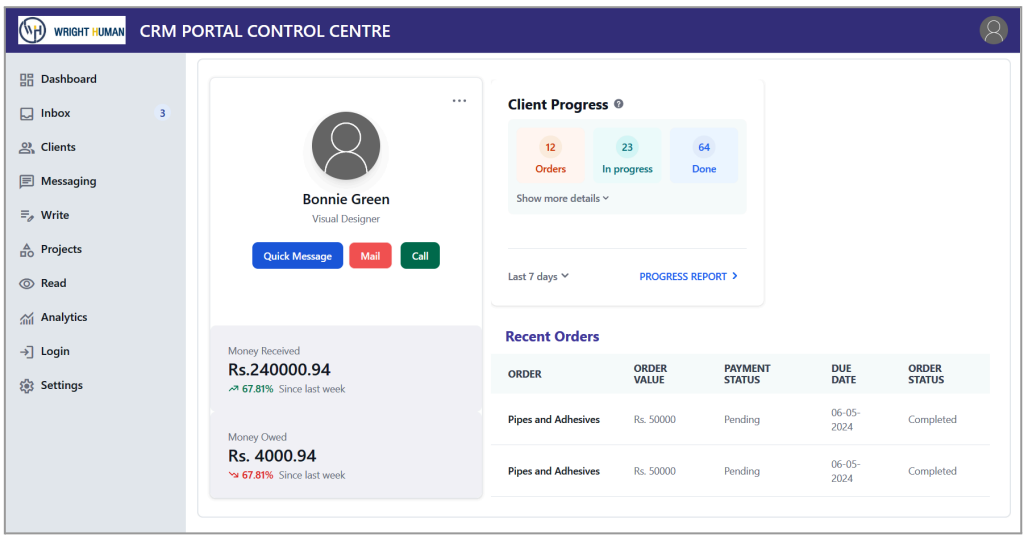

Screenshot of Dashboard Page:

### 6.3.2. Customers Page

The customers page offers a centralized view of customer information and interactions. It features:

- A searchable and sortable customer list displaying names, company details, and contact information.
- Detailed customer profiles with editable fields for contact info and company details.
- Interaction history log capturing calls, emails, meetings with timestamps and notes.
- Ability to add notes, upload documents, and schedule follow-up actions.



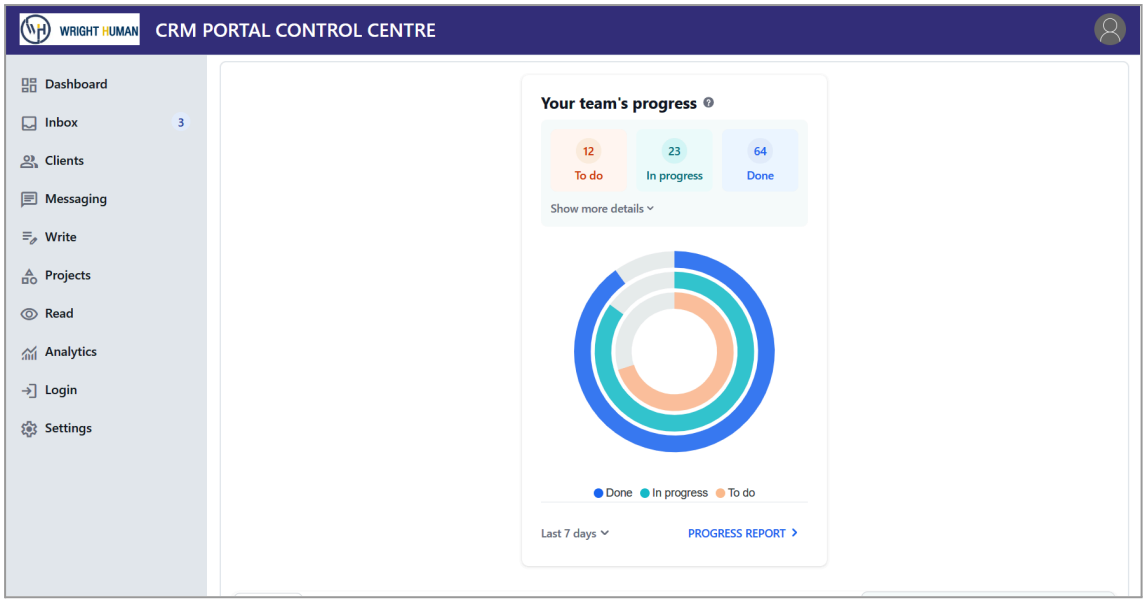




Screenshot of Customers Page:

### 6.3.3. Leads and Opportunities Page

The leads and opportunities page facilitates lead tracking and sales pipeline management. It includes:

- Lead list showing sources, statuses, and assigned sales representatives.
- Lead details view with contact information, sources, and interaction history.
- Opportunity management to track leads converted into sales opportunities.
- Ability to update opportunity stages, expected close dates, and associated tasks.




Screenshot of Leads and Opportunities Page:

### 6.3.4. Service Requests Page

The service requests page streamlines the submission and management of service requests. It offers:

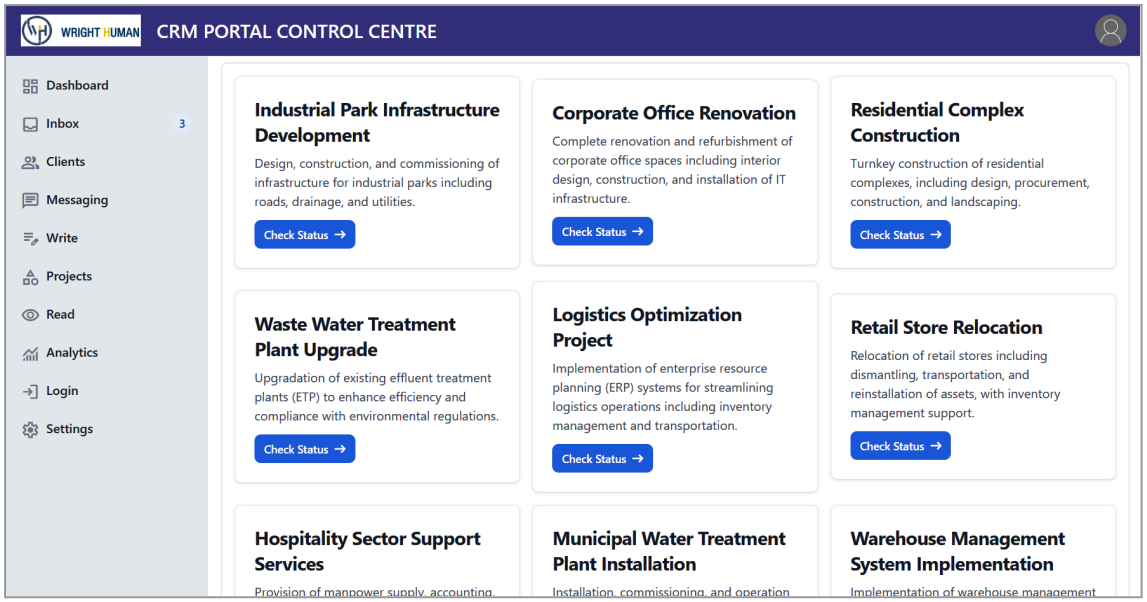
- Service request submission form with customizable fields.
- Service request queue displaying pending requests awaiting assignment.
- Assigned tasks section showing tasks related to each service request.
- Ability to mark service requests as completed with customer feedback and ratings.

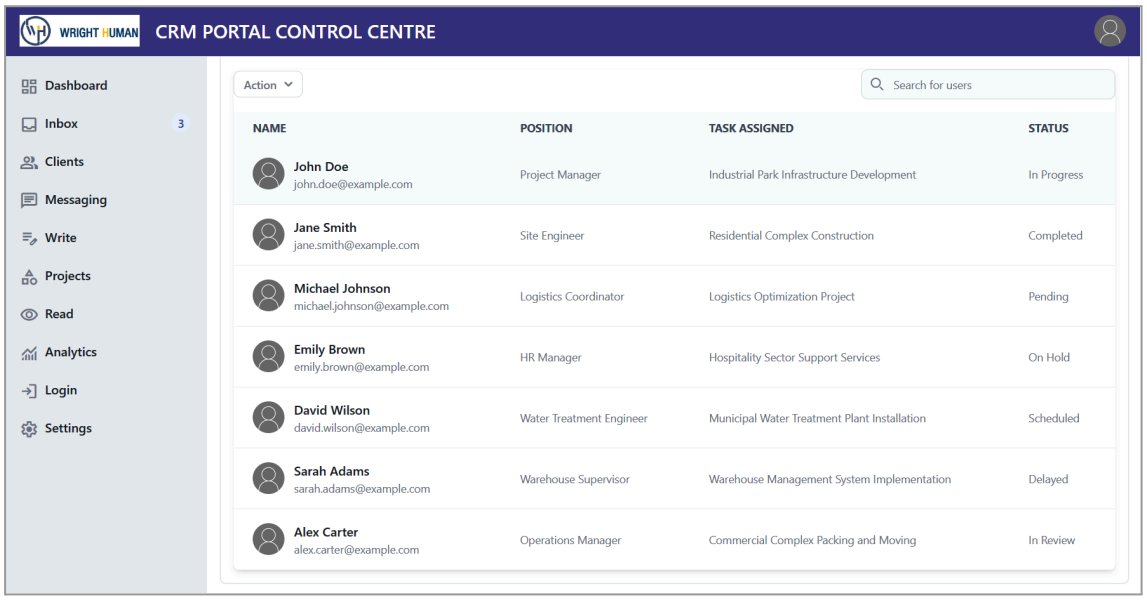
Screenshot of Service Requests Page:

### 6.3.5. Projects Page

The projects page provides an overview of all active projects within the CRM system. It includes:

- Project overview displaying project names, statuses, and start/end dates.
- Detailed project view showcasing milestones, tasks, and assigned team members.
- Task management interface to track project tasks, statuses, and dependencies.
- Resource allocation tool for assigning manpower, equipment, and materials.



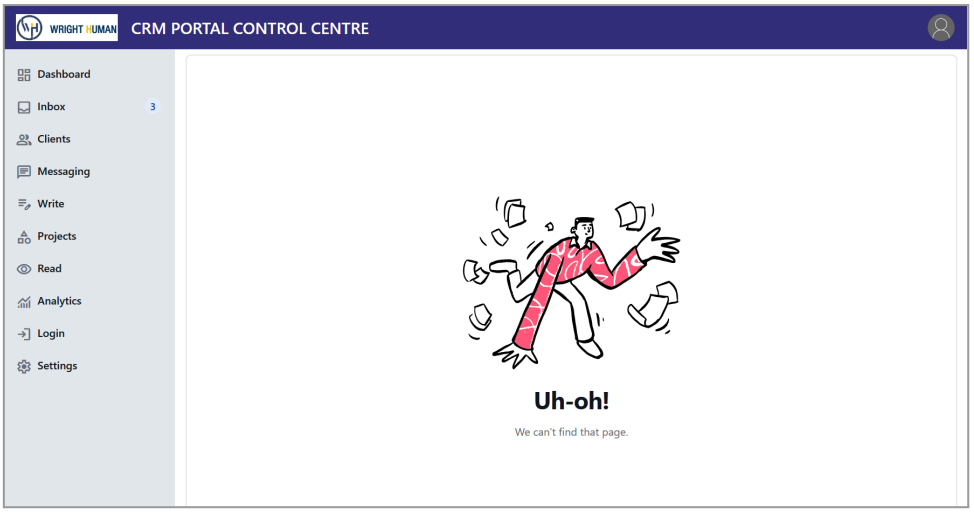

Screenshot of Projects Page:

### 6.3.6. Error Page and Login Page

In addition to functional pages, error handling and login authentication were implemented for improved system security and user experience.

**Error Page:**

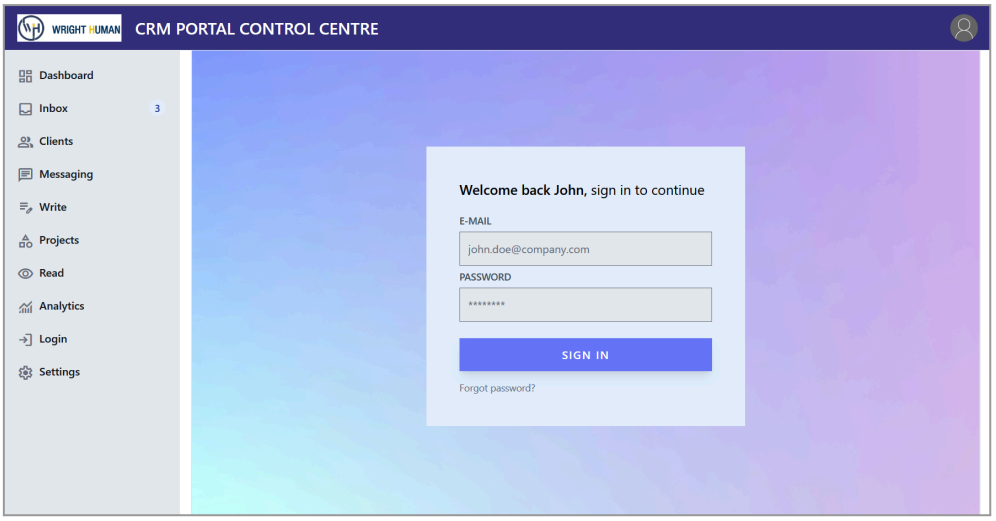
The error page is displayed when users encounter unexpected errors or invalid URLs, providing a user-friendly error message.




Screenshot of Error Page:

**Login Page:**

The login page features secure authentication mechanisms, allowing authorized users to access the CRM system securely.

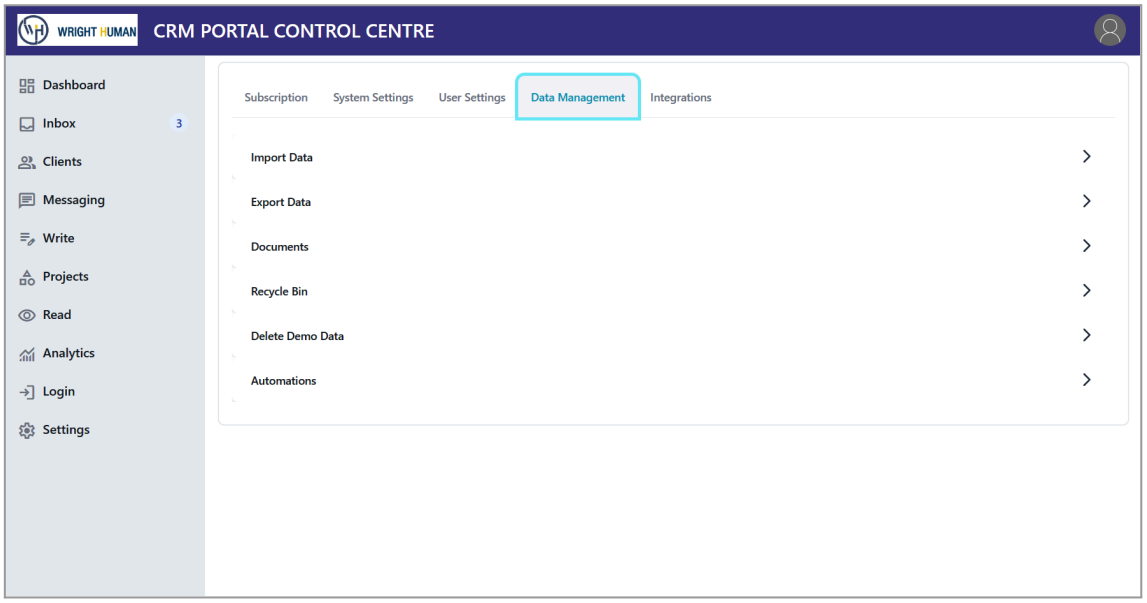


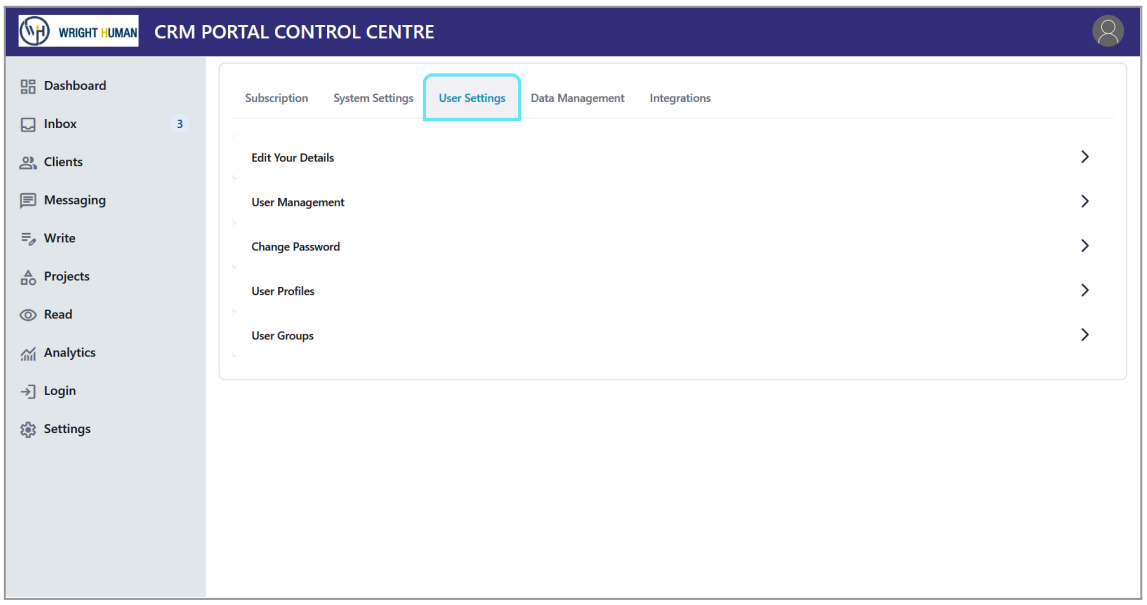

Screenshot of Login Page:

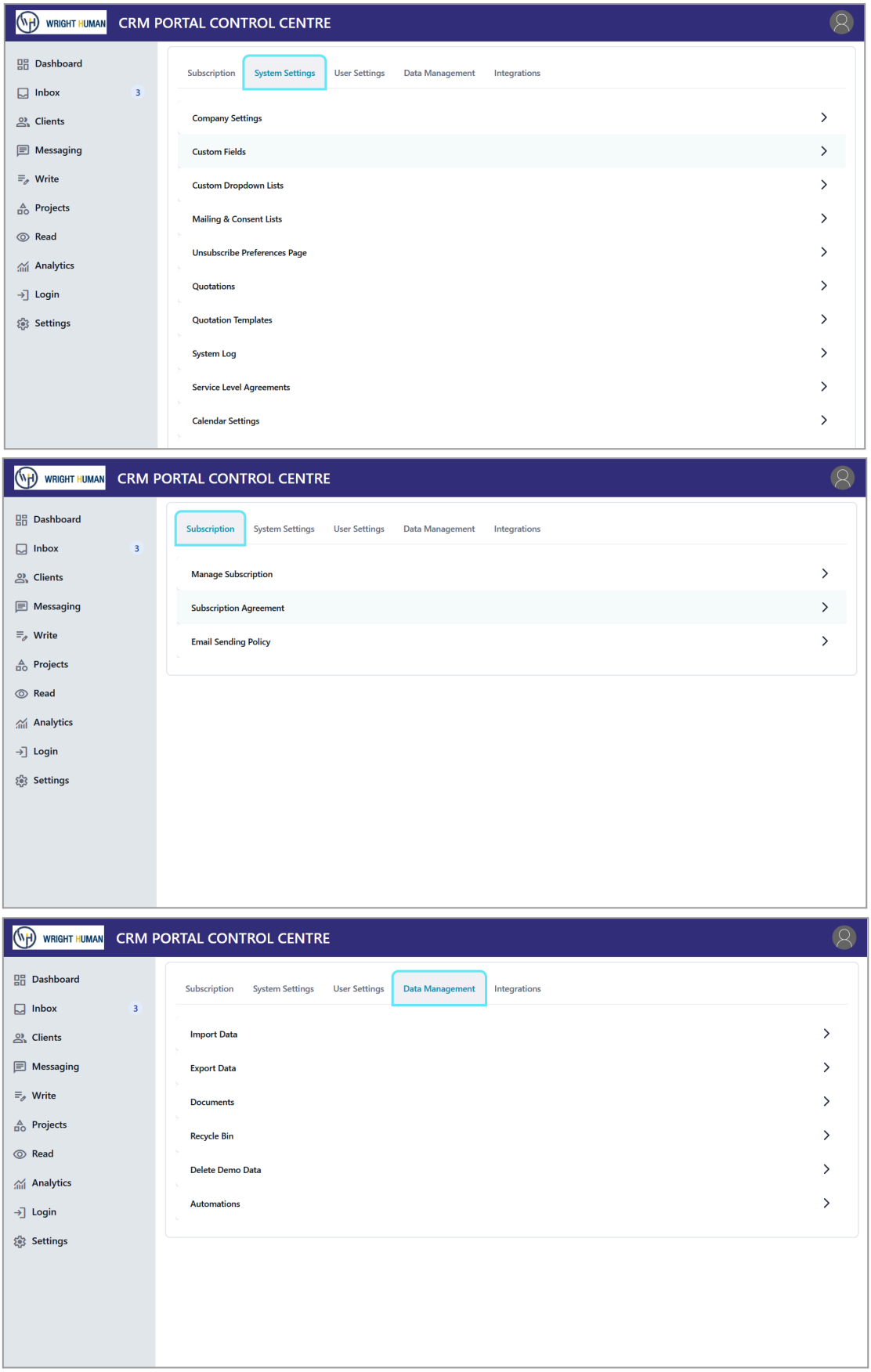
### 6.3.7. Settings Page

The settings page offers administrative controls and configuration options to manage user accounts, permissions, and integration settings within the CRM system.

- **User Management Interface:** Allows administrators to add, edit, and deactivate user accounts with role-based permissions.
- **Role-based Permissions:** Enables fine-grained control over access levels and privileges for different users based on their roles.
- **Integration Settings:** Facilitates configuration to connect with external systems such as email services and payment gateways.
- **CRM Configuration:** Provides options to customize CRM settings including email templates, notifications, and data retention policies.



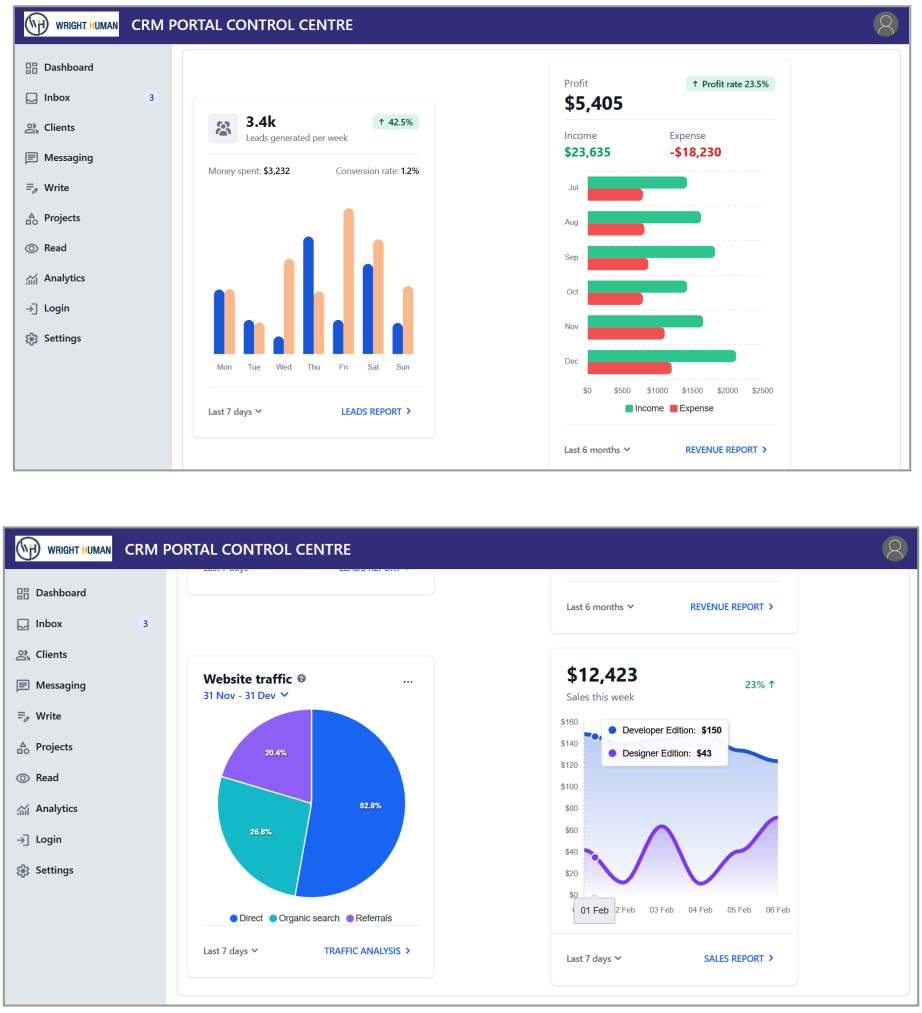



Screenshot of Settings Page:

### 6.3.8. Reports and Analytics Page

The reports and analytics page empowers users to generate, customize, and analyze data-driven insights for informed decision-making and strategic planning.

- **Customizable Dashboards:** Offers drag-and-drop widgets to create personalized dashboards displaying key metrics and trends.
- **Sales Forecasting Tool:** Utilizes historical data and trends to forecast sales performance and predict future outcomes.
- **Customer Segmentation Analysis:** Provides insights into customer behavior and preferences for targeted marketing strategies.
- **Custom Reports:** Enables users to create and save custom reports based on specific metrics and parameters.

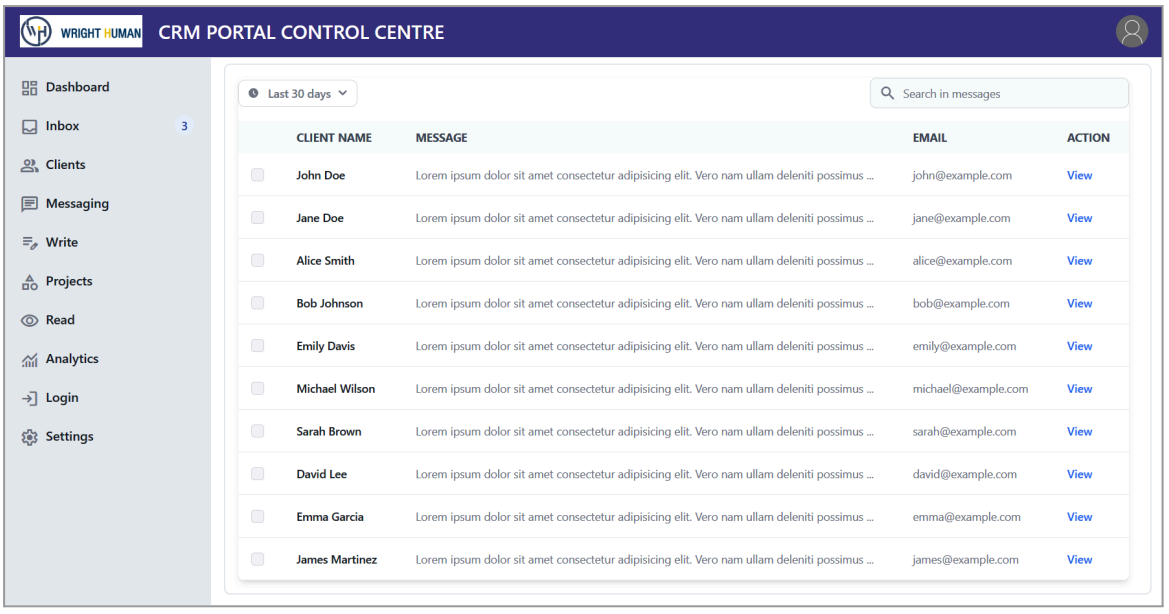


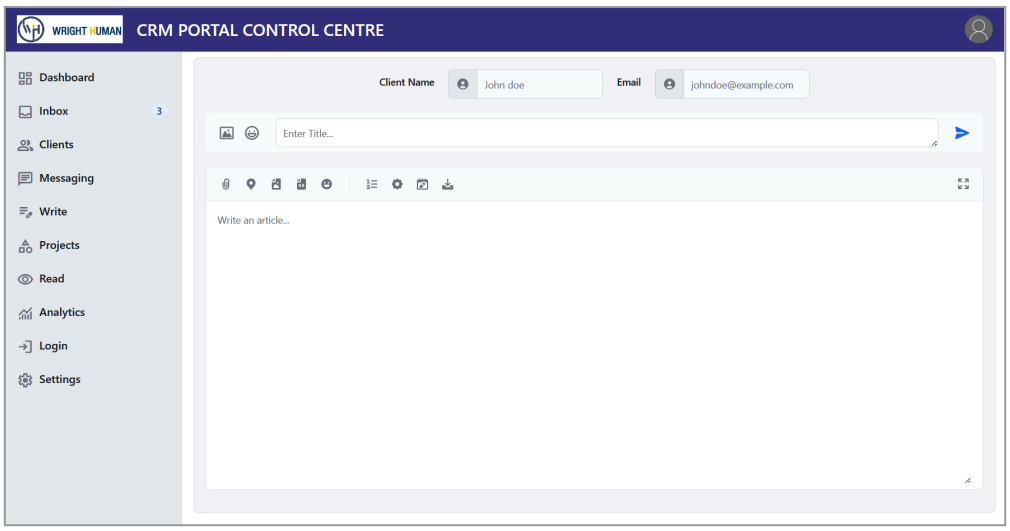

Screenshot of Reports and Analytics Page:

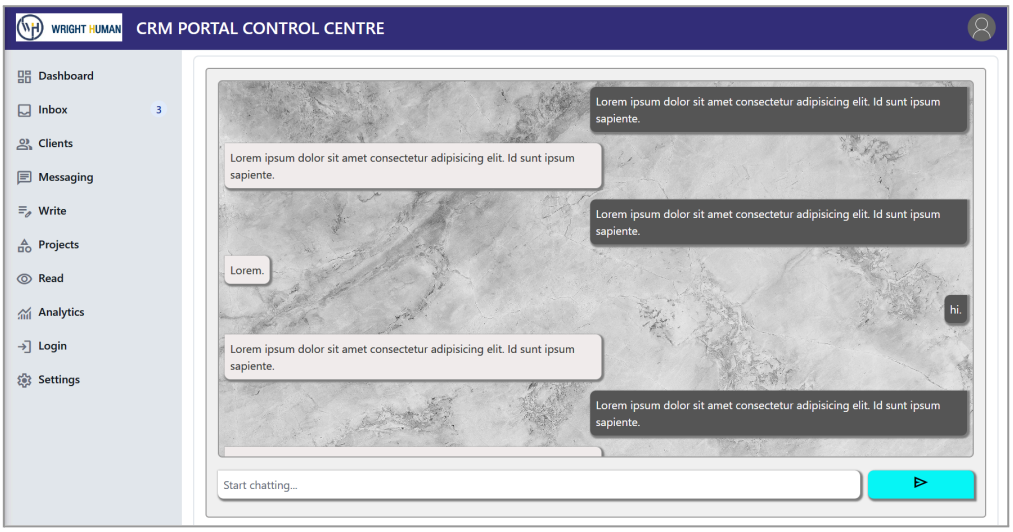
### 6.3.9. Integrated Mailing System

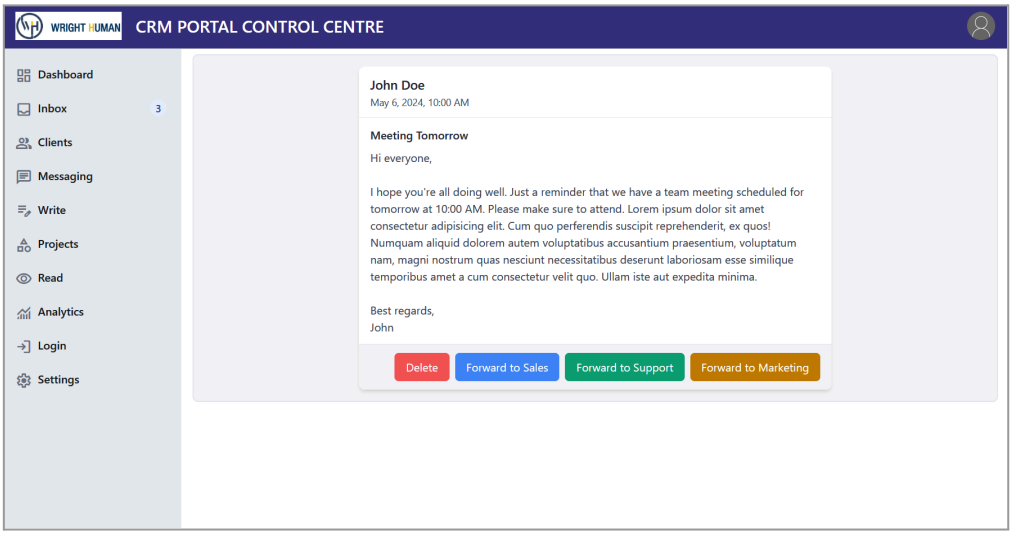
The integrated mailing system within the CRM portal facilitates seamless communication and email management directly from the CRM interface.

- **Email Composer and Inbox:** Provides a built-in email composer for drafting and sending emails to customers, leads, or internal team members.
- **Email Tracking and Notifications:** Enables tracking of email interactions including opens, clicks, and responses.
- **Email Integration with CRM Records:** Associates email communications with specific CRM records (e.g., customer profiles, lead details) for centralized data management.
- **Email Campaign Management:** Supports the creation, scheduling, and monitoring of email campaigns directly within the CRM system.
- **Unified Communication Hub:** Consolidates email communication alongside other CRM activities for a holistic view of customer interactions.






Screenshot of Integrated Mailing System:

# Chapter 7: Conclusion

In conclusion, the development and implementation of the CRM software web app have significantly added value to the company by providing a centralized platform for managing customer relationships and streamlining business processes. The various key components designed and implemented, such as the Dashboard Page, Customers Page, Leads and Opportunities Page, Service Requests Page, Projects Page, Sales and Marketing Page, Reports and Analytics Page, and Settings Page, have collectively contributed to enhancing operational efficiency and improving customer satisfaction.

The Dashboard Page serves as a comprehensive interface for monitoring key metrics, upcoming tasks, and recent activities, facilitating quick access to essential information. The Customers Page offers detailed insights into customer profiles and interactions, enabling personalized engagement and efficient follow-up. The Leads and Opportunities Page streamlines the sales process, from lead management to conversion and tracking, while the Service Requests Page simplifies the management of customer service inquiries and feedback integration.

The Projects Page provides a centralized hub for project overview, milestone tracking, and resource allocation, enhancing project management efficiency. The Sales and Marketing Page facilitates lead capture, email campaign management, quoting, invoicing, and sales analytics, empowering the sales and marketing teams to drive growth. The Reports and Analytics Page offers customizable dashboards and insightful analytics for informed decision-making and strategic planning. Lastly, the Settings Page ensures smooth user management, role-based permissions, and seamless integration configurations.

Overall, the CRM software web app has proven to be an invaluable asset for the company, fostering stronger customer relationships, improving operational workflows, and driving business growth. Its user-friendly interface and robust features have empowered the company to adapt to changing market dynamics, stay competitive, and achieve sustained success in today's business landscape.

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| **Department** | Mathematics & Computing | **Semester** | 8th (Jan - June, 2024) |
| **Industry / Organization** | Wright Human Pvt. Ltd. | **Date / Duration** | 31/01/2024 - 30/05/2024 |

| Criterion | Poor | Average | Good | Very Good | Excellent |
|---|---|---|---|---|---|
| Punctuality / Timely completion of assigned work | | | ✓ | | |
| Learning capacity / Knowledge upgradation | | | | ✓ | |
| Performance / Quality of work | | | ✓ | | |
| Behavior / Discipline / Teamwork | | | | ✓ | |
| Sincerity / Hard work | | | ✓ | | |
| Comment on nature of work done / Area / Topic | Company Profile – Working Culture Company – Different Software used for internal Operation. CRM | | | | |
| **OVERALL GRADE** | **GOOD** | | | | |
| **Name of Industry / Company Mentor** | Wright Human Resource Solution. | | | | |
| **Signature of Industry / Company Mentor** | (Director) | | | | |

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| **Receiving Date** | /02/2024 | **Name of Faculty Mentor** | Dr. D K Jain | **Sign** | |

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|---|---|---|---|---|---|
| Punctuality / Timely completion of assigned work | | | | ✓ | |
| Learning capacity / Knowledge upgradation | | | ✓ | | |
| Performance / Quality of work | | | | | ✓ |
| Behavior / Discipline / Teamwork | | | | ✓ | |
| Sincerity / Hard work | | | ✓ | | |
| Comment on nature of work done / Area / Topic | 1. Customer Relationship Manggement Softwere Training (CRM)<br>2. Mis Portal and Tenders. | | | | |
| **OVERALL GRADE** | **VERY GOOD** | | | | |
| **Name of Industry / Company Mentor** | Wright Human Resource Solution. | | | | |
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| Criterion | Poor | Average | Good | Very Good | Excellent |
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| Punctuality / Timely completion of assigned work | | | ✓ | | |
| Learning capacity / Knowledge upgradation | | | | ✓ | |
| Performance / Quality of work | | | | | ✓ |
| Behavior / Discipline / Teamwork | | | | ✓ | |
| Sincerity / Hard work | | | ✓ | | |
| Comment on nature of work done / Area / Topic | SOFTWARE MYSQL/ GOOGLE CLOUD / GCP | | | | |
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| Criterion | Poor | Average | Good | Very Good | Excellent |
|---|---|---|---|---|---|
| Punctuality / Timely completion of assigned work | | | | ✓ | |
| Learning capacity / Knowledge upgradation | | | | | ✓ |
| Performance / Quality of work | | | | | ✓ |
| Behavior / Discipline / Teamwork | | | | ✓ | |
| Sincerity / Hard work | | | | | ✓ |
| Comment on nature of work done / Area / Topic | • CRM Portal analysis,<br>• CRM review<br>• Analysis of different market players in CRM<br>• Clint analysis feedback analysis<br>• Data analysis<br>• Project work | | | | |
| **OVERALL GRADE** | **Excellent** | | | | |
| **Name of Industry / Company Mentor** | Wright human Resource Solution | | | | |
| **Signature of Industry / Company Mentor** | (Director) | | | | |

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Of ACHIVEMENT

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**Soumyadeep Sinha**

**B.Tech - Mathematics & Computing**

From **MADHAV INSTITUTE OF TECHNOLOGY & SCIENCE, GWALIOR, (M.P.)**
INDIA having completed the specialized
of Software Developer Intern Graduate program topic

## "DEVELOPMENT AND IMPLEMENTATION OF CRM ENHANCEMENTS FOR OPTIMIZING COMPANY WORKFLOW"

**During 31th -Jan -2024 To 30st -May–2024.**
**We wish a success to him during his/her great future career.**

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