PROJECT MANAGEMENT IN SALESFORCE

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ABSTRACT

Any organization's primary asset is Salesforce. Given that a control system directs the actions of the salesforce, it is crucial to understand how the salesforce is affected by the control system. By offering a thorough analysis based on research published in the field of salesforce control system in the previous 43 years (1975-2018), this study adds to the body of knowledge on the subject. Examining historical developments in the field of salesforce control system research with regard to research emphasis, research methodology, research type, geographical location, etc. is the goal of this review. The majority of the research we reviewed came to the conclusion that the behaviour-based and outcome-based salesforce control systems had differing effects on salesforce characteristics, sales territory design, salesforce performance, and the efficiency of the sales organization. For sales companies, the report has significant ramifications.

1.1. INTRODUCTION:

In many businesses, the sales team's interactions with consumers are the most crucial to developing lucrative business connections and agreements. Sales team employees often engage in business with clients initially, so the impression they make is important. This crucial element, which has an impact on the value that consumers receive from each transaction, contributes to the sales force's level of satisfaction. People prefer to discuss their bad experiences with one another more frequently than their positive ones, therefore having ineffective employees and unmotivated employees can have a detrimental impact on the company's overall reputation. improving sales force management to ensure that salespeople are adequately motivated and trained for efficiency and effectiveness. Success of a firm in a cutthroat economy depends on how well the sales staff builds and maintains connections with customers. Since the salesperson is the one who communicates information to the consumer, salespeople act as a personal link between any firm and its clients. In order to succeed in the market, a firm must carefully evaluate how to create and manage its sales staff. Salespeople and those in charge of them are aware that these changes have an impact on every facet of sales management, from the organization of the sales department to the hiring, development, and remuneration of specific salespeople. In order to redesign the sales organization, a number of essential difficulties have been discovered. Sales staff need training in order to comprehend their roles and carry them out more effectively. To lower the sales staff turnover ratio, motivational factors and an appropriate incentive structure must be provided. Another crucial component of sales force management is the processes for performance control and measurement.

The organization grows as a result of efficient resource and labor management. The management and upkeep of the sales staff will also lead to a rise in sales volume. The sales manager needs to consider the variables that affect the success of the sales team. In general, some elements will affect employee performance, but many other aspects will affect the performance, motivation, and happiness of the sales force. Before selecting the sales force for the firm, the sales manager must take into account job appraisal and job analysis. The demands of the work constantly affect the productivity and happiness of the sales force. Compensation plans are a key component of sales force management. What unique strategies must a business develop in order to draw in a sales force? Creating pay schemes that will reward employees and offer them a distinctive place in the company are crucial tasks. If you look at the current, the retention rate of the sales force is somewhat declining. Additionally, the sales force is living longer than it is being replaced. The corporation must thus create alluring remuneration programs for its sales team. According to many respondents, salespeople lack the temperament, ambition, and fundamental sales abilities they require. While respect, assistance, and counsel were expected of salespeople, the most desired qualities in salespeople were sincerity, truthfulness, and product and customer expertise.

2.1. OBJECTIVES OF SALES FORCE MANAGEMENT:

Finding out how well each salesperson has done is the fundamental goal of sales force management. However, the outcomes of salesperson performance reviews may be applied to many different aspects of sales management. To identify the unique coaching and training requirements for each salesperson as well as the overall sales. To offer data for efficient human resource planning, to pinpoint standards that can. To inform salespeople of job expectations, to be utilized to select and hire salespeople in the future Motivate salespeople,

assist them in creating professional objectives, and enhance their performance are all aims presentation. To find salespeople who might be promoted, to find salespeople whose employment should be terminated, to find salespeople whose employment should be terminated and to provide evidence to justify the reason for termination. selling power One of the key factors in the success of contemporary enterprises is management.

3.1. LITERATURE SURVEY:

Modern companies face a continually changing environment that compels them to alter and adapt in order to survive. Because firms face so much rivalry these days, it is difficult for them to stay ahead of the market just by enhancing the quality of their product or lowering the price of their product. The only factor that may influence this is the company's salesforce. Salesforce is the most significant asset for the organization since it helps generate income, develop long-term relationships with clients, and promote the company's image. Organizations worldwide are aiming on efficiency, share price, revenues, market share, or profit to achieve success, which only salesforce can achieve.

The literature review is a textual and thorough investigation of the current body of literature that provides in-depth knowledge of the various ideologies, concepts, and facts necessary to draw pragmatistically valid conclusions and produce effective outcomes. The literature study is broken up into a number of sections that present a convincing picture of SME development and operation in the Indian economy. A flexible and skilled linking structure that ties its customers together, a process that is streamlined, and an increase in profitability are just a few of the other main problems that Indian SME's encounter in implementing an efficient CRM plan. The study also includes defining the key topics that are necessary in delivering thorough data for future investigation of the selected issue. The researcher has gathered and analyzed data from a range of primary and secondary sources, including newspapers, journals, websites, and other sources. Additionally, the chapter includes in-depth information regarding how software applications may strengthen the bond between a company's clients and itself. Additionally, the section was effective in pointing up the obvious gaps, which are reportedly the key success aspects of the current study. The finding of the gaps has, however, given the current study a practical component by identifying the common risk variables that might contribute to the study's failure to provide results.

India has been a major member of the emerging countries panel during the last several years, with a significant increase in economic growth and achieving significant heights of development. According to Aryan et al. (2017), a small to medium-sized firm (SME) is defined as an organization having at least 25% of its shares invested in the purchase of another business. SME has recently reduced its involvement in Indian manufacturing and taken the lead in advancing the nation's rural and regional manufacturing sectors' economic development. Due to their inflated and expanded product quality, exports, and employee employment, small and medium-sized enterprises currently hold critical importance in the Indian economy. Additionally, the overall contribution of India's small industries to the country's current economic situation is 40% of gross industrial value addition and close to 50% of all manufactured exports. Additionally, SME's in India are one of the leading industries for creating jobs after agriculture, employing roughly 2.94 million people in a period of three years (Mehta and Tajeddini 2016). Additionally, since India's independence, SME development and operation have been significant aspects of the Indian economy. Small businesses and organizations have been effective in satisfying the long-term demands of the national economy in terms of GDP contribution, employment, and exports, which has been equated to the socioeconomic growth of the nation.

The Micro, Small and Medium Enterprises Development Act (MSMED), 2006, is responsible for the establishment and legal framework of SME's in India. Singh et al. (2019) contend that the Act controls the creation, promotion, and friendly competition of SME's. Additionally, the Act's registration of a business offers a number of benefits designed specifically for SME's. The MSMED Act includes a number of essential provisions, such as simple access to money, favors in purchasing from and taking part in government bids, the reduction of power costs, and others. Any industry or business type may submit a registration application under the relevant Act. The persistent expansion of small and medium-sized businesses in India has improved development and success criteria for continued expansion in other industries. In addition, several Indian SME's are purchasing foreign enterprises as part of their development plan and expansion strategy as a result of the strengthened regulations and the periodic modifications to the Import Export Act and Fair-Trade Policy. The acquired businesses, however, serve primarily as export-related ancillaries. Additionally, the apparent success of SME's in the Indian economy has paved the way for increased opportunities for regional suppliers and manufacturers in the production of a specific product (Galvo et al. 2018). In order to have an effect on the world and survive the impending economic exigencies, Indian SME's have been investing significantly in R&D facilities recently. According to the most recent data, the Indian GDP is currently 7% contributed by the SME sector.

4.1. METHODOLOGY:

Salesforce is one of the best CRM platforms for managing customers. Each design schema uses a

separate set of metadata. It helps to demonstrate how business income grows in several dimensions. Its easy cloud access makes it possible to develop flexible and scalable things like data objects, mobile user interfaces, analytics, workflows, and identification. With over 800 applications and over 2700 partners, it had a sizable ecosystem.

Salesforce is expanding and adding a variety of features that might aid in UI completion and ease of creation. However, there were several readily manageable ways to provide user-friendly organization when lighting was introduced in 2015.Its provision of the future generation of UI and UX in salesforce aids in the creation of a contemporary experience that boosts productivity.

There are several analytics in salesforce, and organizations save a ton of data that can be used to create a variety of reports. For instance, if a business wants to create a report of all accounts and contacts together, it may create analytically connected reports and create the report dashboard in seven distinct graphical user interfaces. Salesforce Business process automation is utilized in a variety of situations such as workflows, process builders, and approval processes to produce tasks, outgoing messages, and email alerts. Some of the business processes are completed. CRM is a complex program that gathers client information from all touch points. identifying the correct kind of consumer and forecasting purchasing trends. CRM refers to business technology like sales, service, and marketing clouds. The new features that have recently been updated in Salesforce are listed below.

4.2. STREAMLINED PROJECT LIFECYCLE MANAGEMENT:

• **Project Planning:** Establish a centralized location for project schedules, milestones, and plans. Use project templates and Gantt charts to make project planning and initiation simpler. Make sure the project's goals are outlined explicitly and its dependencies are understood.

• **Task Execution and Progress Tracking:** Allow project teams to carry out tasks, monitor development, and instantly update project statuses. Offer tools for allocating tasks, establishing priorities, and organizing workloads. Utilize time tracking to keep an eye on resource allocation.

• **Monitoring and Control:** Put in place procedures for keeping tabs on the project's progress. Automatically create notifications for project plan deviations, such as missing deadlines or cost overruns. To keep projects on pace, let project managers make data-driven decisions.

MODEL FOR MANAGING EFFECTIVE SALES FORCE:

4.3. ENHANCED COLLABORATION:

• Communication Hub: Establish a central location for communications, debates, and notifications pertaining to the project. Incorporate real-time chat capabilities, discussion boards, and email connectors to enable efficient team collaboration.

• Document Sharing: Enable version control and secure document sharing. Embedding with cloud storage programmes will make it simple to obtain project documents including contracts, design specifications, and reports.

• Task Assignment: Simplify task delegation and assignment. Make sure that everyone on the team can quickly see their tasks, due dates, and priority. Allow for job escalation and reassignment as required.

• Client Collaboration: Set up client portals or guest access options so that clients can see how projects are progressing, offer feedback, and obtain pertinent materials. Improve openness while fostering strong client relationships.

4.4.DATA-DRIVEN DECISION-MAKING:

Compile a variety of project data, such as budgets, schedules, resource usage, and risk evaluations. To adapt data collecting to particular project needs, use custom fields and data objects.

• **Analytics and Reporting:** Create specialised dashboards and reports that offer project managers and stakeholders useful information. To visualise trends, performance metrics, and key performance indicators (KPIs), use Salesforce's reporting capabilities.

• **Predictive Analytics:** Use forecasting models and predictive analytics to foresee future project hazards and possibilities. Utilise project data from the past to enhance project planning in the future.

• **Business intelligence (BI) integration**: To undertake in-depth data analysis outside of Salesforce's built-in features, integrate with BI tools. As a result, data modelling and visualisation might be more intricate.

4.5. RESOURCE OPTIMIZATION:

• **Resource Planning:** Assign team members to projects based on their expertise, availability, and workload using resource allocation tools. Avoid underutilizing or overusing resources.

• **Resource Forecasting:** Determine the number of resources required for upcoming projects based on past data and anticipated demand. Make sure the appropriate resources are accessible as required.

• **Resource capacity**: Resource capacity is monitored in real-time through capacity management. To address changing project requirements or unanticipated resource limitations, adjust resource assignments as needed.

• **Resource Efficiency:** Track billable hours, project expenses, and resource utilisation rates to determine resource efficiency. Find places where resource allocation can be made more effective

4.6. RISK MITIGATION:

Implement risk assessment methods that make it easier to identify project risks and their possible effects on the project's success.

• **Risk Analysis:** Examine hazards in terms of likelihood and seriousness. Create plans for risk reduction, and designate accountable parties to handle identified risks.

• **Risk Monitoring:** Throughout the project lifecycle, continuously review and update risk assessments. Make sure that the appropriate mitigation measures are used.

• **Contingency Planning:** To reduce project disruptions, create contingency plans for high-impact risks. Automate the execution of backup plans when certain risk triggers are reached.

4.7. CLIENT ENGAGEMENT:

• **Client Portals:** Establish safe client portals where clients can access reports, deliverables, and project status updates. Allow customers to track project milestones and offer feedback.

• **Foster transparent**: Foster transparent communication with clients by giving them access to discussions and decisions made regarding projects. By keeping clients updated on the project, you can foster confidence.

• **Feedback Loops:** Use feedback methods, such surveys or feedback forms, to collect customer feedback and progressively enhance the customer experience.

• **Client Reporting:** Provide clients with personalised reports that are tailored to their individual requirements and preferences. Give clients the option to export and share project data in a variety of formats.

4.8. REPORTING AND ANALYTICS:

• **Custom Dashboards:** Design interactive dashboards that are specific to various user roles, from executives to project managers. These dashboards ought to show the most important project metrics, graphs, and conclusions.

• **Scheduled Reports:** Configure scheduled automated report delivery to stakeholders' email accounts. Make sure decision-makers always have access to crucial project information.

• **Ad Hoc Reporting:** Give users the tools they need to make custom reports and analyse project data. To help customers make the most of their reporting skills, offer support and training.

• **Data Export:** Promote data accessibility and flexibility by enabling the export of project data to other formats for additional analysis or integration with other technologies.

4.9. AUTOMATION AND WORKFLOW:

• **Workflow Automation:** Establish automated processes for common project tasks including document reviews, resource allocation requests, and project change approval protocols.

• **Task Assignment Rules:** Using preset criteria, roles, or skill sets as a basis, assignment rules can automate the assignment of tasks and responsibilities.

• **Alerts and Notifications:** Set up automated alerts and notifications to inform stakeholders of project updates, due dates, and milestones. Ensure that important information reaches the appropriate individuals at the appropriate time.

• **Automated approval processes**: Automated approval processes, such as those for budget approvals, modification requests, and scope amendments, would streamline project approvals.

4.10. SCALABILITY:

• **Modular Design:** Create your project management system with a modular structure to make it easy to add new features and functionalities as your organization's project management requirements change.

• **Scalable Infrastructure:** As project data, user numbers, and integrations grow, it's important to make sure the Salesforce infrastructure supporting them can handle the growth without sacrificing performance.

• **User Roles and Permissions:** Establish an access control system based on roles that can be easily expanded as the organisation expands to include more team members and functions.

• **Data Architecture:** Create a flexible data architecture that can support new data fields as needed and adjust to projects' shifting complexity.

4.11. INTEGRATION WITH SALESFORCE ECOSYSTEM:

To take advantage of current data and improve functionality, seamlessly integrate the project management system with other Salesforce modules and outside apps.
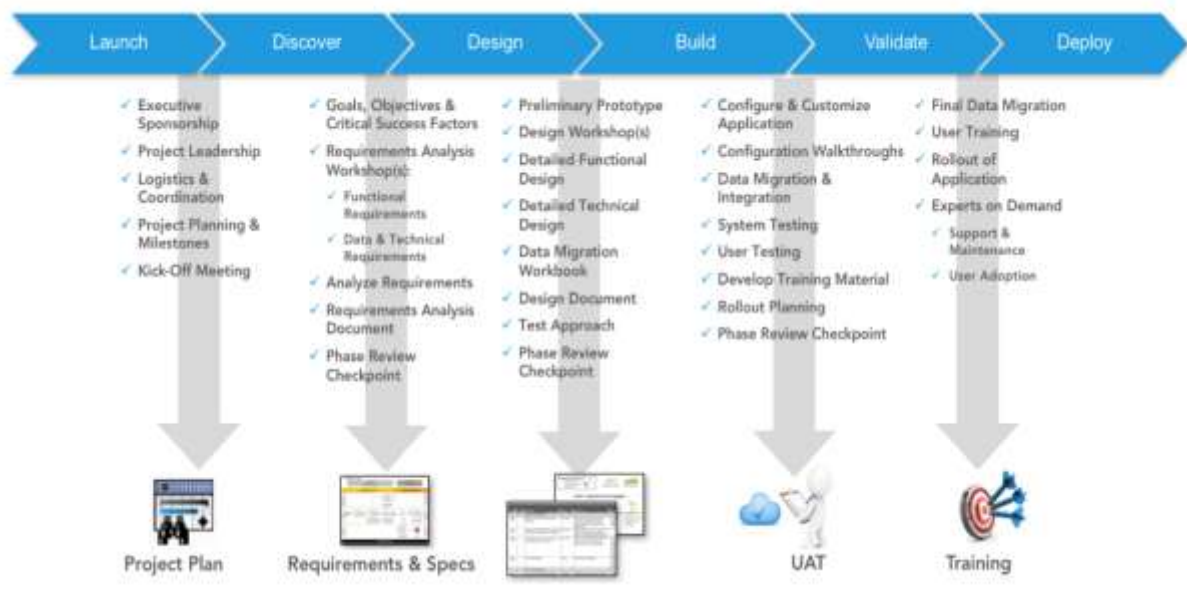

Figure 2. INTEGRATION WITH SALESFORCE FLOW

5.1. PROJECT MANGEMENT AND ITS SCOPE:

In order to complete specified objectives and achieve project success criteria within a given budget and timeline, important activities must be planned and managed. Application of knowledge, skills, tools, and procedures to project activities in order to achieve project requirements is known as project management. To steer a project from inception to finish within predefined scope, quality, time, and cost restrictions, project managers employ a methodical process. Skilled project managers may reduce surprises and keep teams focused on the main priorities and overall project vision by proactively recognising risks and restrictions and implementing plans to overcome them.

Figure.3. PROJECT MANAGEMENTS

The effort necessary to complete the major objectives and deliverables must be precisely defined. The scope establishes the focus and limits for what will be accomplished. Determining the order of steps necessary to finish the project by the deadline. This is accomplished by creating a timetable that takes job dependencies, resource availability, and durations into account.

Cost: Creating and maintaining a budget that does not go above available funding. Cost estimation and management are ongoing tasks that span the whole project lifecycle.

Quality: Ensuring that the final deliverables meet important functional and technical criteria and uphold appropriate standards of work. Verification and testing of final product, discoveries, and milestone outcomes are necessary for quality control.

Risk: Identifying potential risks that could have a negative influence on the project and creating methods to mitigate such risks. By lowering uncertainty, risk management enables effective emergency planning. Keeping stakeholders and team members informed on the project's goal, activities, timetables, responsibilities, and progress requires effective communication. Clear communication reduces confusion and promotes movement.

5.2. IMPORTANT PROJECT MANAGEMENT PHASES INCLUDE:

Establishing governance structures, securing funds and resources, and defining the project's scope and business necessity are all examples of initiating. To approve the job, a project charter is established.

Planning: Creating a strategy and timetable for finishing the work. A scope statement, work breakdown structure, timetable, budget, risk mitigation, quality plan, and communications plan are examples of important plans.

Performing the tasks: Performing the tasks outlined in the project management plans is known as execution. While keeping an eye on hazards and maintaining quality control, teams fulfil their assigned tasks and milestones.

Monitoring and controlling: Keeping tabs on developments to spot deviations from the plan and make necessary corrections to ensure project success. Progress reports offer updates and identify fresh dangers or problems that need fixing.

Closing: Bringing the project to a formal end by delivering the finished product, turning it over to the operations team, and conducting a project performance evaluation. Lessons are accumulated to help with upcoming initiatives.

Figure.4. IMPORTANCE OF PROJECT MANAGEMENT

5.3. WHY MANAGE PROJECTS USING SALESFORCE?

The most popular CRM in the world, Salesforce provides a single point of truth for your company that boosts productivity and user adoption. Salesforce offers an equally potent solution for organising and carrying out projects because to its strong built-in project management capabilities. Using Salesforce for project management is recommended for a number of reasons, including: Centralised data and seamless collaboration: All of your team members have access to the same platform that houses your project plans, tasks, documents, and conversations. No searching through various tools to find the most recent changes. Each person stays on the same page thanks to seamless collaboration.
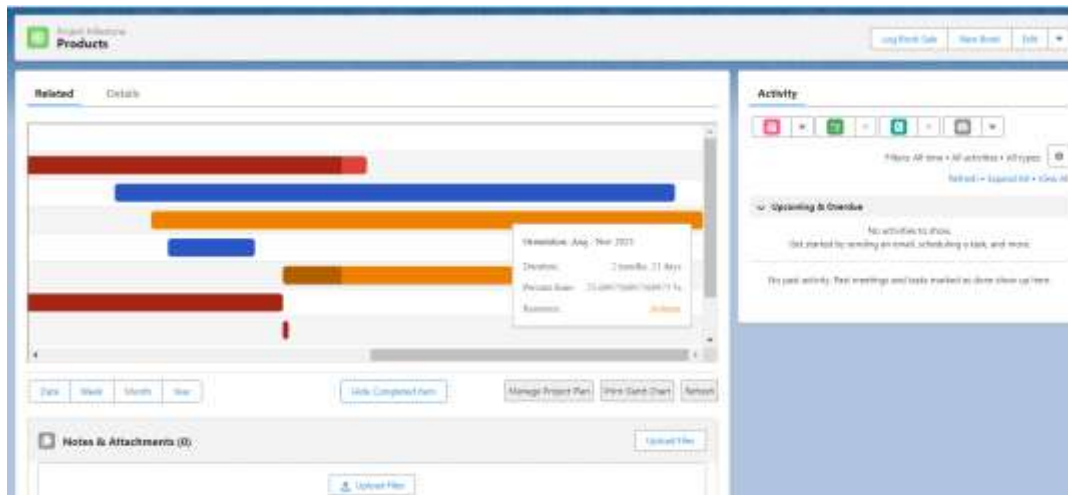

Figure 5. PRODUCT RELATED RECORDS

Control visibility and access to your projects depending on user employment roles and security profiles with role-based security. Executives may only view dashboards and reports, while project managers have full access. Manage personal projects using confidential information. Within Salesforce, your projects and intellectual property are secure. Analytics and reporting Utilise reports and dashboards to acquire insightful knowledge about your project portfolio. Monitoring key performance indicators for budgets, timelines, resources, risks, issues, and quality will help you improve planning and performance over time. Your project data is transformed into useful intelligence for success through reports and analytics.

Real-time visibility is important because you can identify problems or become behind schedule before status meetings and progress reports. You can receive real-time visibility into every facet of your project with just one project record in Salesforce, keeping track of budgets, resource allocation, milestone completion, and hazards before they materialise into major issues.

Integrated ecosystem: To expand your Salesforce environment, the AppExchange offers thousands of applications, parts, and consulting services. Discover resources for budgeting, document signing, resource management, and much more. Increase the return on your IT investments with pre-built connectors.

Figure.6. KEY ELEMENTS OF SUCCESSFUL PROJECT PLANNING

6.1. CONCLUSION:

The primary goal of this report was to conduct a survey on Salesforce's technology growth in marketing and data storage in the cloud. It is a scalable platform that is simple to set up and aids in the business expansion of several tools, including security models, apex triggers, analytics, etc.Currently, many new features include modifications to the way automation works with flows and some GUI in dashboards with the new UI in Salesforce Lightning. This paper provided detailed information on the applications, technologies, and customer relationship management techniques. Salesforce is a fantastic platform that is simple to use, strong, speedy, and has a friendly community. Salesforce presents a convincing idea for providing user-friendly CRM software as a service utilizing a flexible, dynamic cloud computing approach. Salesforce.com is a great example of an eCommerce company because it has excellent management, a clear business strategy, and a business model that uses cutting-edge technology in conjunction with a developer community and an accessible platform that is provided at a very low cost.

Figure.7. WORKFLOW OF SALESFORCE

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