

**Internship Report**  
**on**  
**An Analysis of the Customer Relationship Management of**  
**Copotronic Info Systems Limited**



**Date of Submission: 14 August, 2022**

**Internship Report**  
**on**  
**An Analysis of the Customer Relationship Management of**  
**Copotronic Info Systems Limited**

**Submitted to:**  
**Professor Mohammed Masum Iqbal, PhD**  
**Department of Business Administration**  
**Faculty of Business and Entrepreneurship**  
**Daffodil International University**

**Prepared by:**  
**Atick Chowdhury**  
**ID: 171-11-1087**  
**Batch: 46**  
**Program: BBA**  
**Major in Marketing**  
**Department of Business Administration**  
**Daffodil International University**



**Date of Submission: 14 August, 2022**

## Letter of Transmittal

14 August, 2022

Professor Dr. Masum Iqbal, PhD  
Department of Business Administration  
Faculty of Business and Entrepreneurship  
Daffodil International University

Subject: Submission of Internship Report **“An Analysis of the Customer Relationship Management of Copotronic Info Systems Limited”**

Dear Sir,

I have prepared my internship report on the topic of **“An Analysis of the Customer Relationship Management of Copotronic Info Systems Limited”** under your kind supervision as a requirement of completing the degree of BBA program. I have tried my best to prepare the report in consistence with the optimal standard under your valuable direction.

I made every effort to reveal greater insight in this report. I hope that this will meet the standard of your judgment.

Thanking you for your kind supervision.

Sincerely yours



.....  
(**Atick Chowdhury**)

ID: 171-11-1087

Batch: 46

Program: BBA

Major in Marketing

Department of Business Administration

Faculty of Business & Entrepreneurship

Daffodil International University

## **Certificate of Supervisor**

This is to certify that the internship report entitled “**An Analysis of the Customer Relationship Management of Copotronic Info Systems Limited**” is prepared by Atick Chowdhry, ID: 171-11-1087, Major in Marketing, as a requirement of the BBA program under the Department of Business Administration and the Faculty of Business and Entrepreneurship at Daffodil International University.

The report is recommended for submission.



.....  
**(Professor Dr. Masum Iqbal, PhD)**

Department of Business Administration  
Faculty of Business and Entrepreneurship  
Daffodil International University

## **Student's Declaration**

I do hereby solemnly declare that the work presented in this Internship Report has been carried out by me and has not been previously submitted to any other University/ College/ Organization for an academic certificate/degree.

I, Atick Chowdhury, ID: 171-11-1087, declare that the presented internship report on “**An Analysis of the Customer Relationship Management of Copotronic Info Systems Limited**” submitted as a course requirement for the award of the degree of Bachelor of Business Administration at Daffodil International University was prepared by me.

The work I have presented does not breach any existing copyright and no portion of this report is copied from any work done earlier for a degree or otherwise.

I further undertake to indemnify the damage arising from breach of the foregoing obligations.



.....  
**(Atick Chowdhury)**

ID: 171-11-1087

Batch: 46

Program: BBA

Major in Marketing

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Faculty of Business & Entrepreneurship

Daffodil International University

## **Acknowledgement**

At the very beginning, I would like to express my deepest gratitude to the Almighty Allah for giving me the strength and the ability to finish the task within the scheduled time.

The internship research paper submitted here is performed as a part of my internship program. Preparation of this report received assistance, guidance and took valuable time of my supervisor Professor Mohammed Masum Iqbal, Department of Business Administration, Faculty of Business and Entrepreneurship.

Firstly, I would like to convey my gratefulness to Almighty Allah for providing me the strength and opportunity to complete the report within the schedule time successfully.

However, I am immensely indebted to several staffs of Advanced Information Management Solutions Limited without whose support the report would have been really difficult to conduct. I would take this opportunity here to thank them for sharing their valuable time for long discussion and wise suggestion, thoughts during the internship program.

Finally, I would like to give thanks to my fellow friends for their help at the stage of preparing this report.

## **Executive Summery**

Customer Relationship Management (CRM) is the strongest and the most efficient approach in maintaining and creating relationships with customers. Customer relationship management is not only pure business but also ideate strong personal bonding within people. Development of this type of bonding drives the business to new levels of success.

This report based on the internship program, partial requirement for the Bachelor of Business Administration in Daffodil International University. The main objectives of report are to find out Customer Relationship Management of Copotronic Info Systems Limited. The report discusses about the Customer Relationship Management of Copotronic Info Systems Limited. The report is divided into five chapters. First Chapter contains the introductory part of the report which implies introduction, origin, significance, objectives, scope, methodology and limitations.

Second chapter includes the Background of Copotronic Info Systems Limited, products of Copotronic Info Systems Limited, partnership with government, HR development for outsourcing, education automation of government, e-HRM & ERP, e-Attendance device manufacturing, e-learning systems and web development & Hosting of Copotronic Info Systems Limited.

Third chapter consists theoretical aspects of Customer Relationship Management.

Four chapters consists Customer Relationship Management in Copotronic Info Systems Limited.

Five chapters consists problems and recommendations and conclusion about the report. Finally, with Big Data and Predictive Analytics, the entire customer management process is being revolutionized and this is where the future of CRM lies. In conclusion, customer delight and customer wow are no longer simply superlatives in the dictionary but meaningful and easy to actualize with the use of CRM.

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**Chapter-01**  
**Introduction**

## **1.1 Introduction of the Study**

The information technology sector in Bangladesh had its beginnings in nuclear research during the 1960s. Over the next few decades, computer use increased at large Bangladeshi organizations, mostly with IBM mainframe computers. However, the sector only started to get substantial attention during the 1990s. Today the sector is still in a nascent stage, though it is showing potential for advancement. Nonetheless, Bangladesh IT/ITES industry has fared comparatively well by achieving US\$ 1.3 billion export earnings in FY 2020-21 and holding US\$ 1.4 billion equivalent market share in the local market contributing 0.76 per cent to the GDP creating more than 1 million employment opportunities so far amid Covid-19 havoc that suddenly shattered businesses last year. Consequentially, riding on the successes of IT/ITES sector-supported export-led industries as well as pro-private sector and conducive policies pursued by Bangladesh Government, the country is now poised to become a Developing Country by 2026, as recommended by the United Nations Committee for Development Policy (UNCDP), besides, Bangladesh now seeks to transform itself into a knowledge-based and 4IR-driven cashless economy, aiming to become a developed country by 2041. The Bangladesh government has formulated a draft 'Made in Bangladesh– ICT Industry Strategy' aimed at turning Bangladesh into a ICT manufacturing hub, enhancing export of local products, attracting foreign investment and creating employment proposing to implement in three terms— short term from 2021 to 2023, mid-term from 2021 to 2028 and long term from 2021 to 2031 for implementation of the 65 action plans.

Customer Relationship Management (CRM) software keeps getting attention because it enables businesses to stay updated with the needs of customers, which are constantly evolving. Rapid progress in the IT sector has especially enhanced the need for IT and Its companies to adopt CRM software.

In broad terms, CRM enables businesses to build relations with customers and increase acquisition, retention, loyalty, and profitability. But modern CRM tools do much more. They also allow IT companies to improve operational efficiency and substantially reduce the time spent in generating reports for internal purposes and for clients.

CRM system stores and analyzes massive amounts of customer data and provides insights into customer behavior and how a company can influence.

## **1.2 Origin of the Study**

The title of the study is Customer Relationship Management of Copotronic Info Systems Limited originated from the fulfilment of the BBA program under Daffodil international university. For the internship program, each student is attached with an organization. I have worked under the department of IT of Copotronic Info Systems Limited from 15<sup>th</sup> January, to 15<sup>th</sup> May, 2022 and prepared this study under the supervision of Professor Mohammed Masum Iqbal PhD, Department of Business Administration, Faculty of Business & Entrepreneurship, Daffodil International University.

## **1.3 Significance of the Study**

Knowledge and learning become perfect when it is associated with theory and practice. This Internship Report is an important partial requirement of four year BBA graduation program. As the parties; educational institution and the organization substantially benefit from such a program, it seems a “win-win situation”. That’s why practical orientation is a positive development in professional area. Recognizing the importance of practical experience, Department Business Administration of DIU has introduced a three months’ practical exposure as a part of the curriculum of Bachelor of Business Administration (BBA) program. In such state of affairs, the present aiming at analyzing the experience of practical orientation related to an appraisal of Copotronic Info Systems Limited.

## **1.4 Objectives of the Study**

The objectives of the study are following:

- i. To explain customer relationship management;
- ii. To illustrate the customer relationship management of Copotronic Info Systems Limited;
- iii. To identify the problems related to customer relationship management of Copotronic Info Systems Limited;
- iv. To make some recommendations to improve customer relationship management of Copotronic Info Systems Limited;

## 1.5 Scope of the Study

This study will cover Customer Relationship Management of Copotronic Info Systems Limited. It will give a wide view of the different stages of marketing operational procedure of Copotronic Info Systems Limited.

## 1.6 Methodology of the Study

**Nature of the study:** The study is descriptive in nature. The study mainly describes the process that is followed by the Copotronic Info Systems Limited.

**Data sources:** There are two types of data used to prepare this study. They are primary sources of data and secondary sources of data. No structured questionnaire is used to prepare this study.

### a. Primary Sources of Data:

- ❖ Officers.
- ❖ Clients.
- ❖ Supervisors.

### b. Secondary Sources of Data:

- ❖ Annual Study of Copotronic Info Systems Limited;
- ❖ Different publications regarding Marketing of Copotronic Info Systems Limited;
- ❖ From Newspapers and Internet.

## 1.7 Limitations of the Study

Faced some limitations. The main problem I faced in preparing the paper was the inadequacy and lack of availability of required data. This study is an overall view of **Customer Relationship Management of Copotronic Info Systems Limited**. But there is some limitation for preparing this study. These barriers, which hinder my work, are as follows:

- Difficulty in accessing latest data of internal operations.
- Lack of confidential information regarding marketing operations.
- Lack of experience on preparing these types of study.
- Time constraints to prepare this study.

**Chapter-02**  
**Company Profile**

## **2.1 Background of Copotronic Info Systems Limited**

Copotronic InfoSystems has established in 1996 as a partnership IT company in Chittagong, the port city of Bangladesh with the effort of a university student. Initially the company worked for providing computer training & selling of computer, hardware and network solutions. From 1996 to 2000 Copotronic gained more than 30,000 computers selling experience along with a huge number of customers in private, Govt., organizations.

## **2.2 Products of Copotronic Info Systems Limited**

- i. Institute Management Systems
- ii. e-learning
- iii. e-hajira
- iv. Online Olympiad Game
- v. Computer Education
- vi. Hardware Installation and Services
- vii. Digital Marketing
- viii. Graphics Design
- ix. Video Animation
- x. App Development
- xi. Software Development and Solution
- xii. Web Design
- xiii. Web Development
- xiv. Network Solutions and IT Consultancy

## **2.3 Partnership with Government**

Copotronic became a private limited company in June, 2001 and expanded its activities in more in software development track & IT enabled services. Copotronic has a working experience in ICT market for of more than 16 years. Now a day the core business of the company is software development, ITES, ICT based solution providing & ICT training for large industries & educational institutes and from its offices both in Dhaka & Chittagong.

For the outstanding performance Copotronic become a Private-Govt. joint partnership software company having Government investment & participation in management.



Copotronic is a 51:49 partnership software company with Govt. with a paid up capital 42 million.

## **2.4 HR Development for Outsourcing**

Copotronic is the authorized center for “**Skill Enhancement Program**” of Bangladesh Hi-Tech Park Authority to provide IT and outsourcing training to graduates under ICT ministry to build ICT enabled human resources for business process outsourcing.

Copotronic also authorized company for “**Employee Incentive Program**” of Hi-Tech Park under ICT ministry to train and provide employment to the graduate students. Upto now Copotronic trained and provided employment of 65 persons under the project.

Copotronic’s Managing Director has successfully completed “Advance Management Course” from University of Hong Kong under the “**C Level Training Program**” of Bangladesh HI-Tech Park authority and now also working as a resource person of Hi-Tech Park authority to conduct C-Level training to the C-level executives working in IT/ITES industries. Upton now trained more than 70 C-Level executives of the country.

Copotronic has already successfully completed training of 200 students in IT/ITES course under “**Learning and Earning Development Project**” of Ministry of ICT.

Copotronic is a ISO 9001-2008 certified company for Quality Management system under the “**Company Certifications Program**” of Support to development of Kaliakoir Hi-Tech Park development project.

Copotronic is now ready to provide any sorts of outsourcing service of international market.

## **2.5 Education Automation of Govt.**

Copotronic is authorized technical partner of Dhaka, Chittagong and Comilla education boards under “e-Service” project of Ministry of Education. Copotronic has developed “Education Board Management software” solution and providing all sorts online services, web portal, dedicated server hosting for education boards. Copotronic is serving around 4000 education institutes for managing public examination system online and served 60 million students & teachers by several online services.

## **2.6 e-HRM and ERP**

Copotronic has also developed and providing ERP software solutions for Small/Medium and Large industries. Copotronic provides Human resource management, POS, production management, financial management, supply chain management, commercial management etc. More than 100 of most reputed industries in Bangladesh are using Copotronic's software solutions.

## **2.7 e-Attendance Device Manufacturing**

For the first time in Bangladesh Copotronic has developed Online Attendance Device with online attendance software for all sorts of organization. It is RFID and Biometric device along with Wifi connectivity which can use all over the world for taking online attendance.

## **2.8 e-Learning Systems**

Copotronic has developed "Digital Education Management System" for education institutes worldwide. By using the system any institute can be turned digital and all necessary information i.e. students, teachers, staff, attendance, results, payment, fees, accounts, library, inventory etc. will be completely automated. Around hundreds of educational institutes including Govt. colleges, schools, medical college, university, private schools, colleges are using Copotronic's eLearning Systems.

## **2.9 Web Development and Hosting**

Copotronic is a leading web development & hosting service providing company. Thousands of Govt., private organizations are using several Web applications, e-Commerce, ePayment gateway and Hosting service.

# **Chapter-3**

## **Theoretical Framework**

### **3.1 Customer**

A customer is an individual or a business that purchases goods or services produced by a business. Attracting the customers is the primary goal of most public-facing businesses because it is the customer who creates demand for the produced goods and services. Business organizations often go through several processes to attract an ever-larger customer base.

### **3.2 Customer Service**

Service given to the customers from the time of their first contact and even after the purchase is known as customer service. It includes providing appropriate required information to the clients and helping them with all their queries. Nowadays, it has become one of the most important aspects of business and every business outlet has a customer service desk. Customer service falls in two categories and these are manual and automated.

### **3.3 Customer Relationship**

Simply, relationship is the way by which two or more people or things become connected or it is the state of being connected. Thus, customer relationship is a process or manner by which a business develops, establishes, and maintains relationship with its customers. Businesses rise and fall through the support of their customer bases. Consequently, it is an essential tool that helps to acquire effective customers. On a practical level, customer relationship means effectively communicating with the customers and promptly addressing complaints and treating them as opportunities for improvement.

### **3.4 Management**

Management is the administration of an organization, whether it is a business, a non-profit organization, or a government body. Management includes the activities of setting the strategy of an organization and coordinating the efforts of its employees or volunteers to accomplish its objectives through the application of available resources, such as financial, natural, technological and human resources. The term "management" may also refer to the people who manage an organization.

### **3.5 Customer Relationship Management (CRM)**

Customer Relationship Management (CRM) is the strongest and the most efficient approach in maintaining and creating relationships with customers. Customer relationship management is not only pure business but also ideate strong personal bonding within people. Development of this type of bonding drives the business to new levels of success.

The idea of customer relationship management is that it helps businesses use technology and human resources to gain insight into the behaviour of customers and the value of those customers. If it works as hoped, a business can provide better customer service, make call canters more efficient, cross sell products more effectively, help sales staff close deals faster, simplify marketing and sales processes, discover new customers, and increase customer revenues. It doesn't happen by simply buying software and installing it.

For customer relationship management to be truly effective, an organization must decide what kind of customer information it is looking for and it must decide what it intends to do with that information. For example, many financial institutions keep track of customers' life stages in order to market appropriate banking products like mortgages or IRAs at the right time to fit customer needs. Next, the organization must look into all of the different ways by which information about customers comes into a business, where and how this data is stored and how it is currently used.

### **3.6 Importance of Customer Relationship Management**

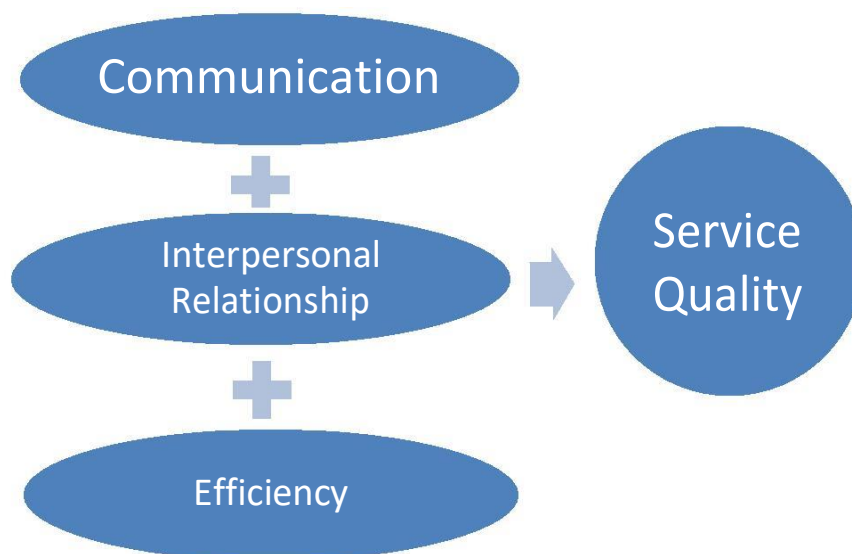
Advanced Information Management Solutions Limited of a business organization, customer relationship management is essential for the following reasons-

- A customer relationship management system consists of a historical view and analysis of all the acquired or to be acquired customers. This helps in reduced searching and correlating customers and to foresee customer needs effectively and increase business.
- Customer relationship management contains each and every bit of details of a customer, hence it is very easy for tracking a customer accordingly and can be used to determine which customer can be profitable and which not.
- In customer relationship management system, customers are grouped according to different aspects, according to the type of business they do or according to physical location and are allocated to different customer managers often called as account

managers. This helps in focusing and concentrating on each and every customer separately.

- The strongest aspect of customer relationship management is that it is very cost-effective. The advantage of decently implemented customer relationship management system is that there is very less need of paper and manual work which requires lesser staff to manage and lesser resources to deal with. The technologies used in implementing a CRM system are also very cheap and smooth as compared to the traditional way of business.
- All the details in customer relationship management system is kept centralized which is available anytime on fingertips. This reduces the process time and increases productivity.
- Efficiently dealing with all the customers and providing them what they actually need increases the customer satisfaction. This increases the chance of getting more business which ultimately enhances turnover and profit.
- If the customers are satisfied, they will always be loyal to us and will remain in business forever resulting in increasing customer base and ultimately enhancing net growth of business.
- Installing a customer relationship management system can definitely improve the situation and help in challenging the new ways of marketing and business in an efficient manner. Hence, in the era of business every organization should be recommended to have a full-fledged customer relationship management system to cope up with all the business needs.

### 3.7 Factors of Customer Relationship Management:



➤ **Communication:**

Communication refers to the association between a bank and its clients. It can add value to the service in the eyes of the customer. Communication is a continual series of dialogue or conversations with clients, with the goal being to get them. Communication with clients should be viewed as a two-way mechanism rather than as a one-way. The value of two-way communication is evident because of its potential for spontaneity and creativity. Banks always create value for clients through communication methods that ensure two-way communication.

➤ **Interpersonal Relationship:**

Interpersonal relationship increases commitment from both customers & suppliers sides which finally increases trust between each other rendering business growth. Customers maintaining a long-lasting relationship will be less predisposed to switch as they are with the firm for a long time. Using the service more in depth and investing in complementary services strong bond between two or more people refers to interpersonal relationship.

➤ **Efficiency:**

Efficiency refers to the degree to which a task or activity is performed correctly on time. The efficiency of banking services may be defined as the degree to which a task or activity for the clients of a bank are performed correctly or as desired. The influence of the degree of perceived efficiency of banking services on customer relationship management will be investigated in this study. For the purpose of this study, various dimensions within the service delivery of banking institutions are included in the variable efficiency of banking services, namely confidentiality of personal information, security of personal funds, ethical behaviour of the institution, variety of services offered, bank charges, and technical development within the institution.

➤ **Service Quality:**

A service is a process consisting of a series of more or less intangible activities that normally, but not necessarily always, take place in interactions between the customer and service employees or physical resources or goods or systems of the service provider, which are provided as solutions to customer problems. It is a global judgment or attitude relating to impression of the relative inferiority or superiority of the organization and its services. Service quality is a cognitive judgment.

### **3.8 Why CRM?**

In the commercial world the importance of retaining existing customers and expanding business is paramount. The costs associated with finding new customers mean that every existing customer could be important. The more opportunities that a customer has to conduct business with our company the better, and one way of achieving this is by opening up channels such as direct sales, online sales, franchises, use of agents, etc. However, the more channels we have, the greater the need to manage our interaction with our customer base.

Customer relationship management (CRM) helps businesses to gain an insight into the behaviour of their customers and modify their business operations to ensure that customers are served in the best possible way. In essence, CRM helps a business to recognize the value of its customers and to capitalize on improved customer relations. The better we understand our customers, the more responsive we can be to their needs.



# **Chapter-04**

## **Analysis**

## **4.1 Customer Relationship Management in Copotronic Info Systems Limited**

### **Optimized networking with centrally stored data:**

- All of their departments and employees are joined together in a single system.
- Integrate all of their existing office, enterprise resource planning and archiving solutions into one central system.
- Save time by increasing cooperation and direct access to centrally pooled information.
- Increase our efficiency using structured and automated workflows.
- Customize our CRM software to suit changing needs in areas such as workstations, locations and even for remote locations abroad.

### **Using their customer knowledge profitably:**

- The chronological customer dossier forms the cornerstone of professional customer care.
- The 360° customer view contains: all orders, phone calls, contracts and correspondence, all available at the touch of a button.
- Recognize hidden potential by analyzing customer profiles.
- Detailed knowledge of their customers helps us to sensibly plan the further development of our products and services.

### **Smart sales management:**

- Manage their marketing and sales operations according to target groups.
- All the necessary information on our prospects is always at our fingertips. When we make a recommendation it is always at the right time and can carry the most impact.
- Special targeting measures such as cross and up-selling help to multiply orders.
- We can identify sales opportunities early and then make the most of them.

### **Motivated employees and first-rate service:**

- Their employees benefit from the support that a CRM system brings, this relieves them of routine tasks and saves time for other work.
- As they have all the relevant information at their fingertips our employees can make more informed decisions and increase their efficiency when dealing with customers.

- Customers notice if our employees are motivated, confident and competent which all helps to increase customer satisfaction.

#### **Pro-active management:**

- Always having our finger on the pulse of all active projects supports effective decision making and pro-active management, keeping us firmly in the saddle.
- CRM software helps us with the forward planning of resources and budgeting as well as providing support for running projects by recording times and costs.
- Current analyses and efficient accounting always keep us on course.

It is worth investing in professional project management. The organization of our business processes and workflows will improve, and we can save precious time and money.

## **4.2 Copotronic Info Systems Limited IT Services Features**

#### **Smart address management:**

Automated processes for address maintenance make work easier for everyone in our company. We can move addresses with drag and drop, check with just one click if addresses are correct and duplicates have been created. Synchronize our addresses with current reference databases and enhance them with data relevant for decision making processes. The address mask can be customized depending on the content and ergonomic requirements.

#### **Customer dossier:**

The customer dossier is at the heart of every professional consultation. Within seconds, we will be able to see all appointments, tasks, call notes, service contracts, product uses, correspondence, opportunities, support requests, bills and projects – all information about our customer is displayed in a well-structured manner and is sorted chronologically.

#### **Efficient sales processes:**

Keep track of our business opportunities to make the most of potential sales. With opportunities, we can manage leads: from the initial contact to the closure of the sale. The automatic notification and action service keeps us informed about events like birthdays, changed appointments or escalations. Not only that but we can also create for Copotronic Info Systems Limited and reports on sales potential at the touch of a button.

**Interdepartmental collaboration:**

Copotronic Info Systems Limited IT Services ensures that all employees have access to the same central database. This makes it easy to schedule appointments, manage tasks and documents, and work together in projects. Support Copotronic Info Systems Limited are easily solved as employees are well informed and are able to answer questions in a competent manner.

**Precisely targeted marketing campaigns:**

Multi-phase campaigns are easily planned and implemented. Filter by customers that have service agreements and make the most of cross selling potential. With this solution all our customers' responses are automatically stored and we can forward leads directly to the sales department and generate turnover figures. The smart analysis feature enables us to find out instantly how effective a campaign was.

**Planning and managing projects:**

Benefit from an effective system for planning and controlling our projects. All this means we can plan and structure our projects precisely. Include risks, phases, milestones and targets, tasks, resources, budgets, costs and times right from the start. The project status, ad-hoc analyses and an early warning system allow us to keep our projects well on track at all times.

**Planning and managing projects:**

Benefit from an effective system for planning and controlling our projects. All this means we can plan and structure our projects precisely. Include risks, phases, milestones and targets, tasks, resources, budgets, costs and times right from the start. The project status, ad-hoc analyses and an early warning system allow us to keep our projects well on track at all times.

**Project controlling:**

Assigning working hours to projects is the foundation of effective project management accounting. Copotronic Info Systems Limited IT Services has a smart time recording feature – both for customers and for projects – which records, for example, hourly rates, estimate-to-complete figures, the time remaining, the budget, and material and external costs.

### **Project dashboards for a better view:**

Project dashboards allow us to always see the latest information about our projects at a glance. Analyses can be easily created, be it for one single or more projects. Daily updated status reports are the basis for project bills that are created with just one click using an ERP add-in.

### **Helpdesk for maximum efficiency:**

Service requests are organized transparently: A trouble ticket system records error reports, controls who is processing the task, informs the sales department and allows customers to keep track of their error reports on the Internet. Automatic recording of the processing time and the resources used allow us to remain in full control of our costs. Create analyses for departments or individual customers with just one click. In this way, we are always informed about our customer's service entitlements.

### **Knowledge database and online support:**

Make use of knowledge gained over the years. All successfully processed service requests are collected in one central knowledge database and can be quickly retrieved. The FAQ database saves frequently asked questions and makes them available for customers via a Web client, enhanced with additional information, such as diagrams or illustrated instructions. Our hotline staff's day-to-day work is made considerably easier.

### **Access data at any time and from anywhere:**

No matter whether our company has offices in different locations, our employees work from home, or members of our sales team need to access data from their smartphones or laptops while on the road – all our staff will always have instant access to up-to-date data: via replication or the Internet. Our employees are always well informed.

## **4.3 CRM can be achieved by Info Copotronic Systems Limited**

- Finding out about our customers' purchasing habits, opinions and preferences
- Profiling individuals and groups to market more effectively and increase sales
- Changing the way, we operate to improve customer service and marketing

- Benefiting from CRM is not just a question of buying the right software. We must also adapt our business to the needs of our customers.

#### **4.4 Ultimately this could lead to Copotronic Info Systems Limited**

- Enhanced customer satisfaction and retention, ensuring that our good reputation in the marketplace continues to grow
- Increased value from our existing customers and reduced cost associated with supporting and servicing them, increasing our overall efficiency and reducing total cost of sales

Once our business starts to look after its existing customers effectively, efforts can be concentrated on finding new customers and expanding our market. The more we know about our customers, the easier it is to identify new prospects and increase our customer base.

Even with years of accumulated knowledge, there's always room for improvement. Customer needs change over time, and technology can make it easier to find out more about customers and ensure that everyone in an organization can exploit this information.

#### **4.5 Types of CRM solution Copotronic Info Systems Limited**

Customer relationship management (CRM) is important in running a successful business. The better the relationship, the easier it is to conduct business and generate revenue. Therefore, using technology to improve CRM makes good business sense. CRM solutions fall into the following four broad categories.

##### **4.5.1 Outsourced solutions:**

Application service providers can provide web-based CRM solutions for our business. This approach is ideal if we need to implement a solution quickly and our company does not have the in-house skills necessary to tackle the job from scratch. It is also a good solution if we are already geared towards online e-commerce.

##### **4.5.2 Off-the-shelf solutions:**

Several software companies offer CRM applications that integrate with existing packages. Cut-down versions of such software may be suitable for smaller businesses. This approach is generally the cheapest option as we are investing in standard software components. The

downside is that the software may not always do precisely what we want and we may have to trade off functionality for convenience and price. The key to success is to be flexible without compromising too much.

#### **4.6 Custom software of Copotronic Info Systems Limited**

For the ultimate in tailored CRM solutions, consultants and software engineers will customise or create a CRM system and integrate it with our existing software.

However, this can be expensive and time consuming. If we choose this option, make sure we carefully specify exactly what we want. This will usually be the most expensive option and costs will vary depending on what our software designer quotes.

#### **4.7 Managed solutions of Copotronic Info Systems Limited**

A half-way house between custom and outsourced solutions, this involves renting a customised suite of CRM applications as a tailored package. This can be cost effective but it may mean that we have to compromise in terms of functionality.

#### **4.8 To implement CRM in Copotronic Info Systems Limited**

The implementation of a customer relationship management (CRM) solution is best treated as a six-stage process, moving from collecting information about our customers and processing it to using that information to improve our marketing and the customer experience.

#### **4.9 Potential drawbacks of CRM in Copotronic Info Systems Limited**

There are several reasons why implementing a customer relationship management (CRM) solution might not have the desired results.

There could be a lack of commitment from people within the company to the implementation of a CRM solution. Adapting to a customer-focused approach may require a cultural change. There is a danger that relationships with customers will break down somewhere along the line, unless everyone in the business is committed to viewing their operations from the customers' perspective. The result is customer dissatisfaction and eventual loss of revenue.

Poor communication can prevent buy-in. In order to make CRM work, all the relevant people in our business must know what information we need and how to use it.

Weak leadership could cause problems for any CRM implementation plan. The onus is on management to lead by example and push for a customer focus on every project. If a proposed plan isn't right for our customers, don't do it. Send our teams back to the drawing board to come up with a solution that will work.

Trying to implement CRM as a complete solution in one go is a tempting but risky strategy. It is better to break our CRM project down into manageable pieces by setting up pilot programs and short-term milestones. Consider starting with a pilot project that incorporates all the necessary departments and groups but is small and flexible enough to allow adjustments along the way.

Don't underestimate how much data we will require, and make sure that we can expand our systems if necessary. We need to carefully consider what data is collected and stored to ensure that only useful data is kept.

Avoid adopting rigid rules which cannot be changed. Rules should be flexible to allow the needs of individual customers to be met.

#### **4.10 Flexible modular CRM of Copotronic Info Systems Limited**

##### **CRM opens doors:**

Are we looking for a CRM solution that is tailor-made to our company processes and requirements? Advanced Information Management Solutions Limited is the key to as many doors as we need. Our powerful, multiple-award winning standard CRM solution supports our business processes right from the start.

- Advanced Information Management Solutions Limited grows with our company.
- The flexible CRM software offers special modules for all types of business functions from marketing to customer support.
- Copotronic Info Systems Limited is an open CRM solution that makes integrating our existing company applications easy; this ensures company-wide consistent data.

Copotronic Info Systems Limited is the control centre of our customer relationship management operations. Read on to find out more about Copotronic Info Systems Limited.



#### **4.11 CRM for service providers of Copotronic Info systems Limited**

Service providers are more reliant on satisfied customers and their recommendations than perhaps any other sector. Because customers are more likely to remain loyal to a provider who best meets their needs.

Copotronic Info Systems Limited CRM software requirements:

- Impress our customers with targeted consulting to give them the right advice.
- Quick reaction times with customer calls.
- Effective management of turnover, costs and limited resources.

#### **The benefits of CRM Different caption:**

Centrally stored data makes company processes more effective. Addresses, tasks, projects and appointments are all at our finger tips. We can update the data at any time and all users can see it.

Every customer is of value to a company. A professional CRM system helps we segment our customers into different groups and then target these groups effectively. This helps us to make realistic quotes that convince our customer.

We can tailor individual solutions that exactly match our requirements through third-party interfaces in Copotronic Info Systems Limited Genesis World. Likewise, integrations with ERP systems, mobile devices or with project management software are easy to realize. All kinds of applications can be easily integrated under one interface.

#### **4.12 CRM in Copotronic Info Systems Limited**

Competent consultation, excellent support and project managers that meet their deadlines and maintain their budget – these key factors are essential for gaining a competitive edge in the IT industry.

#### **Their CRM software requirements:**

- Manage projects efficiently.
- Departments and project teams work in one network.
- Impress our customers with competent service.

**The benefits:**

CRM software provides support in all project phases. The highest levels of transparency are realized by planning and controlling projects in a well-organized manner. A CRM solution manages and records all of our resources and time.

Our service employees always have access to all our customer data. Which product does the customer use? Which service agreement has been signed? We can find all the answers to these questions in the CRM software. So that employees are always informed about the extent of services available.

Copotronic Info Systems Limited IT Services company solution has been developed to meet the requirements of IT companies: from IT service providers who focus on consulting and service to software providers who sell products with marketing campaigns.

**Efficient sales processes:**

Keep track of our business opportunities to make the most of potential sales. With opportunities, we can manage leads: from the initial contact to the closure of the sale. The automatic notification and action service keeps we informed about events like birthdays, changed appointments or escalations. Not only that but we can also create fore Copotronic Info Systems Limited and reports on sales potential at the touch of a button.

**Precisely targeted marketing campaigns:**

Multi-phase campaigns are easily planned and implemented. We can, for example, filter by customers that have service agreements and make the most of cross selling potential. With this solution all our customers' responses are automatically stored and we can forward leads directly to the sales department and generate turnover figures. The smart analysis feature enables us to find out instantly how effective a campaign was.

**Planning and managing projects:**

Benefit from an effective system for planning and controlling our projects. All this means we can plan and structure our projects precisely. Include risks, phases, milestones and targets, tasks, resources, budgets, costs and times right from the start. The project status, ad-hoc analyses and an early warning system allow us to keep our projects well on track at all times.

### **Project controlling:**

Assigning working hours to projects is the foundation of effective project management accounting. Copotronic Info Systems Limited IT Services has a smart time recording feature - both for customers and for projects - which records, for example, hourly rates, estimate-to-complete figures, the time remaining, the budget, and material and external costs.

### **Helpdesk for maximum efficiency:**

Service requests are organized transparently: A trouble ticket system records error reports, controls who is processing the task, informs the sales department and allows customers to keep track of their error reports on the Internet. Automatic recording of the processing time and the resources used allow us to remain in full control of our costs. Create analyses for departments or individual customers with just one click. In this way, we are always informed about our customer's service entitlements.

## **4.13 CRM for the automotive in Copotronic Info Systems Limited**

There are few industrial sectors as dynamic as the automotive industry. Car dealerships have to demonstrate outstanding customer service and competency if they want to stay ahead of their competition.

Copotronic Info Systems Limited CRM software requirements:

- Effective sales support.
- Manage service and customer appointments.
- Increase our customer satisfaction so that we can retain existing customers and win new customers by word-of-mouth.

### **The benefits:**

CRM software helps car dealers achieve excellence by offering first-rate service and competent advice. All of our customer data is stored and managed centrally so that all of our employees have immediate access to customer data at a click of the mouse.

Sales can enjoy the support that CRM gives them and this means they have more time for selling. Our sales team have all the information they need, which they can even access when mobile, data such as customer addresses and information on optional extras is available at the touch of a button. Rapid access to information means they can save valuable work time.

## **4.14 Implementing CRM in Copotronic Info Systems Limited**

In order for a CRM strategy to be successful, it needs to be implemented systematically. This is where the Copotronic Info Systems Limited Project Method comes in: clearly defined steps ensure our project is executed quickly and effectively and means that we will be reaping the rewards in no time. The Copotronic Info Systems Limited Project Method highlights the following factors as being key to a successful CRM implementation project:

- Senior managers need to fully support the implementation of CRM
- All employees need to be informed about and involved in the CRM project from day one
- All those responsible from all areas of the company need to be fully involved
- All areas of responsibility need to be clearly defined
- All corporate processes must be clearly defined
- Step-by-step implementation of CRM by department or by function

### **Bring everyone on board:**

Bring on board as early as possible all those who have been involved in the relevant CRM processes up to now. This way we ensure that our CRM project benefits from all available CRM expertise and knowledge. As well as the CRM project manager, we will need to include the head of IT and key users from various departments such as sales (office and field), marketing and customer service.

### **A method to management:**

To ensure our CRM implementation project runs smoothly from day one, all areas of our company are analysed in advance – and the project's goals defined and communicated. As part of the Copotronic Info Systems Limited Method project methodology, devised by Advanced Information Management Solutions Limited CRM, each area of our company is analysed during a workshop. In addition to the organizational and process-relevant workflows, we will also closely examine our existing IT environment. All key processes are incorporated into the project right from the start. This ensures the successful, step-by-step deployment of the CRM solution.

## **4.15 Six easy steps to get us started customer centricity**

### **Step 1: Customer centricity:**

- Anchor customer centricity in our company strategy.
- Get our whole workforce on board.
- Fill our CRM ideas with life.

### **Step 2: Contact data:**

- Keep our customer data up-to-date.
- Think in segments and distribution lists.
- Build a stable foundation for our CRM project by bringing all of our current customer contact data, leads, cooperation partners and suppliers together into one central database.

### **Step 3: The 360° view:**

- Create a 360-degree view of our customers.
- Save all of our minutes-of-meetings, e-mails, offers, contracts, payment transactions, appointments and complaints in the central customer dossier.
- Profit from the resulting transparency.

### **Step 4: The customer relationship:**

- Establish healthy customer relationships based on a comprehensive customer profile.
- React quickly and suitably to customer enquiries.
- Generate quotes that meet our customers' exact requirements.
- Remember to follow-up.

### **Step 5: The customer's response:**

- Surprise and impress our customers.
- Use the right contact methods.
- Use distribution lists to target the right people in the right way.
- Plan and implement multi-phase marketing campaigns.

### **Step 6: Unlock hidden potential:**

- Use key facts and figures as well as existing customer knowledge when making decisions about new products, services or marketing campaigns.
- Identify sales opportunities and then make good use of them.

## **4.16 Important Features of CRM in Copotronic Info Systems Limited**

### **1. Customer focus:**

#### **Consequent customer focus increases customer satisfaction:**

Customer focus and being in touch with our customers' needs are the key factors to success in every business's strategy. In order to guarantee high levels of customer satisfaction, it is now more important than ever before to ensure that all our business activities are aligned with our customers' requirements. This way sustainable customer relations are ensured.

Efficient customer care (CRM) increases customer satisfaction demonstrably: by reducing reaction times to customer requests, by improving the flow of information between all parties involved in the customer care process, and by improving the way feedback is managed. In short, CRM improves our customer service.

#### **Reasons why CRM systems improve customer focus:**

We offer professional software for our customer service that contributes towards improving our customer focus: our CRM software Advanced Information Management Solutions Limited genesis World. This software is tailored specifically to the needs of small and medium-sized companies and has proven itself as the market leader in CRM software comparisons.

Clever functions make internal work processes easier and thus improve customer focus. Each employee can view the complete customer dossier within just a few clicks, so they always have the information they need when a customer calls, and can create offers in no time at all, or forward enquiries to specific departments. As our software has been optimized for mobile devices, sales employees can always access all important information they need from any location at any time.

### **Measuring and analysing customer satisfaction is easy:**

The only real way to measure customer satisfaction is by getting direct feedback from our customers. Copotronic Info Systems Limited helps us with this task with the modules for online surveys. Using the data gathered from the surveys, we can easily calculate customer satisfaction and then link this data with the respective data records in the CRM system.

Copotronic Info Systems Limited also offers powerful functions for marketing and sales activities, for example by helping we select target groups or by analyzing opportunities and key accounts. Customer service is also given a great emphasis: the Helpdesk add-on module enables us to record and process support requests quickly and efficient

### **Use the full potential of our network with xRM:**

In the near future customer focus will not be the only important factor of success for our business, other crucial factors will include the following: ensuring that we provide the best help and care we can to all manner of relationships – whether to customers, employees, suppliers, the media, or even our competition. xRM - Anything Relationship Management – is the logical evolution of CRM. Copotronic Info Systems Limited Software AG also offers expert knowledge and multiple solutions for this new market. To ensure that in the near future these factors will be implemented into existing business processes, the most successful small and medium-sized companies in Europe will be using xRM solutions from Copotronic Info Systems Limited Software.

## **2. Customer acquisition:**

### **Successful customer acquisition with an efficient CRM system:**

In order to meet our customers' requirements, we have to know our customers. This applies to both customer relations with existing customers and also to new customers. When aiming for long-term success, companies need to focus on customers and their needs. A customer relationship management system (CRM) supports our customer management activities and helps us to maintain sustainable customer loyalty and new customer acquisitions.

### **Ways of acquiring customers:**

There are several ways of acquiring new customers, for example by cold calling. Cold calling is trying to acquire new customers, who have not had any contact with our business before. Often cold calling is done via telephone, but can also be done in person. The goal is convincing people of becoming customers. Warm calling is another way of acquiring new customers. Warm calling means that people have already had contact with our business. Warm calling is often more personalized, as some kind of data transfer has already taken place. Depending on what information resources are available, warm calling could also be done via email or other marketing channels.

### **Useful CRM functions for customer acquisitions:**

Advanced Information Management Solutions Limited offers various functions for customer acquisition. For example, by placing a contact form on our business website, potential customers can easily send requests or questions, or they could use the form to subscribe to a newsletter. Customer acquisition has never been so easy! We can use leads to record successful customer contacts and sales potentials. These leads can be qualified quickly and with ease and then transferred to address data records and any associated sales opportunities or projects.

### **Acquire new customers and build sustainable loyalty:**

By using sales visit reports we can document our customer visits in the blink of an eye. Visit reports are an excellent tool for customer acquisition, for maintaining loyalty, and for winning back customers. We can organize and structure all customer requirements and keep an overview with long-term storage. Another useful function is the Sales Funnel which helps we keep an overview of our sales process and therefore also the status of our customer acquisition. In this way, we can depict the different phases of a sales opportunity such as the information or decision phase, and then make realistic prognoses.

### **Managing sales and planning security using sales opportunities:**

Sales opportunities depict the whole sales process, every action with a prospect can be tracked, and we can define future activities, make turnover for Copotronic Info Systems



Limited and identify our most profitable customers. The Sales pro extension provides us with even more support for our sales activities, so that we can create comprehensive analyses of our sales opportunities and reliable for Copotronic Info Systems Limited that take factors such as competitors, processes, roles and the influence of all participants into account.

Do we have any questions? We would be delighted to advise on how our Advanced Copotronic Info Systems Limited CRM system could be implemented for our customer acquisitions. Contact us now for more information.

### **3. Customer care:**

#### **Success through sustainable customer care:**

Are we looking for an effective instrument for our customer care? Our CRM software makes customer care both easy and efficient. The following describes selected functions from our Copotronic Info Systems Limited CRM system, all of which help to make our customer relationship management child's play.

#### **Take better care of our customer relationships:**

Improve our customer care by clearly identifying our customers' needs and requirements through regular surveys using the Survey module. Responses to the online questionnaires are recorded in Copotronic Info Systems Limited and linked with the respective data records. This helps us to analyze our customer relationships exactly.

And in terms of service requests, our customers will benefit from more proficient customer care. With the Helpdesk module we can log and process support requests quickly and efficiently. Our employees can create service orders, keep an eye on product use and make agreements.

#### **Effective marketing campaigns through effective customer care:**

From campaign conception to execution and, finally, follow-up actions - with the Marketing pro module we will be able to adapt the multi-phase marketing campaign to suit our individual needs. We have already prepared templates for us that we can use for invitational and information campaigns. We work with current addresses from our CRM system and, as

efficient customer care convention dictates, we also store all of our reactions there too. When communicating with our customers, Copotronic Info Systems Limited also takes the preferred contact type such as (e-mail, post or telephone and so on) into account.

Our tip for efficient customer management: combine our contact data into clear and thematically organized distribution lists, this will help us to improve our interest-group campaign, event and newsletter targeting.

### **Professional customer management for events:**

Clear customer management is essential to professional event management. The Event Management module supports us throughout the organization of our events: from the planning stage through to the organization and execution phases. We can keep an eye on key data such as registration status, numbers of participants and remaining places or tickets. In addition, we can gather feedback on our event by using the online questionnaire feature and then capture this feedback data directly in our system.

## **4. Sales management:**

### **Sales management - simple and efficient:**

Sales is not just about managing our contact and customer data. Knowledge of the current sales figures and their development is just as important when it comes to decision making. Using Copotronic Info Systems Limited we will be able to sell more effectively, as we will have all the information we need - whether it be customer data, customer behavior, or our sales figures. Sales management has never been so easy and so efficient.

### **Support for tough decision making in sales management:**

A CRM system such as Copotronic Info Systems Limited forms the basis of fundamental decision making in sales management by displaying all relevant information transparently. With the Report Manager module we can analyze our customer relationships according to the greatest potential, calculate project viability, and make realistic estimations for turnover for Copotronic Info Systems Limited.

By using formula and business ratios that we can define ourselves, it is easy to gain a quick overview of key performance indicators. So in addition to the contact data, we can view other key data such as current service requests, the sum of all open invoices, or the total turnover for the current year. Another practical function is the proximity search, whereby all of our key accounts can be shown on a digital map within a specified area that we define. Efficient sales management also requires that customer visit reports be created easily, e.g. with a questionnaire via mobile phone.

In day-to-day business it is common that sales management often overlaps with other company areas, e.g. marketing. Depending on their performance, new marketing campaigns may lead to increased sales. At the same time, a sales manager may have suggestions about how to properly address potential/new customers, how to better sell certain products, or may also have information about customer needs that could be addressed by the marketing team. In order to keep track of this vital data and to maintain customer focus, a CRM system that can combine different sources of information and that can support interdisciplinary company development is a great help.

### **Successful sales management thanks to clever functionality:**

Copotronic Info Systems Limited offers a number of options for successful sales management, e.g. increased efficiency and planning security with various possibilities for analyzing opportunities. All sales actions, from the first contact to the offer, from the conclusion of a sale to after sales, are recorded together with the customer's details in the CRM system, so that the whole sales process is documented.

Using the Sales Funnel diagram in the Sales Pro module, we can easily see what the next activity should be concerning each customer. This is incredibly useful as we can see at any time where we are in the sales process, what steps need to be carried out next, or what resources we have available in terms of employee planning and so on. When recording working time and expenses, our sales reps can allocate costs directly to the respective customers and projects.

## **Optimise our sales and customer satisfaction with CRM:**

Conducting surveys with our customers directly is an important part of sustainable sales management. Are our customers satisfied with our business, products, and services? With the survey module we can start conducting regular online surveys; the results flow directly into our CRM system where they can be analyzed.

## **5. CRM comparison:**

### **Copotronic Info Systems Limited Genesis World: Market leader in CRM comparisons:**

Do we want to give our customer relationships a new, more personal touch? Are we looking for CRM system that will support we like a reliable partner? As a CRM solutions provider with many years of experience, we know exactly what matters to we. This is why we developed Copotronic Info Systems Limited Genesis World, our market-leading CRM solution. Recent studies from i2s, the Zurich-based market research and consulting house, showed how Copotronic Info Systems Limited performed in a CRM comparison with other providers, whereby Copotronic Info Systems Limited demonstrated the best performance in all areas of customer satisfaction.

### **Compelling reasons for leading CRM provider**

In a direct CRM comparison, we will see that there are many good reasons to select Copotronic Info Systems Limited genesis World. Besides the high levels of customer satisfaction, we exceed expectations as a CRM provider because of high levels of functionality and customizability, but also through the faultless interaction of other software solutions. A well-engineered, multiphase rights system enables secure and user-friendly role management for users, groups and roles. And we can always access our customer data anytime and from anywhere. A CRM solutions provider selects and supports outstanding customer focus.

As a professional CRM provider, our products are focused on an outstandingly effective customer orientation experience. This helps us to better understand our customers' expectations which could be clear or obscure, but either way, we will be able to meet or even

exceed them. Our vision, is to ensure that: “The most successful small and medium-sized companies make use of our market-leading CRM solutions for profitable customer relations”.

### **Successful CRM providers: overview of awards:**

Copotronic Info Systems Limited Software AG is synonymous with the highest levels of professionalism and a process of continual improvement. And it shows, having won the prestigious "Innovator of the year" award twice in the TOP 100 innovation competition. But as a CRM provider, we are particularly proud of the success of our customers. Our customers have already won the CRM Best Practice award an astounding nine times – these are projects that have been selected by *acquis* magazine and the CRM-expo trade fair for being particularly well-planned and successfully implemented. Of course, for us as CRM providers this is the ultimate compliment (we will find an overview of all the awards here).

### **6. CRM consulting:**

#### **Individual CRM consulting from our expert team:**

Whether we have a question on a suitable product, or on how to ensure a seamless CRM implementation, or even a question on a specific CRM project, then we can be sure of a personal CRM consultation with us, tailor-made consultations that fit our needs. Our experts will go through all of our questions with us before showing us any possible solutions. CRM consulting, we can trust.

#### **All-round support for our CRM implementation:**

For us, Customer Relationship Management means so much more than just giving us a suitable software solution. We support us throughout the CRM implementation so that we can systematically align our customer processes to reflect sustainable customer management. Because, the only way to increased customer satisfaction is to pro-actively manage our customer relationships which ultimately leads to our long-term success.

#### **Scope of our CRM consulting:**

Our CRM consulting encompasses all the relevant aspects of Customer Relationship Management for example:

- Analysis of our CRM goals to form a foundation, followed by product presentation built on this foundation
- Support of a smooth CRM implementation using our Copotronic Info Systems Limited Project method
- Tailor-made training courses and workshops either in-house or at our headquarters in Karlsruhe
- Individual customizations and further developments of our software solution (e.g. realizing new interfaces)
- CRM project management support

**Our free webinar completes our professional CRM consultation:**

Our free CRM webinar compliments the complete CRM consultation approach we provide, and offers us an excellent overview of Customer Relationship Management. Take part in our "Introduction to CRM" webinar and discover what's hidden behind the CRM acronym, what new opportunities a professional customer management system offers our company, what processes can be optimized and, which areas in our company would benefit most from a CRM implementation.

**7. CRM Groupware:**

**Groupware promotes efficient cooperation in our teams:**

Groupware has established itself as an integral part of modern office communications. The term was coined from "Group" and "Software" and is used to refer to any kind of collaborative software solution that makes work processes in teams simpler and more efficient. Ideally, Groupware is used where people have to work around spatial and temporal distances, for example, when common appointments have to be coordinated, tasks have to process or contacts and addresses have to be managed. Typically, Groupware solutions include programs such as those used for e-mail, appointment scheduling, document management, databases and much, much more.

### **CRM Groupware: intelligent-intermeshed team and contact management:**

Successful companies work with software solutions that combine collaborative working and effective customer and contact management intelligently. What we can offer us, is an integrated CRM Groupware experience that very few other CRM systems can boast. Advanced Information Management Solutions Limited has its own appointment and task management features which not only meet individual requirements, but which are also independent of PIM software from other manufacturers. In addition to the standard functions, one of the many features of our own e-mail client is the ability to send data records such as documents, projects, tasks or addresses directly from Copotronic Info Systems Limited as well as automatic archiving for the associated contact in the dossier. Other standard Groupware functions include holiday management and a blackboard feature.

### **Groupware software with a well-engineered rights concept:**

A well-engineered and fine-grained rights system is key to an effective Groupware system, especially for document management. Throughout Advanced Information Management Solutions Limited we can define rights exactly, for example, we can define who gets to see, read or edit documents. Working with documents collaboratively is child's play, with features such as access locks and versioning. And a seamless integration with MS Office is included as standard, in fact the delivery package includes customizable templates and online formulas. The document life cycle enables us to define a release process through which we can channel our documents.

### **Teamwork includes additional Groupware and collaborative functionality**

The teamwork module offers expanded Groupware and collaborative functionality. We can store our company information and data in the system and then access it later via an Internet browser. We can adapt the skin to suit our company's requirements.

## **8. Data quality:**

### **Increase customer satisfaction by improving the quality of our address data:**

The quality of address data is especially important in customer and contact management. As it is often the Copotronic Info Systems Limited that customers cannot be contacted immediately, because their contact data is too old or incorrect, and the time needed to check and update details often results in considerable costs. Duplicates are another problem that affect data management, typically duplicates are characterized by similarly named address data in the system which has been maintained more than once and which refers to the same contact. CRM systems help us to keep the quality of our address data at a high level, which has a positive effect on the quality of our customer relations.

### **Easier address imports promote error-free data management:**

Our CRM system, Copotronic Info Systems Limited offers a range of practical functions for improving our data quality. When managing our address data, we can benefit from the auto complete function, so when we enter an address that fits the postal code, the city or town and the state are completed automatically for us, this also works with the form of address and salutation which are adapted to suit the title and first name/second name, similarly the bank details and BIC numbers are entered that match the bank sort code - all of this is done automatically. Not only does this reduce the time and effort involved in managing data, but it also reduces the margin of error.

Another useful function is the address wizard. In the blink of an eye, the address wizard can help us to record new contact information, for example, by taking the address data from the legal page of a Web site or extracting the data from an e-mail signature. This clever wizard recognizes the component parts of an address and then extracts the data to the respective fields in the CRM system address mask.

### **The duplicate check avoids duplicate address data:**

Copotronic Info Systems Limited also carries out an additional background check for duplicates on any new address data that we enter, thus the system checks to see whether or



not a contact already exists in the CRM system as a duplicate. This prevents mail merges and mail shots or even Christmas cards from being sent out twice.

### **Central address management with regularly updated customer data:**

Define mandatory fields and make sure that no fields are empty - especially with respect to data protection regulations. Address checks and enrichment also ensure that we always have the correct address and contact data for our customers. In the process, we addresses are compared with a reference database and any differences or discrepancies are displayed.

A notification and action service also ensures process security: this is done by automatically checking any data records with incomplete, or incorrectly completed data fields, the service can be set up to notify an employee we nominate of any changes.

## **9. CRM online:**

### **CRM online – Convenient web-based CRM solution:**

Processing power and fast Internet connections are both affordable and widespread, so why not take advantage of this situation and combine both CRM and being online? The advantages of online CRM systems over offline CRM solutions will be illustrated below.

### **Advantages of online CRM solutions:**

#### **No local installations necessary:**

If we have decided to implement a CRM system in our company we might run into software problems and hardware incompatibilities. However, when using a CRM system online we do not have to worry about any of these difficulties. All we need is an Internet connection, and our employees in marketing and sales management can instantly start working with the program. Online CRM systems require neither any downloading nor any local installing. Any configurations we make are instant, and we do not have to worry about having different settings or program versions on other computers. With specific access authorization we can make sure that every single employee, customer, or guest can access only certain areas within the online CRM system.

**No specific browser or device needed:**

We can use any browser of our choice on any device we prefer. Imagine a salesperson on the way to a customer. Unfortunately, he is late for his appointment, so he needs to make a phone call. Instead of having to worry about on which of his/her many phones he/she stored the telephone number, he/she logs into the CRM system app with his/her smartphone and quickly finds the necessary information. This means that our information is accessible from any device with an Internet connection, no matter what browser or operating system we are using.

**Full cost control:**

As mentioned above, online CRM systems do not require local installing or any other software integrations. They also do not need backups, maintenance, or manual updating and upgrading. Servers or other hosting solutions are also not required. All these factors help to save money which we can invest otherwise.

**Cloud solution - access our data anywhere:**

One of the greatest advantages of CRM online is being able to access our data in the Cloud from anywhere. No matter where we are or what kind of device we are using – as long as we have access to the Internet, we can access all of our stored information from our CRM database at any time. Even more useful is the fact that all entered data is synchronized with everyone who uses the online CRM.

**CRM online and the xRM trend:**

Especially with the trend of xRM (Anything Relationship Management), gathering and processing vast amounts of information now benefits significantly from an online solution. With more and more information being gathered, and more and more people being involved in relationship management processes it is vital that all information is stored centrally, synchronized in real time, and accessible from all over the world.

## **10. CRM database:**

### **CRM databases – characteristics and advantages:**

Not only large companies can benefit from CRM software – customer focus and therefore customer management is especially important for small companies. CRM databases are an excellent way of keeping track of all customer related processes and are the basis of customer relationship management systems.

### **What is a CRM database?**

A CRM database does not differ very much from common databases. The main idea of customer database software is to store data from several sources, so that different employees and departments can access the same information. Databases need to have several characteristics in order to be both useful and functional. All information needs to be saved correctly and without e.g. spelling mistakes. There should not be any redundancy, and (especially in the area of CRM) customer data needs to be clearly identifiable, e.g. with an ID as a unique identifier.

### **Why is customer database software important for my business?**

Not only small businesses often struggle with large amounts of data generated from all sorts of sources. In the worst Copotronic Info Systems Limited, data is saved separately in different departments or even on individual computers and hard drives. It is no surprise that communication between departments can be a problem when data is not consistently saved. Having a central storage for all relevant data can solve several problems of our business:

1. Easy data cleansing. The best Copotronic Info Systems Limited scenario is that data cleansing is not necessary at all. When every department has its own set of data, data cleansing is much more complex.
2. Useful system integration. Communication with customers in day-to-day business is often done with a variety of software systems. When a CRM database is linked to e.g. our e-mail programme, all relevant information from our conversation with the customer can be directly transferred to the database of our CRM system. If other employees are in contact with the same customer, they can access the already existing

data in the CRM database. This way the possibility of redundant data is significantly reduced.

3. Data security. Concerning security, keeping centrally stored data safe is easier than managing the integrity of several data storages. When dealing with customer data it is also necessary to comply with privacy regulations. With a CRM database it is no problem to control different database accesses for certain employees, depending on which kind of information they need or areas they are allowed to access.

But regardless of all advantages, employees still need to make sure that they correctly enter the available information into the respective input areas. Of course it is also possible to import already existing data from sources such as contact forms, e-mails, or digital address books. As mentioned above, when importing data into our CRM database we need to make sure that there is no redundant data.

## **11. Contact Management Software:**

Without any form of contact management, important contact data can get lost in many areas of our business. Either the data is lost deep down in an employee's e-mail inbox which we cannot access, or the data is on a business card that can easily get lost in the office. No contact management means spending valuable time searching for addresses, telephone numbers, and business cards in order to react to customer needs. In the worst Copotronic Info Systems Limited we may lose customers due to inefficient customer care. With a professional customer management software, we no longer have to rely on e-mails and business cards, but can collect and maintain all necessary data in one place.

### **Characteristics and advantages of contact management software:**

When using contact management software (e.g. as part of a CRM system), our business can benefit from several advantages, such as:

- Collecting, storing, editing/updating, and easily finding centrally stored customer data (name, address, telephone number, e-mail address, etc.).
- Keeping track of all appointments and documents. As all data is saved centrally, editing data can be done by anyone in our business without creating duplicate files. This makes sharing and synchronising information very easy, all vital data is always up to date.

- E-mail integration. This allows us to easily transfer data from e-mails to our contact management software.
- Conversation management. Keep track of our message history with certain customers and identify sales potentials.
- Mobile access. If our contact management software is a cloud-based solution, our sales team can access all necessary information with their mobile devices.

### **Using contact management software for lead management in our business:**

Using a contact management software to manage our customer data is great, but using the software to manage sales opportunities is even better.

Lead management is systematically turning potential customers into actual paying customers. The marketing team generates leads (e.g. through marketing campaigns) which are taken over by the sales team. In order to organize all relevant data along the process from sales lead to paying customer, it is important to continuously keep our customer data up to date and to analyze the actions and reactions of the sales lead. Lead management can help generate further leads, offer added value, and optimize response rates.

Our streamlined CRM software is the basis for effective contact management and lead management in our business. The CRM system Advanced Information Management Solutions Limited incorporates all necessary features for successful contact management, especially for small and medium-sized businesses.

## **Chapter-05**

### **Problems, Recommendations and Conclusion**

## **5.1 Problems Identified**

- 1) This software is secure but the contained data kept at a centralized point which creates a threat to any organization executing a CRM solution. Few queries are unanswered like what does it happen if the power goes out to the database.
- 2) Introducing another CRM solution can be extremely energizing. Automating many procedures and streamlining the information that received each day can make business executives giddy on occasion. At that point comes the procedure of usage and everything changes.
- 3) Although this software solution is secure, the fact that the data is contained at a centralized point creates a threat for any organization implementing a CRM solution. It doesn't even need to be a data hacker that causes problems.
- 4) Installing a new CRM solution can be very exciting. The idea of automating many processes and streamlining the data that is received every day can make business executives downright giddy at times. Then comes the process of implementation and everything changes.
- 5) Many CRM systems will automatically back themselves up through the Cloud or through some other solution, but not every system does this.

## 5.2 Recommendations

- 1) There should be an encryption safeguards, backup, and supervision system so that the data maintain its integrity.
- 2) It needs investment for individuals to figure out how the new framework functions, what its abilities happen to be, and how we can use to achieve success. Once everybody gets used to the framework, it will be easier to use.
- 3) There must be encryption safeguards, but there must also be backup and supervision systems in place so that the integrity of the data can be maintained.
- 4) It takes time for people to learn how the new system works, what its capabilities happen to be, and what it can be used to accomplish. Once everyone gets used to the system, the benefits can be enormous. It's that training period after installation that can be a killer.
- 5) There may be a need to manually back up the data and if that doesn't happen on a regular basis, there is a good chance that data can get lost. Even Cloud systems can fail if there is a problem with the internet connection or the server on the other end.



### **5.3 Conclusion**

The discussion so far has proved that CRM has become indispensable to businesses in their quest for outstanding customer relationship management in the categories of customer satisfaction, customer delight and customer “wow” are terms that are frequently used to describe the heights to which businesses can attain in their customer management process.

It is evident that actualizing these superlative levels of customer satisfaction is possible with the use of CRM. The adoption of social media and integration of Web into CRM systems is bound to transform the customer relationship process.

Finally, with Big Data and Predictive Analytics, the entire customer management process is being revolutionized and this is where the future of CRM lies. In conclusion, customer delight and customer wow are no longer simply superlatives in the dictionary but meaningful and easy to actualize with the use of CRM.

More than 100000 satisfied customers work with our CRM solutions on a daily basis. Many of our customers have received the CRM Best Practice Award for their successful CRM projects. Find out more about our customers' success.

From the point of view of marketing, Social CRM is an ideal addition to other marketing channels. At the end of the day it is not only important to acquire new customers or to have many loyal customers – a business is often also interested in having customers that act as ambassadors. This means that people who are convinced of certain products and services are more likely going to recommend them to family, friends, and relatives. The people who further advertise a company’s products and services can therefore even be seen as the best free marketing tools.

Customer channels have to be identified before a business can build and manage its customer relationships via social networks. Once this has been done, businesses can fully benefit from Social CRM. Nowadays customers tend to use the social networks to share a lot of information about themselves and talk about their interests on e.g. Facebook and Twitter. The challenge that businesses face today is how to gather and use this information for future communication.

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