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1.0 Introduction

1.1 Purpose of report

The purpose of this interim report is to enable the NP Supervisor to have a better understanding of how Customer Relations Management supports the adoption & usage of CRM functionalities for Stone Forest IT, as well as to analyse the contributions that I have made thus far.

1.2 Scope of report

This report provides an overview of Stone Forest IT, the duties and responsibilities of the Customer Relations Management Department. It will describe how this integrates into the overall organisational structure. The report will also include the task that has been assigned to me as well as the learning experiences that I have acquired. The display of application of knowledge gained through this internship would be compared with what I have relatively learnt in Ngee Ann Polytechnic.

1.3 Research Methodology

The main research methodology used in this report is through primary research. Mostly based on the daily interactions and face-to-face conversations as well as personal observations and analysis. Secondary research are gathered from user guides, company websites and fiscal reports which enhances the primary research.

1.4 Limitations of research

One of the main research limitations includes the high security of the company's information. As Customer Relations Management (CRM) database is the storage of the company's client, it is crucial that the safeguarding of company's confidential data is in place. Thus, the exportation of data from one platform to another may be of a hassle and authorization of exportation must be approved before one can handle the data in the CRM. However, most tasks assigned to me are based inside the CRM and different departments rely on us to retrieve the information/

editing the data in place. This poses a challenge to me as an intern as I have limited authority over what I can do in CRM.

2.0 Overview

2.1 Overview of Group of Companies

Stone Forest IT

Stone Forest IT (SFIT) is the IT services arm of the Stone Forest group, while its CPA Practice, RSM in Singapore, is a member of RSM International, the world's 6th largest accounting and consulting network with a global reach of over 800 offices in 120 countries. Together, they form the largest accounting and business advisory group outside the Big 4 in Singapore, with a total staff strength of over 950 in Singapore and another 320 staff across 6 offices in China. With a total headcount of 60 comprising Certified System and Network Engineers and Sage Certified Consultants, SFIT primarily offers Sage 300 (formerly known as ACCPAC), Sage X3, Sage CRM, IT Infrastructure and IT Security solutions. (<http://www.stoneforestit.com.sg/about-us/about-sfit.html>)

RSM

RSM in Singapore is a member of the RSM International network of independent public accounting firms providing assurance, tax and business advisory services. We serve internationally active businesses and companies aspiring to go global.

Building a presence in Singapore since 1985, we have been providing a comprehensive range of services, including audit, tax advisory & compliance, company formation & global compliance, corporate risk advisory, valuation advisory, and corporate finance. In addition, we provide business solutions through our Stone Forest group of companies

for our clients' non-core yet important areas of their business so that they can focus on the core revenue-generating aspects. With a total staff strength of over 950 in Singapore and 320 in China, we are the largest accounting, business advisory and solutions group outside the Big 4 in Singapore.

Our lines of service are also strategically aligned to industries to provide clients with more insightful, practical and effective advice. Focusing on growing businesses, we help our clients improve their profits, enhance their business value and chart their growth strategies for cross-border expansion.

Our clients come from a wide spectrum of industries such as real estate & construction, NPOs, retail, F&B, financial institutions, and private equity firms. We have also built up a strong reputation for successfully helping Chinese companies set up operations in Singapore to further expand in the region as well as assisting Singapore-based companies in entering the China market.

As a member of RSM International, the world's 6th largest accounting and consulting network, we have a global reach of over 800 offices in 120 countries. (<http://www.rsmsingapore.sg/who-we-are/about-us>) (Refer to Appendix 5 for organizational hierarchy.)

2.2 Overview of Customer Relations Management

The CRM department plays a major role in supporting RSM Stone Forest and supporting business support with integrated functionalities and database converged. One of our services Dynamics CRM is depicted in Appendix 1. Some of the key roles and responsibilities that the CRM department perform include the following:

- A) ***Enables Sales Teams to take advantage of hidden cross-sell and up-sell opportunities.***

- B) *Minimises customer defection.
Protects existing revenue streams.*
- C) *Pre-empts expectations and helps to deliver exceptional customer experience.*

3.0 Job Description

3.1 Intern's role contribution

There are two main roles that I was tasked with:

1) System Administrator

The maintenance and enhancement of the MS Dynamics CRM enterprise system, the creation of working training materials such as user guides as well as testing of training materials in CRM.

As an intern I typically consolidate customer information and documents into a single CRM database so business users can more easily access and manage it. Other functions include recording various customer interactions, automating workflow processes, prospecting on leads and sales opportunities and even giving managers the ability to track performance and productivity.

In short. It is the integration of marketing, sales, customer service, and customer information tools together in an entirely Web-based package.

Main functions within Dynamics CRM are;

- Contact Management (Create & update customer information, find relevant information quickly)
- Communication Management (Schedule reminders/appointments, assign, reassign, delegate workload)

- Document Management (Create letters & email, attach documents to communications)
- Sales Management (Track opportunities along sales cycle, record and maintain history of progress update)
- Customization (Set up personalised dashboard, change look of UI, maintain higher priority CS issues)

In Stone Forest, CRM revolves around three areas, primarily sales at the moment;

1. Marketing
2. Sales
3. Customer Service

Marketing

- Collecting data

Sales

- Managing activities
- Managing sales pipeline

Customer Service

- Managing Cases
- Delivering services

As system administrator, the roles are mainly;

- First-level user support.
- Periodic customization tasks, such as maintenance and template modifications.
- Occasional advanced customization tasks such as changing selection lists and screen layouts.
- User administration.
- Housekeeping and backup/recovery tasks.
- Data security

Including

- User Setup – Set up new user, give user info manager rights, change user details, preferences and security rights view user activity history, reassign records and deleting user.
- Manage security – Set up security profiles, assign profile to user, deleting security profiles, assigning, maintain and implementing of territory, password policies and security policies.
- Manage user activities – view user activities, enable locked out users to log in, archive user activities records, and run user activity reports.
- Changing user configuration settings
- User templates – Creating, setting up, deleting, and changing user templates and user preferences
- Creation and customization of standard, classic dashboard
- Customization of field, screen, list, tab, and view
- Changing of external access settings
- Customization of summary reports – both header content and report list output
- Creation of notification – quick notification, onscreen notification and email notifications
- Workflow customization – Configuring the system for Workflow, creating workflow state, setting up rules, defining JavaScript condition, add and set up of escalation rules
- Deduplication – enabling and customizing deduplication, creating match rules
- Data upload – Import file to CRM database
- Enable multicurrency support and sales forecast configuration
- Configure Email, embedded Email editor implementation and Email management
- Document and report configuration
- System settings

2) Administrative Duties

Business Support

As Business support, the roles are mainly;

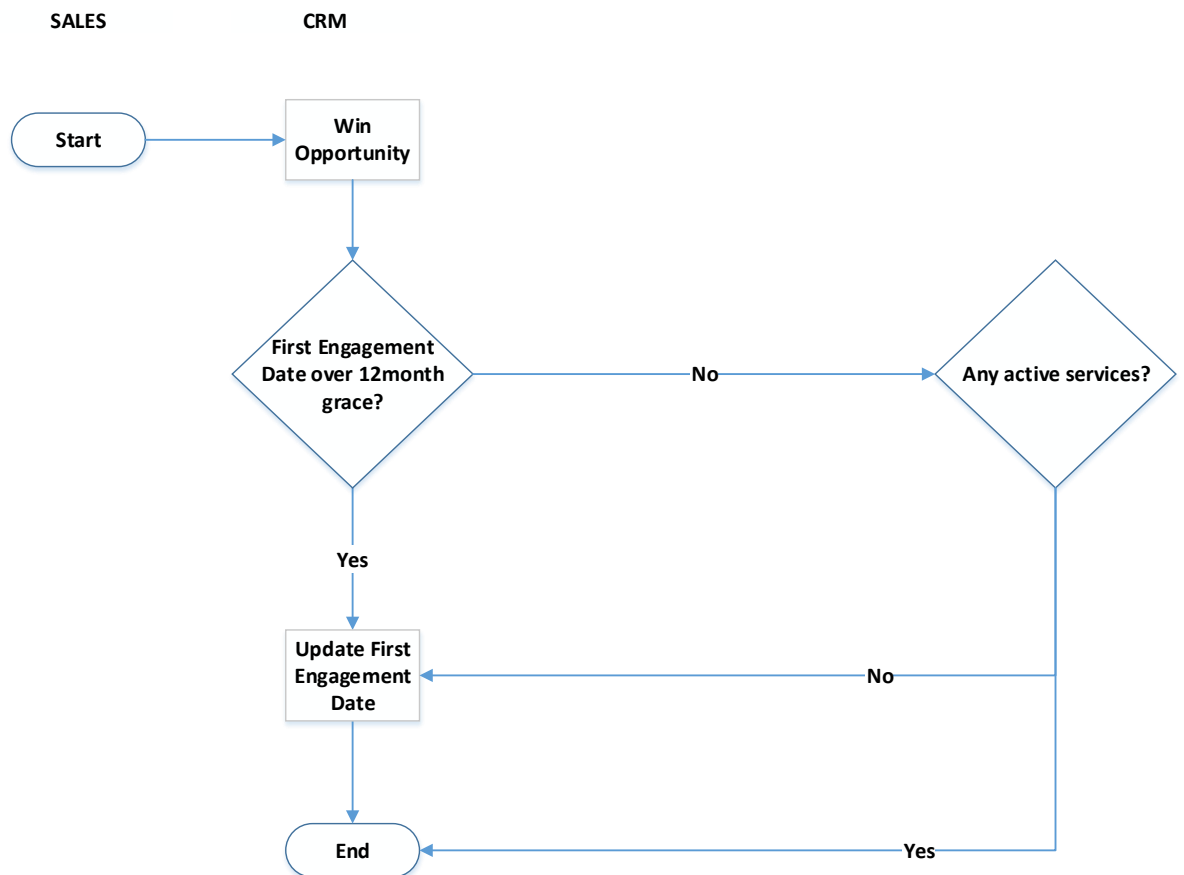
- Paper work support.
- Crafting of contract templates that are made for mailing to clients
- Customized contracts data entry into customer contracts database
- Schedule internal meetings/ meeting room setup

Including

- Administer TSC (including new login accounts creation)
- TSC Contracts Management (except HLS)

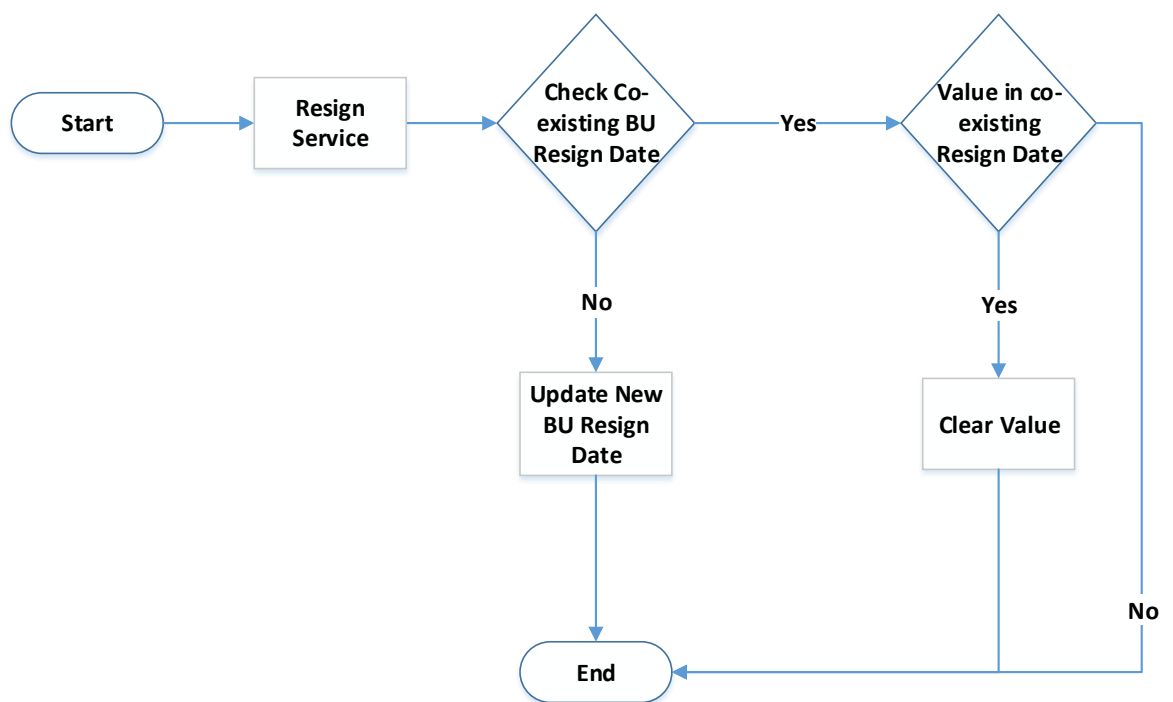
3.2) Diagrammatical Presentation of Task

Based on the above description as an intern, one of the workflows that I have come up with is crucial for the company. It is the creation of opportunities in the CRM database, which we will be using to determine our client's very first engagement services with us as well as periodical resigned services. The below appendix 3A shows how an opportunity is first born.



Appendix 3A

After an opportunity is updated, in the future there would be more services engaged with the same firm/client. Therefore, it is important to continually update the resigned services of previous services given. This is to allow the firm to track based on records, the period in which the client has engaged us for services.



Appendix 3B

4.0 Learning Experiences

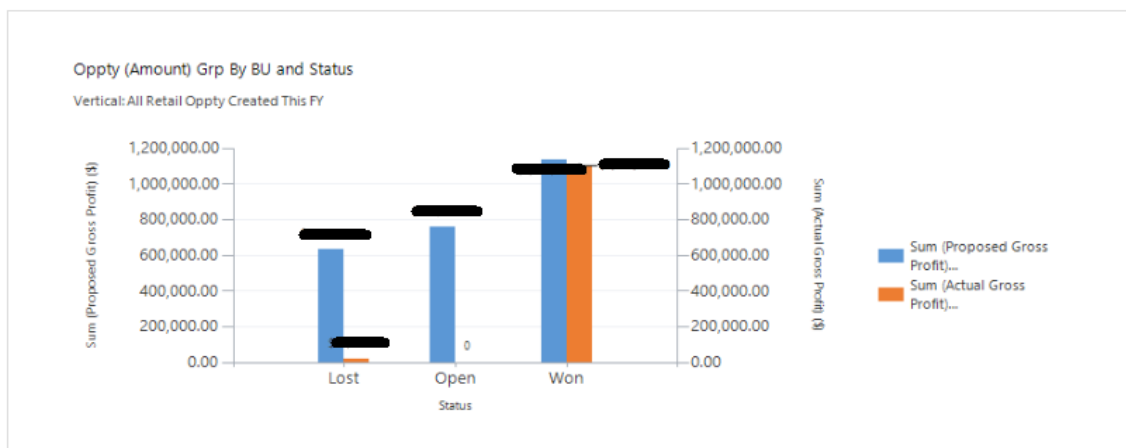
4.1 One key learning experience (Technical Skills)

Microsoft Dynamics CRM Customization features

One complex technical skills I've learnt within the CRM is to customize the features such as the Dashboards, verticals, views, forms and charts etc. These are the type of features Interco organizations rely on, in order to track their monthly milestone to better plan their goal setting for the fiscal year.

It was rather tough to understand how the back-end worked initially, like how the different variables sum up together. It was also a tedious task as there are many organizations and a plethora of factors involved in a variable. An example would be to determine the Primary Verticals of a company, in order to identify the different companies with different verticals, each different verticals are assigned with a particular dashboards. Having up to 7 or 8 different verticals means I have to customize accordingly. (Appendix 4A & 4B)

VERTICAL-RETAIL DASHBOARD ▾



Appendix 4A

VERTICAL-PEG DASHBOA

EXCO DASHBOARD
HOD (Actual Billing From ACCPAC) DASHBOARD
HOD : MTHLY MTG DASHBOARD
HQ FINANCE DASHBOARD
HQ MARCOM: Data Verification
HQ MARCOM: Reporting Dashboard
Monthly CleanUp
RP (TCT & PL): Monitoring
SBA: DASHBOARD
Server-Side Synchronization Performance
SFIT: Sales Meeting Dashboard
TAX DASHBOARD
TAX TP DASHBOARD
VERTICAL-CPG DASHBOARD
VERTICAL-F&B DASHBOARD
VERTICAL-FS DASHBOARD
VERTICAL-HEALTHCARE DASHBOARD
VERTICAL-INDUSTRIAL DASHBOARD
VERTICAL-LOG & TRANS DASHBOARD
VERTICAL-MINERALS, OIL & GAS DASHBOARD
VERTICAL-PBS DASHBOARD
VERTICAL-PEG DASHBOARD
VERTICAL-REC DASHBOARD
VERTICAL-RETAIL DASHBOARD
VERTICALS: DASHBOARD

Appendix 4B

Configuration in CRM is a necessity - as different users have different types of needs and authorization. Such as configuring the security roles assigned to users. They would then have limited access or full authorized access to certain functions in the CRM. This is a critical role as confidentiality is involved and some company information is sensitive and should not be allowed for any employee to view. Thus, I'd be tasked to update should there be any changes done to the security roles. (Refer to Appendix 4C)

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Activity	👤	👤	👤	👤	👤	👤	👤	👤
Announcement	👤	👤	👤	👤	👤	👤	👤	👤
Application File	👤	👤	👤	👤	👤	👤	👤	👤
Azure Service Connection	👤	👤	👤	👤	👤	👤	👤	👤
Company	👤	👤	👤	👤	👤	👤	👤	👤
Connection	👤	👤	👤	👤	👤	👤	👤	👤
Connection Role	👤	👤	👤	👤	👤	👤	👤	👤
Contact	👤	👤	👤	👤	👤	👤	👤	👤
Customer Relationship	👤	👤	👤	👤	👤	👤	👤	👤
Data Import	👤	👤	👤	👤	👤	👤	👤	👤
Data Map	👤	👤	👤	👤	👤	👤	👤	👤
Data Performance Dashboard	👤	👤	👤	👤	👤	👤	👤	👤
Document Location	👤	👤	👤	👤	👤	👤	👤	👤
Duplicate Detection Rule	👤	👤	👤	👤	👤	👤	👤	👤
Email Template	👤	👤	👤	👤	👤	👤	👤	👤
Follow	👤	👤	👤	👤	👤	👤	👤	👤
Import Source File	👤	👤	👤	👤	👤	👤	👤	👤
Language	👤	👤	👤	👤	👤	👤	👤	👤
Lead	👤	👤	👤	👤	👤	👤	👤	👤
Mail Merge Template	👤	👤	👤	👤	👤	👤	👤	👤
Mobile Offline Profile	👤	👤	👤	👤	👤	👤	👤	👤
Note	👤	👤	👤	👤	👤	👤	👤	👤
Opportunity	👤	👤	👤	👤	👤	👤	👤	👤
Opportunity Relationship	👤	👤	👤	👤	👤	👤	👤	👤
Dev	👤	👤	👤	👤	👤	👤	👤	👤

Key	
👤	None Selected
👤	User
👤	Business Unit
👤	Parent/Child Business Units
👤	Organization

Appendix 4C

4.2 One key learning experience (Soft Skills)

Independence & Teamwork

My internship thus far with Stone Forest IT made me realize the importance of Independence.

Independence is essential in every organization, be it a large or a small firm. It is relative to the amount of productivity – reason being it allows one to learn quickly and be more self-driven.

Teamwork is equally important in my department, as every individual's capabilities and strengths unite to pool ideas together to develop new ideas or improved solutions for the betterment of the CRM. Being a close knitted team, I was able to learn a plethora amount of technical skills with regards to CRM.

I witnessed and experienced the department's teamwork being put to the test, as we attempt to meet deadlines of other departmental needs. The entire department has to be swift in their work to ensure that deadlines are met, they are usually implemented very quickly after being prompt for assistance. Thus, it is vital for us to work closely together as to ensure that the tasks are completed quickly without compromising on quality. Another example of teamwork was demonstrated when my

colleague passed me a task to export data from the CRM database to organize raw data for data entry. Initially, I had the idea of using the MS Excel function of 'Vlookup' to narrow down duplicates/matching entries. However, after discussing with my colleague, he suggested to use 'Advanced Filter' instead to sift out anomalies which improved work efficiency and much more hassle free to implement.

I was able to relate this experience to the days when I was in school discussing a project with my team mates. In the previous semester, we had to cooperate with one another to accomplish projects, with a strong team work and complementary skill set, we were able to help one another think beyond our own boundaries. Maybe a suggestion from someone else would be better than my own. By working together, we were able to meet deadlines and accomplished a desired outcome that cannot be accomplished alone. Thus, I believe that none of us is as smart as all of us, only together will we be able to better ourselves.

5.0 Conclusion

My stay in the CRM department has been enriching and insightful thus far. Being entrusted with numerous tasks and responsibilities within the department has provided me with many opportunities to better understand the CRM as a whole. The tasks allowed me to draw interrelationships of the different functions and each function/attribute are interdependent on one another. For example, under the big category Sales, Marketing & Service, the marketing committee has to gather leads through the hosting of events. The leads gathered are then entered into the CRM Database by me, which I will assign the opportunity to relevant department heads so they can follow up and close the deal. The CRM database is the primary source where other departments rely on to store and share vital information of a client, it is crucial that I enter accurate and precise information regarding to the clients. As a CRM Administrator, I play a key role in administering the CRM Database, to ensure that the company is able to follow up with the relevant leads.

Other than the technical aspects of this journey, I believe I have developed my character to better prepare for future challenges installed for me. Lately, I had been given a privileged access to Microsoft Dynamics Partner, which allows me to access

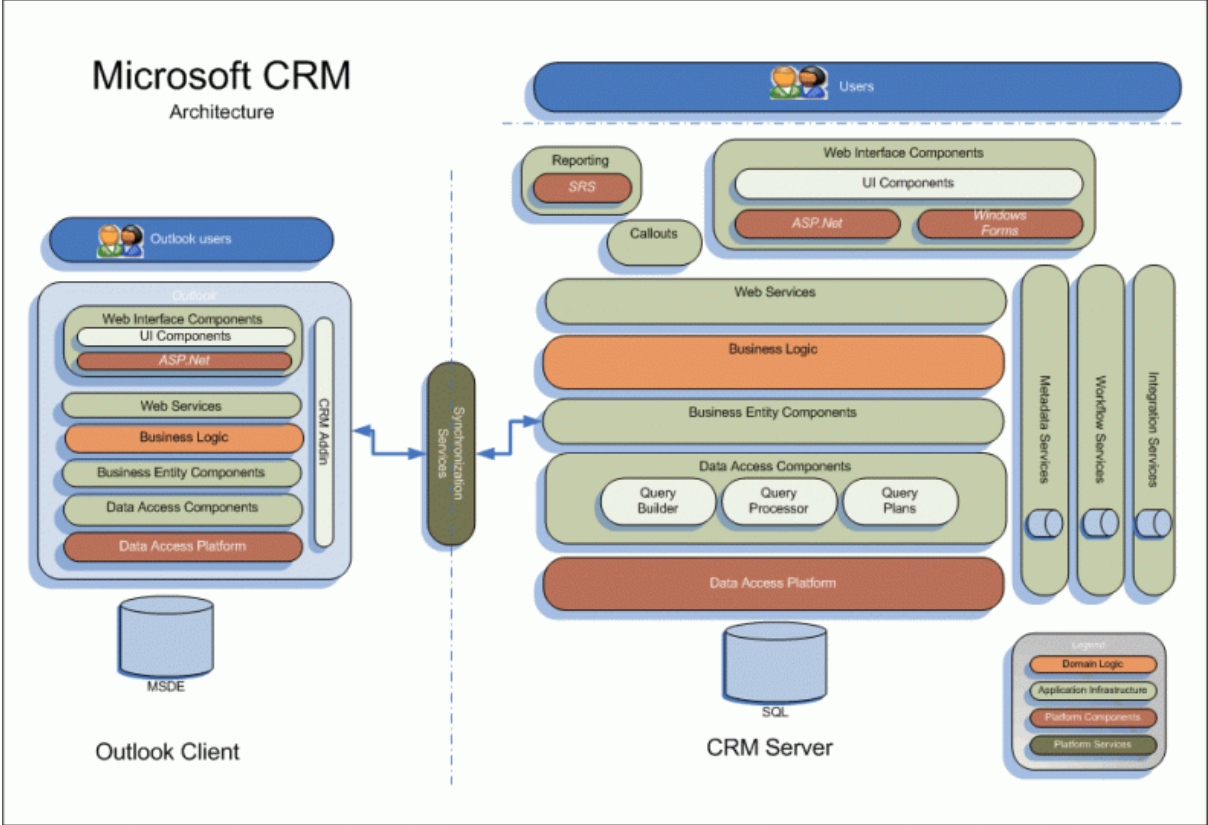
Microsoft resources to benefit from their e-learning and power point slides. With this new initiative, I believe I'll be able to expand my horizons on this field of expertise. Overall, this internship has allowed me to gain valuable insights into how a company's back-end work, and the invaluable experiences gained to make me a better intern.

6.0 References

RSM International About Us. Retrieved May 09, 2017, from <http://www.rsmsingapore.sg/who-we-are/about-us>

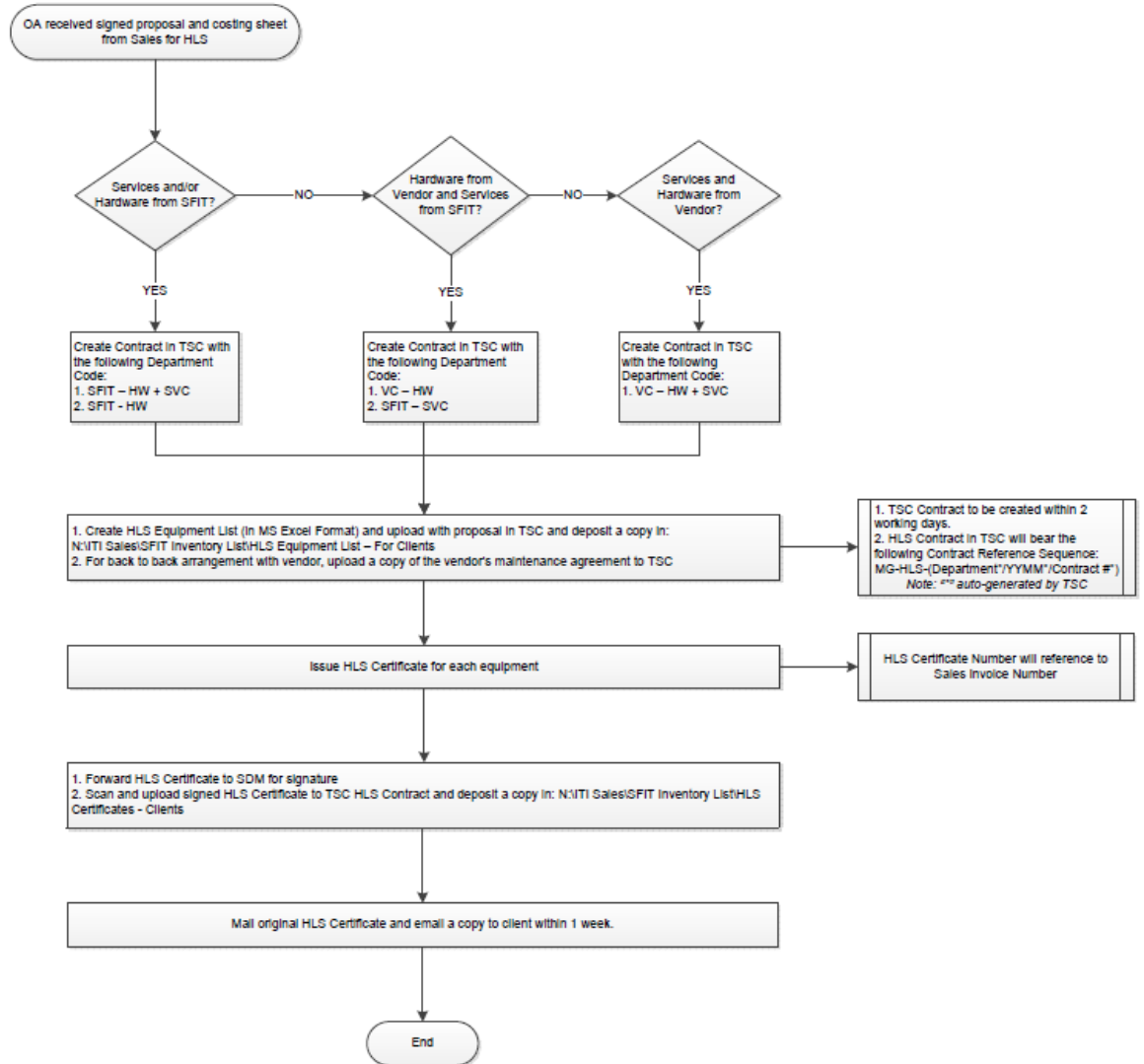
Stone Forest IT About Us. Retrieved May 09, 2017, from <http://www.stoneforestit.com.sg/about-us/about-sfit.html>

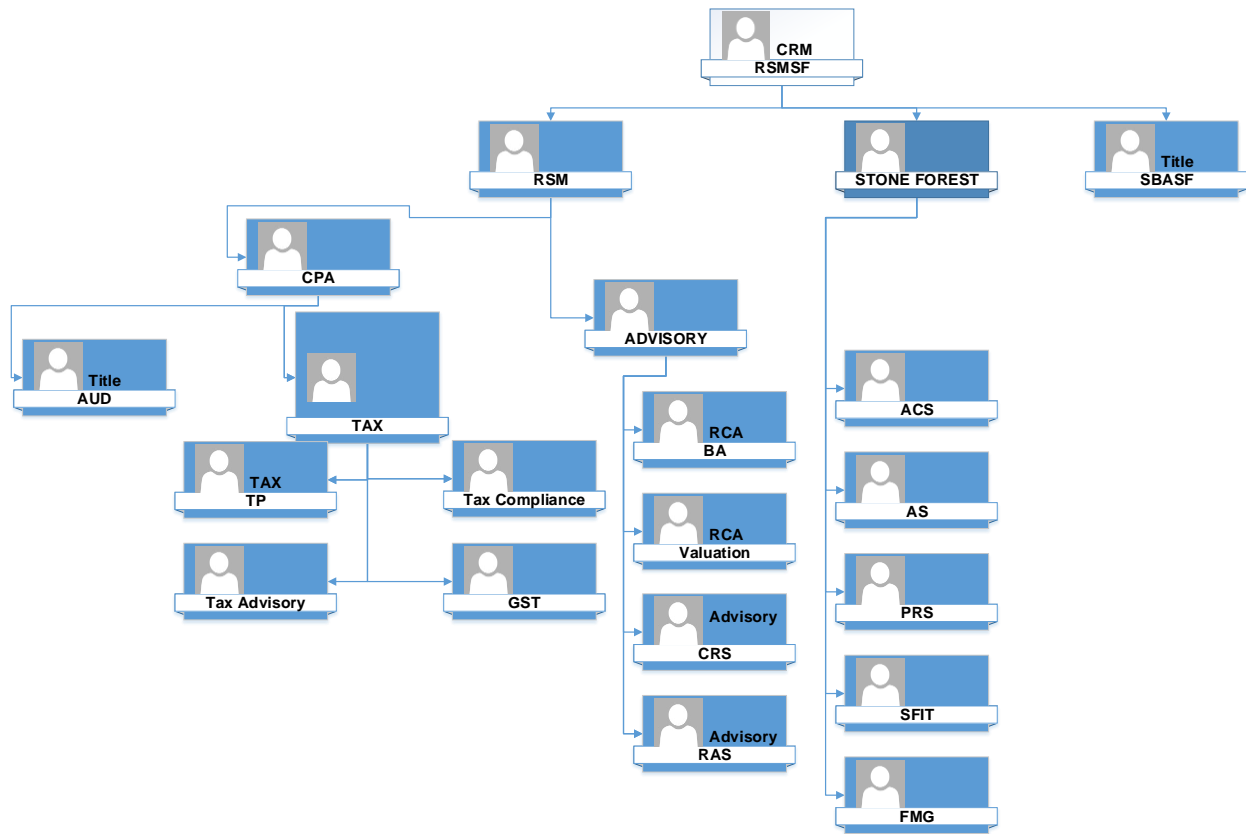
Appendix 1



Appendix 2

HLS Process





Appendix 5