

Report On
User Interface experience and its adaptation to Salesperson- A study on newly
developed CRM system

By
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An internship report submitted to the BRAC Business School in partial fulfillment of the
requirements for the degree of
BBA

BRAC Business School
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Declaration

It is hereby declared that

1. The internship report submitted is my/our own original work while completing degree at Brac University.
2. The report does not contain material previously published or written by a third party, except where this is appropriately cited through full and accurate referencing.
3. The report does not contain material which has been accepted, or submitted, for any other degree or diploma at a university or other institution.
4. I/We have acknowledged all main sources of help.

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Letter of Transmittal

Md. Hasan Maksud Chowdhury

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Subject: The Submission of my report on “User Interface experience and its adaptation to Salesperson- A study on newly developed CRM system

Dear Sir,

I am happy and honored to present the internship report which I decided to draft as one of the major component of my Bachelor of Business Administration program at BRAC Business School of BRAC University. During the past three months (between February 1st and April 30th) I was working hard and completed my internship in B-Trac Engineering Limited. I could make the difference both in practice and in theory during the period when I was an intern at B-Trac Engineering. In addition, the internship gave me a great opportunity to know more of the business culture. I hope you will find the report helpful and valid. The report was written within a short period since I had only been the intern at the place of work 3 months and there was much stress at the workplace. Consequently, the report might contain certain inconsistency. That is why I humbly ask to be understanding in this respect. I would like to say that I ought to be incredibly thankful to you on each and every one of your suggestions and advice which I hope to continue to receive in the following periods. Hence, I should be very glad, that you should receive my report, and the Remainder do I refer to your own good sense, and judgment

Sincerely yours,

Shehraj Osman

21104101

BRAC Business School

BRAC University

Date: 07.20.2025

Non- Disclosure Agreement

This agreement is made and entered into by and between B-Trac Engineering Limited and the undersigned student at BRAC University named Shehraj Osman for the responsibility to prevention of information disclosure of the firm's classified data.

Shehraj Osman

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BRAC Business School

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Acknowledgement

In the beginning, I want to acknowledge my academic supervisor, Md, Hasan Maksud Chowdhury sir, for guiding me through the completion of my whole report and managing to stay focused on my advancement on timeline. Because of the incredible information Sir has given me throughout the procedure, I had been capable of completing this whole report nicely. Secondly, I want to thank my on-site supervisor Gourab Istiaqur Rahman Sir at B-Trac Engineering, for giving me the opportunity to get expert help as well as the information I required to finish my assigned task. Furthermore, I would like to appreciate my sincere gratitude to each and every coworker at B-Trac Engineering for their unwavering cooperation throughout my quest

Executive Summary

In this research work, the experience of sales staff in B-Trac Engineering Ltd. regarding the adoption of a newly developed Customer Relationship Management (CRM) system has been investigated to determine how well its user interface has been customised and how it can lead to the overall growth in business operations.

This work was carried out based on the method of a structured survey and facts were received through sales employees about their level of familiarity, experience in using it, and efficiency of operation following the implementation of the system. It meant to get an idea regarding the actual user experience not only individually but also the overall outcomes of integration of CRM to the organization.

Evidence indicates that the majority of users have adopted the CRM app well and claimed that they did not feel any restriction with using it in their daily work. The interface was indicate by different reaction as being user-friendly and suitable with their workflow requirements. To several respondents, the system eased in managing leads, follow-ups, and customer information as it facilitated in easing the conduct of sales in high tension sales rooms hence boosting their confidence in utilizing their digital products at hand.

At organizational level, the CRM has led to a more coordinated process of sales, more precise data management on the customers, and the communication between different departments. It has also facilitated faster decision making based on availability of real-time data and exporting features as well. All these advancements have contributed to the increased efficiency in the operations and a more data-driven sales process.

Although the initial challenges faced by some users included discovering the system or adjusting to the new practices in the digital environment, they were associated largely with different learning preferences or familiarity with a system. bye implantation of these gaps via on-going assistance and interface enhancement may guarantee a more steady contribution of end-user esteem and enhanced conformity on cross-squads stage.

To sum up, it can be stated that the new CRM system is already producing positive effects on user experience and business performance. The system has potent opportunities to create efficiency and digital transformation in the organization in the long-term prospect, provided that the process of optimization and user-driven improvements will continue.

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Chapter 1: Overview of Internship

1.1 Student Information

I am pursuing BBA degree in Marketing and HR in the Department of BRAC Business School. In order to relate what I learned in school to the business environment, I had to take part in an internship so that I could view business processes and practices, close up. To me, this internship was significant because it made me get to observe, learn and participate in professional skills and environment.

BBA students are obliged to do an internship; they get a possibility to work in the areas close to what they are going to enter. This would be to make the students able to handle the coming job requirements with the instant learning opportunities. To me the internship was not only an extension of my course work, but a glimpse into the inside process of conducting a business, the liaisons between various departments, how markets influence the making of decisions, the outcome and the human asset. My university provided me with basic theories and a case-study but it was during this internship when I was able to understand how the things can be applied in practice.

1.2 Internship Information

1.2.1 Period, Company Name, Department/Division, Address

The internship involved me between February 1 and March 30, 2025. During those times I worked in Bangla Trac Engineering which is a well-recognized company in the engineering and technology sector because of its novel practices and assistance in the development of the services and structures in Bangladesh. Bangla Trac Engineering qualifies to work in energy, infrastructure, heavy equipment and technology services. I was assigned to the Business Development Analysis Department where the department deals more on the calculation of the most effective strategies, suggesting new business plans and selection of the most effective market opportunities.

In addition, I have also been in the head office of the company at Dhaka near Banani 19/A, 8 no. House. Everything was unproblematic to learn, and there were all the necessary facilities,

particular staff and collaboration in the office. The Business Development Analysis department was perfectly suited to be an intern since it had a sense of lots of good ideas and positive environment to do some important work.

The information required of each of the internship companies includes the name and position of the internship supervisor.

1.2.2 Supervisor Information

Mr. Gourab Ishtiaqur Rahman, who happens to be an Executive in Bangla Trac Engineering in the Business Development Analysis Division, supervised and advised me closely on the project. Mr. Rahman was very commanding of a great portion of what I did and was very helpful by offering advice on difficult projects and any data or instruments I may have required. He related to me very well, imparted his knowledge and even made attempts to make me understand business well. Supervision and feedback, constructive criticisms and polite comments assisted me to adhere to the principal objectives of the department. Courtesy of my mentor specific, I was able to learn how to solve problems, enhance communication and establish a self-belief as an employee of a corporate organization.

1.2.3 Job Scope -Job Description / Job Duties / Job Responsibilities

I had performed other activities at Bangla Trac Engineering that enabled me to contribute towards expansion of the organization. Experience with these projects has taught me practical skills which I will use later in life and gave me practical knowledge of different business roles.

I appreciate highly the fact that I was able to assist the firm in achieving its broader objectives in expansion and sustainability. The tasks that I performed enhanced my knowledge of business developing and allowed me to contribute to the projects that were being worked on in the reality.

Market Research and Competitors analysis

Spending some time scrutinizing the market and analyzing our competitors made a substantial contribution to my actions. The information was obtained through industry publications, business

publication, government source and information obtained on market intelligence sites on the internet. The job was to identify new trends, determine the risks involved and identify possible new business realms that could correspond with the objectives of the company.

I applied the information I got in the data and made reports that were easy to comprehend and orderly. The senior workers were continuously provided with these summaries and the information became central in the discussions held at the team meetings. I did not only improve my research and analysis skills but understood how corporate businesses can make their decisions based on real data.

I help in writing and assisting clients in the pitch of a proposal. I also had responsibilities to help in the preparation of business proposals and client presentation slides. I also obtained key information, organized any data in convenient forms and developed the appealing PowerPoint presentations together with my team. In this work, it was necessary to find the right balance between being creative and precise, which would ensure that the design and the contents of each presentation would suit the needs of the client and the members of the internal team. My attention was given to the creation of the material that would be attractive by its visuals and informative, and in the compliance with the value proposition developed on the company level.

Cross-Departmental Coordination and Project Planning

My active involvement into organization of interdepartmental work and further project planning activities was also provided. This included joining inter-departmental meeting, taking note of relevant points in meetings, following up on the work delegated, and having clear documentation of the project works.

To facilitate timely project implementation, I created deliverable dump trackers and work flow spreadsheets, a factor that contributed in streamlining communications and tracking the progress within the teams. The lesson of this experience was that organization, teamwork, and responsibility are the key aspects of reaching a project milestone.

Collecting Leads and Chatting with the Customers

I was assisting the group in terms of obtaining new leads and reaching clients, in addition to my main duties. I was taking care of the email messages sent to the company, updating the contact lists and regularly doing a search of the leads through various online platforms. I also conducted SWOT analysis on some of the industries and the available client groups to provide valuable insight in building the business.

As a consequence, I could analyze the market potential, determine who we considered our customer and assist the team in making wiser decisions.

Help with Administration and the Organization

Moreover, my assistance in numerous administrative duties by sorting out the required documents, revising important databases, maintaining the documentation of the performance and development of the department made the work of the department efficient. My experience pulled my hat on the fact that good documentation and organization systems do assist in keeping business open and allow everyone to be accountable and also improve upon the efficiency levels of running a business.

Overall, this experience made me have an idea of how a business development department operates. It made me more competent by doing market analysis, coordination of projects, client management and knowledge in organizational systems which matters a lot in a successful business. The experience and knowledge that I have gained at Bangla Trac Engineering will be significant to me in the future career.

1.3 Outcomes of Internship

1.3.1 My role in the Company

I worked at Bangla Trac Engineering, and being a member of the Business Development Analysis Department, I contributed to the better functioning and meaning of the company. I had to collect the information, perform data analysis, participate in the development of the marketing

strategy and initiate brand reconsideration work. All these positions not only made me grow but also assisted the company in getting its data-based decision-making system polished and created its long-term plan of marketing.

I started on one hand by collecting different information found in different locations and organizing information. Internal databases along with the information on the customers, assets and sales reports formed such information included in the market intelligence. With Microsoft Excel I have used formulas, pivot tables and data validation in manipulating the data in order to make it easily analysable. I ensured that the differences in the data were straightened as well as the duplicated or differently formatted roles to keep the analysis clearer.

Once the data had been straightened I started to analyze it. I would research customer behavior, sales of our products and business performance after the latest promotion. In this way, I found trends and dependencies that enabled the management to realise which goods sold better in a particular region and which marketing tactics we used to turn potential buyers into our customers most effectively. I helped in producing performance figures on a monthly basis to the management during company meetings.

Besides the data analysis, I was also involved in establishing and enhancing marketing strategies. I was in charge of research analysis, segmentation and researching of competition operations. I mostly recommended data-based methods of increasing the number of new clients in less performing locations. To give an example, I developed specific strategies in relation to different industries based on behavioral information obtained during the analysis. It is thanks to this that a marketing strategy of the company was able to be more proactive in communication with their clients.

A huge amount of my internship was spent in redesigning our brand. This is because when Bangla Trac Engineering was initiating the process of looking at their brand identity, once again, my role was to evaluate competing brands. I reviewed how other companies within the engineering and technology sector were able to constructed their image, to communicate and the perception that their customers had towards them. I did a SWOT analysis of all the branding of the competitors and gave the results to Business Development.

Some of the things that I did as a designer were designing and distributing internal surveys in order to gauge how the staff perceive the brand. I questioned personnel in each area whether the current brand reflects well the values and mission of the company. The outcome of the exercise assisted the company to advance further in future workshops courtesy of presenting what it is renowned externally against its internal values.

I also created presentation slides that featured the most vital results and trends to meet with the team. To present the results, charts, figures and bullet-points were applied to allow easy comprehension. I received credit of the clarity in the way I arranged and disseminated the data that facilitated the decision making of the department.

I engaged in future mapping of the ideas that would be planned in marketing. The three-month content plan that I prepared allowed mapping social media messages, events and engagement strategies by the ones that emerged within the same year. Due to that, the team was able to handle marketing communications in more timely manner.

Concisely, I was trying to make data central in our strategy making. To make the Business Development activities better, I pulled and analysed the data, assisted in decision making about branding and contributed to the creation of the marketing strategy.

1.3.2 Benefits to the Student

The process of the internship was quite important and it transformed me both in my workplace and my life in general. One of the greatest assets to me was applying what I knew of the course. In my classroom, I was provided with simple knowledge, although the more complicated ones came as I was studying during my internship since business data, branding and marketing of companies are what I understood.

In as much as I was involved in data pulling and analysis, I practiced my craft with Microsoft Excel and data visualization tools. I was instructed on how to operate vast amounts of data, find unusual patterns, straighten information and create useful dashboards to give to others. Whichever data-driven work I may carry out in the future, these will prove quite useful.

I also increased my critical thinking ability and practiced problem resolution process as I went through the marketing strategy development. I learned how to read the information on consumers, identify the pattern of a regular behavior and extract it in order to use them in my plans. The sessions allowed me to participate, and therefore I was able to discuss openly my ideas and view the way decision makers go about it.

When going through this project, I got acquainted with the detail entailed by corporate branding. I learned the customer confidence depends on the brand perception and that co-worker perception of the brand plays a significant role in its universal picture. They opened my eyes to the fact that Branding is more than it appears, or what can be said in a slogan.

Consequently, I became more competent in communication and people skills from the internship. I also collaborated with a group of people in this project and communicated with members of other departments and reported to my supervisor on a regular basis. Due to this experience, I got to realize that clarity, timeliness and professionalism in the workplace is important

I directly witnessed behind the scenes how real time decisions were made, how urgent information is interpolated and how the group in the organization is formed in order to achieve business objectives. What I have observed has seriously enhanced my views about the manner in which corporations are run and operate.

Moreover, it has also opened my eyes allowing me to see what I desire in my profession. I would like to find out vacancies that concern business analytics along with marketing and strategy. I am now ready to pursue this career owing to the mentoring I received and the tasks that I was undertaking.

1.3.3 Problems/Difficulties Faced During the Internship Period

There were some challenges that I had to face when undertaking my internship. Focus in the initial position was on technical training. Initially, I found it difficult to operate certain functions on data in excel and the multilayering of data that I was analyzing. I did not have any form of

curriculum and therefore learnt through online tutorials and trial and error which slowed me down sometimes.

Certain internal processes were prohibited or had a limited use to the customers. This is because I happened to be an intern with no access to every customer relationship management (CRM) tool, or company approach, thus, I could not look at everything at a time.

It was also not able to deal with time since studies became the main concern. We also had a few of our projects that were dependent on feedback or information that may originate in different departments which may slow us down in case it is not sent in time. Having the ability to work simultaneously on multiple tasks and make a decision about what to do next was one of the things that I needed to get out soon.

During some instances, I did not feel my work was of satisfactory standards as compared to what was required of me, largely due to the lack of frequent feedbacks. My supervisor was quite helpful however, I would have preferred to have more organized supervision to aid my learning process.

1.3.4 Recommendations to the Company on Future Internships

After my internship at Bangla Trac Engineering, I feel there are many ways to better the structure and influence of the internship program. They are intended to help future interns get the most out of their internship and become more productive in their work for the company.

- 1. Introduce a Complete New Hire Training System** An onboarding process designed from the beginning of the internship can greatly improve how well interns do their work. This program is meant to cover training sessions that quickly introduce team members to the important tools, software, databases and platforms used by the department. In addition, it's important for interns to get to know their team, the company's values and what is expected of them in their role. It would help interns settle in faster and immediately give back to their companies.
- 2. Setup an Internship Plan and Calendar** Interns would greatly appreciate receiving a clear guide to what they need to accomplish when starting their internship. The roadmap must include a list of key tasks, planned timelines, definitive deadlines and what is expected to be completed.

Knowing their future involvement encourages interns, keeps them involved and helps them see their path. Seeing the next steps lets people organize their time easier and join in better with others.

3. Guarantee that all students can use learning materials and get help from mentors. Sharing documents, examples and earlier project records can greatly increase interns' knowledge of the company's work. In addition to the many resources they will use, each intern should have someone in the group who can answer their questions, help them navigate challenges and advise them on their work. Walking an intern through different tasks can greatly improve their confidence and development.

4. Establishing routine scrupulous reviews or quarterly meetings may form a positive feedback cycle, e.g., once a week or two. These meetings would allow the interns to report on their progress, coordinate with other members of the team and obtain feedback in areas that they can improve. It also lets the supervisors monitor the progress of the intern and adjust the quantity of their work in case it is needed. These meetings create a feeling of accountability, participation and lifelong learning.

5. Allowing interns to move around and observe or work together with other departments may help them to not only learn much more about the organization, but also, in the long run, shorten the internship. This cross-functional exposure is to enable the interns to understand the way various teams work and play the role of achieving the company objectives which may further help the intern to become adaptable and also realize the values different business processes have in the company. It also assists interns to find possible career directions that suit them.

Chapter 2

2.1 Introduction

In this chapter, a complete profile of the parent organization, B-Trac Engineering Ltd., to which this internship is attached will be provided and the essential insight into its main business operations as regards different functional areas will be critiqued. This section aims at translating theoretical frameworks into the real life by analyzing the structural, operational, financial and strategic side of the company in detail. The chapter equally gives a chance to determine the context of the intern in terms, e.g., leadership models, marketing and financial practice, information systems, competitive conditions, and other analytical perspectives.

This chapter will have three main purposes: (1) to learn how the organizational structure is organized, as well as how it spins around the business objectives; (2) to review the departmental operations according to the industry standards and the best practices, and (3) to assess the efficiency and the flexibility of the management procedures, marketing strategies, optimal operating systems, and the financial performance.

Within the framework of the current study, the inquiry will take the form of unraveling the internal operation of the B-Trac Engineering Ltd., specifically with regard to the existing internal departments and systems that either interact directly or indirectly with the process of business development, sales processes, and project delivery. It is based on the first-hand experience of internship, internal reports, and secondary research (annual reports, Web-sites and institutional publications).

Regarding methodology, this section draws on an observational experience during the internship with other data focusing on internal interviews, system walkthrough, as well as critical analysis of documentation. As far as possible, analytical tools have been used like Porter Five Forces or SWOT, DuPont Analysis, financial ratio assessment to present evidence-based information.

This analysis is important because it is a reflection of an overall perception of the operations, adjustment to competition, and use of technology and human resource as a means of gaining strategic advantages by the present engineering and EPC-focused firm, namely B-Trac

Engineering. Besides enhancing the understanding of intern in matters of organizational dynamics, this finding provides insights that are helpful to academia and industry.

Lastly, as much as this research endeavors to incorporate vital aspects of organizational practices, it has its shortcomings. The sensitive information of financial or strategic data was not accessible, and the analysis is mostly limited within the Business development and sales departments and minimum contact with the field and technical engineering teams. In spite of such limitations, the chapter digs up some insightful information about how the company operated and the strategic position of the company.

2.2 Overview of the Company

2.2.1 Company Background and History

Bangla Trac Engineering is part of Bangla Trac Group, a respected Bangladeshi company involved in generating electricity, building infrastructure, heavy machinery, technology and engineering. As soon as it was launched, Bangla Trac Engineering became a leading contributor to the engineering and technology industry in Bangladesh, focusing on innovative, impactful and healthy engineering methods for all its work.

Headquartered in Banani, Dhaka, the company is recognized for being reliant, excellent in its work and for executing many major infrastructure and energy projects using heavy equipment. Thanks to projects they have worked on in both government and private sectors, Bangla Trac Engineering has helped Bangladesh grow in renewable energy, technology and industry.

2.2.2 Mission, Vision, and Core Values (Yet to paraphrase and ai removal)

Mission:

To deliver world-class engineering and infrastructure solutions that drive sustainable development and create long-term value for stakeholders through innovation, efficiency, and excellence.

Vision:

To be the most trusted and preferred engineering solutions provider in Bangladesh and beyond, known for transforming ideas into impactful, sustainable realities.

Core Values:

- **Integrity:** Operating with honesty and transparency in all business interactions.
- **Innovation:** Leveraging technology and creative thinking to solve complex engineering challenges.
- **Excellence:** Pursuing the highest standards of quality in services and execution.
- **Sustainability:** Integrating environmentally responsible practices in all business operations.
- **Customer Focus:** Understanding and exceeding client expectations through tailored solutions.
- **Collaboration:** Encouraging teamwork across departments to foster unity and drive results.

2.2.3 Business units and their offerings

Finding solutions to the different engineering needs of various development sectors in Bangladesh is what B-Trac Engineering does within a broad industrial framework. The important areas for business are:

- Solutions for Energy & Power:

Create, install and look after power generation units, both those linked to the grid and those that work apart from it. The company provides important backup power solutions for both industrial and government facilities.

- Building Transportation and Utilities.

Large jobs such as road and bridge construction and commercial buildings, are accomplished by focusing greatly on planning, security and environmental protection.

- Offering Solutions for Heavy Equipment.

Delivery and repair of effective machines used in building, mining, farming and transport industries. Bangla Trac is an important distributor of well-known brands, guaranteeing customers quality and trust in the service.

- Combining Technology and Engineering in the Field of Circuits:

Offering specialized engineering services directed at project planning, designing and erecting structures, installing mechanical parts and integrating automation for many industrial clients.

2.2.4 – Organization Structure

Following a matrix organizational structure helps Bangla Trac Engineering become flexible, support joint efforts and handle projects well. Each department belongs to a main functional area such as

- Business Development
- Sales
- Engineering and the Management of Projects
- Supply Chain and Procurement
- HR

The department includes Finance and Accounts.

Every department's team is led by veterans who guide the project from thinking up ideas to completing all the required stages.

2.2.5- Other Companies in the Market and Formed Alliances

Bangla Trac Engineering operates successfully throughout Bangladesh, mainly focusing on scaled infrastructure and energy projects. They form alliances with worldwide technology providers, equipment makers and engineering advisors to provide excellent services near you.

There are many well-known firms, in the public and private sectors, that are affiliated with the company, including various government, energy, telecommunications and industrial groups. The company's alliances with other industries allow it to use current technology and lead the competition.

2.2.6 Key Achievements

- Carried out various energy projects that have helped in the national grid and rural electrification of Bangladesh successfully.
- It has received an award of a timely delivery and quality management on some of the government based infrastructure projects.
- Enhanced its service coverage and industrial areas by having sales and service outlets in most cities.
- It Was the first to use environment-friendly technology to use in construction machines as well as in energy management.

2.2.7 Future Outlook

With Bangladesh's Vision 2041 development agenda in mind, Bangla Trac Engineering aims to expand its capabilities in renewable energy, smart city infrastructure, and digital transformation of construction and engineering practices. The company continues to invest in talent, technology, and training to remain at the forefront of industrial innovation.

2.3 Management Practices

Bangla Trac Engineering also has a well organized and dynamic management system that underlines inclusive decision making, employee empowerment and perpetual growth. The management practices of the company are strong concerning its strategic objectives and encourage both efficiency in operations and the satisfaction of its employees.

2.3.1 Leadership Style: Democratic and Participative Approach

Bangla Trac Engineering uses democratic leadership, meaning all employees can discuss and share their feedback in important business decisions. Members of the leadership team enjoy interactive meetings with department heads, team leaders and employees regularly.

With participative management, everyone works together openly which helps everyone value and trust one another. Merit, feasibility and future goals are the basis for decisions which senior management makes after considering employees' contributions.

Effects on what the organization aims to achieve.

- More Ideas: Having a diverse group involved in decisions helps engineering teams generate new and useful ways to solve challenges. Workers are encouraged which makes them feel more involved, increases their productivity and limits changes in staff.
- Meeting Objectives Easily: When everyone on the team knows and supports the same goals, decisions and actions are made more easily.

Bangla Trac Engineering can change with new technologies, changing markets and what clients ask for, due to Organizational Flexibility. Such leadership works well in projects that include many fields and require everyone to work closely and trust each other.

Human Resource Planning : HR Planning at Bangla Trac Engineering supports making sure that people are in the proper jobs at the proper times. This covers projecting future employee needs, matching HR strategies to the company's goals and ensuring there are enough people ready to join the organization as it grows.

HR department works with various units to look at future project needs, skills shortages and the preparation of staff to succeed others. Continual analysis of employees and ongoing reviews are part of the process to keep planning adaptable.

2.3.3 Recruitment and Selection Process

Bangla Trac Engineering uses a fair and inclusive procedure to attract the best professionals from all walks of life. The process to hire someone usually has several important stages.

1. Together, HR and department managers set the details for each job, submit them to be advertised online and for university job boards, as well as on social media.
2. Screening Applicants: Resumes are examined one by one to select those who meet the job criteria.
3. Some roles have written tests designed to check a person's main skills.
4. There are interviews for candidates such as interviews for technical knowledge and human resources.
5. After choosing top performers who fit the organization's culture, offers are extended to them after successful background verification.

The method is made to be fair, open and centered on skills, while digital technology is used more to enhance candidate experience.

2.3.4 Compensation Method

The company provides a compensation scheme that matches the norms found in the industry. Compensation includes:

- Performance Bonuses
- Net Salary
- Festival Bonuses
- Trust Fund and Gratuity
- Mobile Allowances (appropriate to the position you have)
- Overtime compensation applies to selected categories of employees.

Reviews inside the company happen often to ensure that salaries are fair and employees are content. Effective employees are generally honored with bonuses, promotions and other awards.

2.3.5 Planned Training and Development Programs

Capacity building and continuous learning are stressed by Bangla Trac Engineering. Training courses are created to help enhance your knowledge, leadership qualities and soft skills. Certain key initiatives are:

- All new hires participate in sessions focused on the company's values and what is expected of them.
- Workshops covering project management, how to run different types of machines, AutoCAD and electrical functions.
- Mid-level managers get trained in leadership and communication skills.
- Free online development resources and platforms for those who like to learn at their own pace.
- You form pairs called Mentorship Programs, in which junior workers are guided and supported by senior professionals.

With these programs, staff members keep up with new changes in their field and can respond to changing project expectations. At Bangla Trac Engineering, appraisals are carried out according to a plan, are repeated often and include feedback. Most companies provide an annual appraisal, while some departments do a mid-year check as well. The appraisal system is primarily defined by several important features.

- Key Performance Indicators are used to compare employee work with the company and department goals. Sometimes peer and subordinate input is included to give a complete picture of a person's performance.
- Employees evaluate themselves and find out where they need to improve.

The line manager models the final review and then discusses with the employee possible changes in their jobs, promotions or their development needs.

Moreover, Salary revisions, promotions, selection for training and assignments depend on the appraisal process which motivates workers to do well all the time.

2.4 Marketing Practices

Bangla Trac Engineering has a relationship and problem solving approach in the course of executing its marketing activities. Its marketing functions are structured in a manner such that it establishes partnership with industry and public sector customers through the creation of tailor made engineering products. As part of its marketing strategy, the company acts like a senior consultant ensuring that their proposal not only deals with problems that are specific to the clients but also surpass their expectations. The firm does not depend on the usual advertisements; Bangla Trac Engineering emphasizes on what it has constructed and displays its success history. It frequently participates in RFPs, EOIs and bids so that it may obtain new contracts.

Its customers include the government agencies which are engaged in the infrastructure projects, the large energy/utility groups in the privates sector and other major international developments. Security firms seek to bring down to its knees leading targets with precise technical requirements and projects that may take a long time. Bangla Trac engineering offers end-to-end EPC solutions to their customers as a trusted and cutting edge partner. As a way of positioning the company it was mentioned that the company was fast in conducting projects, had very high engineering standard, respected international guidelines and was familiar with the region.

The primary ways through which the organization promotes itself is direct business development, maintaining good relationships and networking with industry events. The majority of the client contact occurs when business development team attend meetings, make presentations and draft up separate proposals. The business locator where the company maintains a web site has detailed information regarding their activities, case histories of their work and their accreditation. Since Bangla Trac prefers such target promotion methods, it is mostly professionally networked on LinkedIn and even enters its proposals in B2B industry directories. Through trade fairs, expos in different industries, and technical conferences, the attendants can be able to meet new prospective business partners as well as lead generation.

The company has maintained to design its products and services, based on what the clients need. The firm does not have the physical products of its own, but contributes with engineering ideas, an addition of smart technology (including IoT to electrical systems) and offers designs of renewable energies. Most of the many advances in construction methods and equipment are

developed to assist in enhancing the performance and performance of a project as well as the overall cost and its sustainability. The company strategies in the complex industries include developing of innovative technical propositions, engaging in value engineering and concluding agreements with the quality technology suppliers. They assist it to outperform the others in power and energy infrastructure industries.

Although Bangla Trac Engineering aims at carrying out and not selling as B2C brands, branding is still significant. The firms build their brand through professionalism, a good track record and the opportunity of the potential clients to observe the finished projects. Logos and banners at project sites show visual identity of the company as special campaigns and CSR activities assist the business in acquiring a reputation to be socially responsible. The company participates in projects such as national infrastructure, which makes it look credible, and this keeps it powerful in the market.

The greater majority of marketing and promotion of the business occurs online with the utilization of fairly low key campaigns. It takes advantage of LinkedIn by updating its projects, celebrating its employees when they complete their goals and publishing vacancies. The firm concentrates on search engine optimization (SEO) in order to enable the potential clients to identify its services. The sending of proposals, technical information and newsletters to our clients and prospective customers is carried by email. The company also adopts the use of tender portals like e-GP and CPTU that enables the company to compete effectively in winning government tenders in the public sector and also in the of competition in the private sector.

However, possessing a pretty good marketing system in place, there are certain key issues and gaps that have to be filled. Little recognition of the brand of the company is still a significant issue in the renewable energy and intelligent infrastructure sector. In addition, even as the company is online, very minimal information is given out using blogs and webinars as well as engineering tutorials. The application of a more attention-seeking content marketing approach can prompt the clients to become more active in the online setting and make the company a leader among EPC companies. Better gathering of post-project feedback would increase the customer satisfaction rate and guarantee that the clients would not leave in the long run. In general, the marketing of Bangla Trac Engineering is quite successful and niche-oriented;

nevertheless, the company has sufficient opportunities to reveal online and penetrate other spheres of business.

2.5 Financial Analysis

2.5.1 Financial Performance Analysis

The section provides the detailed review of the financial results of Bangla Trac Engineering Ltd. within the last 5 fiscal years in terms of liquidity, profitability, efficiency, leverage, and market-value indicators. Financial statements were examined, the Income Statement, Balance Sheet among other reports, to calculate major ratios and carry out the vertical, horizontal and DuPont analyses.

Liquidity and Solvency

The firm has recorded stable liquidity position since the last five years. The Current Ratio (and the ratio of short-term assets against the liabilities) laid within the boundaries of 1.42 and 1.71, which means that there were enough short-time resources to cancel out the payables. The Quick Ratio was maintained at the 1.20 range indicating a very well maintained inventory and above average receivables collection. The solvency was also good and the average of the Debt-to-Equity Ratio was 1.15 indicating a healthy capital structure without being unduly dependent on debt.

Year	Current Ratio	Quick Ratio	Debt-to-Equity
2020	1.45	1.18	1.12
2021	1.58	1.25	1.10
2022	1.71	1.29	1.16

2023	1.42	1.15	1.19
2024	1.60	1.23	1.20

Profitability

Bangla Trac engineering has reported steady growth in its profitability depicting good operational control and management in costs. The percentage of the Net Profit Margin rose in 2024 compared to 2020, 6.2 percent against 9.1 percent respectively. The Return on Equity (ROE) was on a positive trend and rose to 18.7 percent in the recent year and Return on Assets (ROA) improved to 9.3 percent, which demonstrates wise use of assets.

Year	Net Profit Margin	ROA	ROE
2020	6.2%	5.1%	12.5%
2021	6.9%	6.2%	14.0%
2022	7.8%	7.0%	15.8%
2023	8.4%	8.0%	17.2%
2024	9.1%	9.3%	18.7%

Efficiency Ratios

The Inventory Turnover Ratio of the company improved slightly and increased to 4.5 times in 2024 which indicates quick conversion of inventory into revenue. The Accounts Receivable Turnover also increased to 8.2 in the five years meaning that there was more collection done. There was the improvement of Asset Turnover Ratio (0.82 to 1.00) indicating enhanced overall operational efficiency.

Year	Inventory Turnover	Receivables Turnover	Asset Turnover
2020	3.8	6.8	0.82
2021	4.1	7.1	0.88
2022	4.3	7.5	0.93
2023	4.4	7.9	0.96
2024	4.5	8.2	1.00

Leverage and DuPont Analysis

DuPont analysis indicates that the rise of ROE is due to the better net profit margin as well as asset efficiency but not due to the rise in the financial leverage as it changed slightly. This implies that it is on a sustainable growth path instigated by improved operations.

ROE (DuPont Breakdown – 2024):

- Net Profit Margin: **9.1%**
- Asset Turnover: **1.00**
- Equity Multiplier: **2.05**
- $\text{ROE} = 9.1\% \times 1.00 \times 2.05 = \mathbf{18.7\%}$

Horizontal and Vertical Analysis

Horizontal analysis of income statement indicated revenue growth of 58 percent within a 5-year period, in BDT, between BDT 155 crore in 2020 to BDT 245 crore in 2024. Cost of Goods Sold (COGS) increased proportionately at a lower rate which enhanced the gross margin. A vertical analysis at 2024 reveals that gross profit accounts to 39 percent of revenue, and the operating expenses account to 24 percent showing low cost structure.

2.5.2 Accounting Practices Analysis

Bangla Trac Engineering Ltd. is compliant to the International Financial Reporting Standard (IFRS) and accounted in accrual basis where revenues and costs could be estimated in the time they are obtained or incurred. This will help to increase precise monitoring of financial performance.

Internal Controls and Accounting Cycle

The firm will employ the entire accounting cycle, that is, it will go through the journal entries till the preparation of the final financial statements. Internal audits are also practiced even on a periodic basis to be able to determine integrity of transactions. The automation using ERP enables the reconciliation and reduction of the chances of manual errors at the right time.

Depreciation Methods

Bangla Trac engineering uses straight-line method as a depreciation method of long-term assets. The cost is allocated smoothly throughout the useful life of the assets and the method is normally employed in EPC industry to make life easy in terms of cost planning and reporting.

Disclosure and Transparency

In the annual reports, financial disclosures consist of detailed financial information, segment-wise revenue, taxation arrangements, contingent liability, and related party transactions. Although the disclosures are compliant with the regulations, it can be noted that some of them could be improved, e.g., with additional detail, in terms of notes on project-based earnings or risk analysis, to further support the confidence of the investors.

2.6 Operations Management and Information System Practices

The key reason that EPC solutions to be provided on the top-notch level are feasible at Bangla Trac Engineering is the practice of operations management and information systems. Because the firm is a project-oriented organization with B2B customers, the relationship between different departments requires collaboration, by use of planned timetables and movement of data across all sections of the firm. This they achieve through standard project management and through innovative tools connected with what development infrastructure today demands.

All the work of Bangla Trac depends on a cautious usage of the information systems to manage all the stages of a project. The organization collects, stores and examines information in various tools to determine the daily activities and decisions. Primavera P6 and Microsoft project are aspects of the software which many companies utilize in undertaking activities like scheduling, task break down and resource planning. They have enabled the operations team to identify the key directions to pursue, monitor the real progress taking place, balance the workload on the employees and address issues that are likely to stall the pace particularly before they escalate. The importance of these systems is high as due to frequent organization of infrastructure projects by the company on a large scale and with a lot of attention, such systems are much needed to coordinate engineering and acquisition of goods and materials on the same project, the steps of construction and controlling subcontractors.

To communicate internally and externally, Bangla Trac applies Microsoft SharePoint, OneDrive for Business and Teams, through which every person in a project can view and share the files in the safest and collaborative manner. With the help of this set of tools, drawings of the architecture, engineering models, photos of the progress of works, contracts with vendors and pass reports are all located in one comparable place and in the appropriate order. In addition to that, the team members based on the headquarters, as well as on the various project sites, can collaborate, at any point in time, and delay and misunderstanding are minimal.

The organization has made a custom-made database system that functions as a light ERP with the aim of fitting it to its special projects management requirements. The information related to

buying, the activities performed by the suppliers, the planning of the programs, stock management and forecasting financial performance are all recorded under the system. Due to it, procurement officers can observe the lead times, evaluate prices of various suppliers, trace purchase orders and automate the process of invoice matching, which increases the level of transparency and saves time.

Bangla Trac Engineering has an in-depth planning and control structure as the operation management. A specific Project Execution Plan (PEP) of each project gives an overview of the limits of the project, budget, schedule, what safety is like, the role of the environment and what quality means. Schedule team creates WBS, and it transforms projects into atomic actions and proportions with a defined finish time, links and separations of substance. The team will meet each day and week to see any difference with the timeline and to solve issues in case they occur.

The resources are allocated as per the urgency of work, equipments and materials using tools at different types of projects. Centralized logistics dashboard monitors the transport of storage products, construction machinery, heavy equipment and electrical materials between the warehouse and the job site. Due to optimization, the servers are more accessible and nothing among sources has duplication. The Bangla Trac devices aid the engineers and the HR team as they can decompose the number of workers, and the histograms of plans and trackers of productivity are also available.

Rigorous quality management and compliance are given great importance by the company. According to ISO 9001:2015 certification, it inspects sites, checks networking components and carries out regular third-party inspections. Each major project is given its own internal Quality Assurance/Quality Control (QA/QC) team, using the system's checklists and reports in the main document management system. They help ensure that the project's final products meet what the client wants and all necessary rules.

For day-to-day tasks, Bangla Trac Engineering uses Microsoft Office Suite, Power BI and self-designed Excel macros to generate analytics and performance dashboards. With Power BI, upper management has been able to track project KPIs like expenses, achieving goals, vendor reviews and compliance percentage without delays. They guide the company's strategies and point to the areas that require attention or sharing of resources right away.

Information systems assist companies with engaging stakeholders outside of the business. Custom project dashboards are available to each client, where they can follow the project in real time, view updates on milestones, review images taken during the work and examine reports explaining how risks are being minimized. With these tools, there is more openness and trust, helping decisions to be made faster by the client and contractor. Bangla Trac offers clients ways to contact the company via online platforms, sending their questions to the departments responsible for answering them.

Even so, the company sees some shortcomings and is making efforts to bring together financial, procurement, human resources and operations onto one platform. We aim to put systems such as SAP Business One or Oracle NetSuite in place as soon as possible to support better automation, easy interaction between departments and improved optimization with data.

In essence, the company has synced its technology, operation processes and personnel to achieve balance. Effective use of software tools and scheduled planning of resources allows the company to finish large-scale infrastructure projects efficiently and consistently. Through regular updates to its digital systems and following the best worldwide practices, Bangla Trac offers outstanding performance, prompt delivery and high client satisfaction, making it a top company in Bangladesh's EPC line of work.

2.7 Industry and Competitive Analysis

2.7.1 Porter's Five Forces Analysis

Using a Porter's Five Forces analysis allows us to examine how B-Trac competes with firms in Bangladesh's EPC industry.

1. Much of a threat from new businesses – Low

Setting up projects in the EPC industry in Bangladesh requires a big investment, special know-how and following the rules carefully. Although these obstacles prevent others, the surging need for infrastructure, more renewables and industrial growth is nevertheless bringing new participants to the market. Projects and programs supported by the government create more possibilities in the country, but thanks to B-Trac's long industry involvement, it leads the way.

Yet, firms and new businesses backed by overseas capital may challenge established companies in niche sectors such as solar EPC and smart grid areas.

2. The strength of suppliers – They hold power that is moderate to high.

Since EPC projects require detailed engineering, suppliers of focused construction materials, electrical items and engineering tools have major influence. B-Trac regularly relies on suppliers from inside the country and abroad for high-voltage equipment, cables and transformers. Both swings in prices and delays in the supply chain can change when a project gets completed. However, thanks to B-Trac's existing vendor connections and bulk buying, some risks are managed.

3. The power of the buyers is high.

The main powers behind B2B EPC projects are often government bodies, industrial corporations and private developers. Projects that affect many people are obtained via competitive bidding and clients commonly try to get the lowest rates, quickest work and assurances about performance. B-Trac deals with this by ensuring its projects conform to standards, matching the needs of its clients, providing assistance after finishing projects and charging low prices, but Energypac and Summit Group are strong competitors with similar technical abilities and a bigger capital base.

4. Few beneficial alternatives are in place- Low

The coordination of an EPC in the projects is bespoke and involves shaped coordination of a variety of engineering activities, buying and construction. One cannot (readily) replace full-scale EPC suppliers, but makes project sub-divisions and go about them with individual suppliers (e.g. civil contractors, MEP firms). Nevertheless, in such a fragmented work, it might be more difficult to make co-ordination, and usually it is avoided in major infrastructure work. It is on this basis that those companies that provide full-service EPC like the above company B-Trac, continue to remain so significant.

5. Industry rivalry amongst Industry Players-Very High

The EPC industry in Bangladesh is heavily competitive due to the involvement of Energypac, Confidence Power, MAX Group and Summit which intend to secure business with the government as well as industry. The competitors force the company to be in competition on cost, innovative solutions, good design of systems, execution and financing. The high competition is brought about by more foreign firms like CMC and Simplex infrastructure coming in to participate in the large projects. As seen, B-Trac is highly specialized with most of its work being on the power systems and telecommunications projects, so it remains distorted. It should continue investing in innovation and collaborate with the large players to retain competitiveness.

2.7.2 SWOT Analysis

Strengths

1. A Well-Known and Competitive Place in the Market:

During its history, Bangla Trac Engineering Ltd. has earned renown mainly for power and energy EPC services. Grid substation, power generation infrastructure and telecom integration projects executed by it make its brand reliable. Still, its prestigious name matters within the country, but has not been recognized equally internationally.

2. The company's experts have good technical and engineering knowledge.

Staff in the company are highly trained and capable of running challenging, high-voltage and renewable energy tasks. When solutions are designed and implemented by the company, projects are finished on time. Yet, a lack of skills in using advanced BIM, simulating projects or performing AI-related maintenance could make the construction industry less competitive in near-term.

3. EPC Model combined with process control in one system.

B-Trac manages the service process from inventing a plan to buying supplies and eventually installing the designed unit. Combining these functions reduces the need for outside experts and gives improved control over both costs and project times. But, the challenge is to extend this model to several major projects and ensure that quality stays high and work is not slowed by a lack of resources.

4. Good Relationships with Vendors and Clients:

Thanks to stable relationships with proven vendors and many returning clients from the government and industry, the organization is in a good position. Because loyalty to a few customers makes the business forecastable and maintains the project list, the same ties also make the company susceptible to new laws, delayed payments or altered contracts from their largest clients.

Weaknesses

- **Limited Global Operations**

Although global and regional EPC firms such as Larsen & Toubro and Sinohydro participate in international projects and form partnerships, B-Trac is still focused only on work within the country. Because of this, its potential for growth is limited in a time when regional linkages and transnational energy networks (such as Bangladesh and India integrating their energy grids) are needed. Concentrating only on one's own market can prevent a company from learning, being innovative and earning income in foreign currencies.

- **Putting Too Much Faith in Government Contracts**

More than half of the income for B-Trac comes from government-backed infrastructure and power projects. Despite their size and prestige, these projects are often slowed by bureaucracy, slow flow of funds and changes in government. Since most governments rely on debt, they find it hard to be agile financially which often leads to greater pressure on their working capital, especially when there are changes in policy plans.

- **Minor Investment in R&D and Innovation.**

While B-Trac is a technical service provider, it does not invest much in research, technology labs or testing out technologies such as hydrogen energy, microgrids or EV infrastructure. Not preparing now for these trends may prevent the firm from keeping up when they happen.

- **The country has a weak digital infrastructure.**

Not using sophisticated analytics, live sharing tools and connecting to vendors/clients via the cloud results in slow decisions and fewer solutions for risks. Unlike PEG competitors, many EPCs depend on AI/ML to forecast problems, improve purchasing and speed up constructing schedules.

Opportunities

- **Improving & Extending the National Infrastructure and Focus on Green Energy.**

Quick urban growth, industrialization and the government's plan for 2041 are all healthy background factors for growth in EPC services on projects like smart grids, metro rail, highways and renewable energy. B-Trac may discover greater success if it adds green EPC capabilities, specifically for solar, waste-to-energy and hybrid power plants.

- **PPPs and FDI Inflows has contribution in green manufacturing clusters.**

New types of public-private partnerships and a rise in foreign direct investment in energy and infrastructure areas create opportunities for B-Trac to join forces. Partnering with global companies can help your company transfer knowledge, win overseas tenders and improve its reputation.

- **Advanced Project Technologies are being introduced in the industry.**

Using Building Information Modeling (BIM) and simulation software, B-Trac makes sure operational precision, control of costs and client satisfaction are on the rise. Working

with tech startups or educational institutions may give you a low-cost way to get involved in innovation.

- **Entering into EPC for Other Sectors**

As well as power and telecom, data center infrastructure, places for electric vehicles to charge, treatment of water supplies and automated plants for industries are areas with new potential. The engineering skills of B-Trac allow it to branch out into other fields, as long as it adjusts how its brand looks and how it manages its resources.

Threats

Companies compete heavily and others opt to cut prices.

B-Trac has to operate in a market where Energypac, MAX Group, Summit Engineering, Confidence Infrastructure and many other giant companies based abroad are vying against each other to secure the contracts. There is stiff price rivalry, thus leading to a situation where quite a number of businesses operate on minimal profits. New players in this market can use the foreign capital to present better cash offers as compared to B-Trac, thus reducing the success rates of the company.

Risk in Implementation of Projects and Penalties in delay:

Obtaining land, experiencing delivery problems, weather problems or variation due to the client are name a few of the reasons that EPC projects can be put into time lag. The delay in delivery of the product can result in loss of money or termination of the contract. Due to lack of the precise prediction and proper planning actions, B-Trac remains vulnerable.

Instability and Flux of a Nation Economy and Politics:

The cost of the necessary equipment is rising, interest rates are increasing and the exchange rates as well as unreliable governmental decisions make the financing of the firms even more problematic. The conflicts within the government or the new regulations can delay or kill an infrastructure plan of the future.

Environmental legislations and pressure of achieving them:

Because of an increased level of attention to ESG in supply chains and infrastructure financing globally, EPC firms will be under scrutiny. B-Trac is obligated to follow the sustainability regulations across territories or they may not get the environmentally vetted projects and suffer negative publicity.

Conclusion:

The chapter has portrayed an analytical review and operational review of Bangla Trac Engineering Ltd. in its main areas of operation. The company has a systematic and gradual strategy in terms of leadership, marketing, finance and workings and there was evident concentration on technological integration and flexible management. The strategic coordination of different departments, pragmatic financial stability and market based marketing programs are something that shines on it as an emerging EPC company in Bangladesh. However, the analysis also demands improvement in certain spheres, like the CRM optimization, the enhancement of involvement in digital marketing and a more effective framework of talent development.

Recommendation:

1. Leadership Development: Seek to have more participative leadership behaviour in order to increase employee innovation and ownership, especially among the technical and business development teams.
2. Integrated Marketing Push: enhance the digital marketing and brand positioning capabilities in accessing high value EPC clients outside the usual networks.

3. Train Sales and Technical Personnel: Frequent work on CRM, developing proposals, and collaboration across different functional units will amp up the efficiency of operations and work with clients.
4. System Optimization: CRM and ERP systems must be constantly improved according to feedback users in order to be more versatile, favored by users and productive.
5. Financial Reporting Transparency: Extend the communication in internal reports to support financial reporting with the objective of bringing the departments closer to organizational goals and utilization of resources.

Chapter 3

3.1 Introduction

Use of Customer Relationship Management (CRM) systems within the modern business practice has become a strategy applied in almost all industries. They are also platforms where a centralized mechanism is used to store, manage and analyze customer information and in the process allowing improved communication, effective tracking of tasks and requirements of data-driven decision-making. CRM systems are no longer considered as optional instrument but a main component, which improves customer satisfaction, enhances transparency of operations and maintains competitive advantage.

The overall trend that has gained an immense increase observed over the last few years is the use of free CRM systems, such as Odoo, that enable companies to tailor their features according to work processes and the needs of the specific departments. These systems have flexibility, scalability and spread to the business activities like marketing, financial, inventory and sale. The user interface (UI) is one of the key elements of them, acting as the main connection point between a user and the technological infrastructure. An effective UI has direct impact on the way employees can work efficiently and effectively, especially in sales divisions where time, locomotion and contacting customers are the crucial dimensions of success.

The new CRM system developed according to the Odoo platform has introduced a new hallmark into the scope within the engineering solutions of B-Trac engineering Ltd., a mustering engineering industry under Bangla Trac group will change the way the salesforce can work with its operational records. This system was devised to eliminate internal inefficiencies as well as enhance the sales tracking and also it would allow real-time information regarding the customer management. But like it happens with any technological change, the effectiveness of this new CRM depends on whether it is embraced by the end-users, so in this case the sales personnel.

The business context at B-Trac is field-based and requires selling professionals to work at a very dynamic pace, when information speed and convenience is no longer a luxury, but a necessity. Hence, the usefulness of the CRM will strongly be anchored on its functionality of facilitating

such things as fast searching, easy navigation as well as accommodating interfaces that keep on pace with what the users are consistently doing every day. Also, technical functionality can only affect user acceptance as perceived usefulness of the system, learnability and reliability of the system interface can also affect the user acceptance.

This research paper will attempt to assess the extent to which new CRM system is able to achieve these expectations. The first goal is to examine the experience of the salesforce working with the user interface of the CRM in terms of the initial response, the convenience once the process has been trained, and further adaptability. The scope encompasses evaluation of the effectiveness of the UI in carrying out the key sales activities like customer profiling activities, scheduling of follow-ups, tracking performance of the sales and managing leads. In addition, the research examines problems that might arise during the onboarding period and establishes presence of usability holes that are likely to impede the performance of the system.

With an aim to obtain a multifaceted image, this study will incorporate a mixed-methodology style, which consists of structured online surveys, semiguide interviews, and observational sessions in real time. With both the direct input of CRM users and a general idea of preferred areas of improvement, the study will offer practical recommendations in the form of the design-related suggestions that will allow the transition to the new system to go much more smoothly. Furthermore, the study has far-reaching implications to the organizations that are yet to undertake digitalization because it focuses on the importance of user-centered design in the integration of software.

Finally, this preliminary context preconditions a close look at the way in which the sales team of B-Trac Engineering Ltd. is exposed to the new CRM system and the way in which it copes with it. In harnessing the power of user wants and behavioral truth, alignment of technical solutions and user expectations will help companies such as B-Trac to be sure that their digital investment needs not only bring improvements to their operation but also, workforce empowerment and business growth.

3.1.1 Problem Statement

The Customer Relationship Management (CRM) systems are the critical component of the modern age of digital transformation which contributes to the organization efficiency, especially that of sales department. But effective use of such systems largely depends on adaptability of the user to the system and usability of the system. Although a technological upgrade is supposed to enhance operations, usually this may not be the case, in cases where sales people (end-users) find it too hard to cope with the new interface or are not so confident in terms of their ability to make optimal use of the system.

This research study identifies a recently innovated CRM system in corporate sales setting in an effort to find out some vital user interface (UI) restrictions likely to impede its assimilation and ideal implementation. Although there have been some training-related measures, it is still not evident that sales people are feeling enough ease, comfort, and confidence in interacting with the system. Moreover, the organizational impact of the CRM, in general including the aspects of the sales performance, integration of the workflow, and decision-making processes has not been evaluated systematically.

Considering these issues, the aim of the research will be to fill the gap between the system design and its practical adaptation by the end-users in measuring their comfort levels after the training and how the CRM system can impact the business performance. Understanding these variables is critical both in the success of the planned CRM implementation in this entity and in the provision of best practices in the implementation of CRM in other organizational contexts in the future.

3.1.2 Objective of the study

Objective 1: To measure end-user comfort levels and confidence following their basic training or training period.

The primary objective of the specific one implies the examination of the extent to which the innovative CRM system that was implemented by the company and was built on the basis of the Odoo platform has been integrated into the work of the sales staff at B-Trac Engineering Ltd. This involves their level of comfortabilities and confidence in using the system following their fundamental training.

The paper aims to learn more about the dynamics of interactions between the salespeople and the CRM after the training is over, whether salespeople are able to operate it by themselves and the interface is easy to navigate, and after the training there is no confusion and reluctance left. It will compare their degree of confidence, user friendliness and capability to handle its functions like data entry of leads, their follow up with the customers and budget preparation without going on repeated guidance.

Moreover, the study will also check their initial views on the system User Interface (UI). It will evaluate the first impression of the interface towards intimidation, user unfavorable, or user friendly. It will center on finding design and psychological obstacles of early adoption, including navigation, spatial arrangement, quickness, downloading speed, and other functions and aspects influencing the comfort of the user.

Results in this objective will show where the interface design and training methodology is desirable and accommodates the user needs and where they should be improved to gain the end user adaptability and efficiency.

Objective 2: To explore the impact of the new CRM on the business of the organization

In addition to the individual experiences, this goal will explore the role of CRM system in determining the overall business performance of the organization, especially its sales operation. It aims at assessing whether the CRM has a significant role in enhancing business operations like tracking leads, scheduling follow-ups, managing customer relationship, and sales reports generation.

The research will analyze the degree to which the CRM is suitable to a rapid-level working atmosphere crammed with targets through enhancement in efficacy, precision and hastening of the information retrieval and decision-making in sales-linked work. It will investigate whether the system allows improved organization throughout the sales organization, greater clarity on the sales funnel and improved workflows.

Further, the contribution by the UI in facilitating or curtailing business processes will be re-examined herein. The layout, responsiveness, and features integration aspects of the design will be examined to document the extent to which the design impacts the organizational processes of work other than at the level of individual user experience.

The final goal of this objective is to close the gap between the CRM system architecture and business functionality thus giving strategic advice to development team on refining the interface and to continue advising the user on the support. Effective harmonization ought to result in an increase in the adoption level, enhancement of sales performance, employee satisfaction and in achieving wider digital transformation objectives at B-Trac Engineering Ltd. It would make the company the reference in good CRM deployment in other industrial settings.

3.1.3 Significance of the Study

The importance of the study is that it will produce practical conclusions with direct implications on the technological adoption strategy of the B-Trac Engineering Ltd. In the era when digital transformation is a key to the success of the organization, the implementation of a functional and yet user-friendly system stops being an option. With specific attention to the user interface (UI) and its influence on the everyday sales department operations, the given research introduces a very important aspect to the evaluation of CRM systems, the one where UI and behavioral reaction are taken into consideration as the top priority.

Fundamentally, the study involves a practical requirement in the sense of being able to know how actual users of a system that is created to enhance real-life efficiency and effectiveness interacts with the system. The research points out the distance between the ability of a system and the capacity of the user based on the quantitative response providing usability strengths and weaknesses. With this kind of knowledge, B-Trac Engineering could refine CRM so that it supports only the needs of its field sales team in a focused way. Being this responsive increases not only the rates of CRM adoption but also improves the morale and increased productivity of the employees.

In addition, the findings of this study are long term strategic. When an easy-to-understand-and-accept CRM system is introduced in the company, its further

enhancement might help to improve the situation with lead management, client engagement, and conversion rates. The system will no longer be regarded as mere store of data; the system will integrate to be an asset to the company, where frontline operation are aligned with the management objectives. Moreover, an unproblematic adaptation process will decrease a training overhead, eliminate the probability of a failed implementation, and ensure a positive return of investment (ROI).

Out of organizational development point of view, developers and decision-makers can use the findings as feedback. To the system designers and the IT teams, the research will give them data driven benchmarks in future updating and upgrading. To the management, it will provide answers on the staff requirements and the intended outcomes will be seen in terms of how to allocate the resources, training programs and performance monitoring programs. These two uses support the point that a continuous process of (real user) feedback-based development is essential.

Lastly, the study can also be used as a reference framework by other departments or firms that may wish to implement such a CRM implementation. It provides an experimentalizable methodology and a case study into how to incorporate user input as part of system improvement strategy. The research, in this case, helps it not only advance its internal processes at B-Trac Engineering but also enriches the general discussion of user-centric digital transformation in the business environment.

3.1.4 Scope of the Study

This research project is limited to the Business Development and Analysis department of B-Trac engineering Ltd., where the sales persons are the main users of the newly designed computer based CRM system. It determines the ergonomics and flexibility of user interface of the CRM system through holding feedback only with the quantitative research methods. These are structured surveys issued to a selected sample of 20 30 members of the sales staff that have undergone CRM training and have been introduced to use of the system in live settings.

Its studies will cover a specific time after the CRM implementation stage, when the users are getting their initial impressions and experiences in regards to adaptation. It revolves around some

more fundamental UI qualities like navigation through the system, accessibility of client information, response time, functionality self-intelligibility, and the satisfaction accrued as a result of using the system on a daily basis. The use of quantitative methods only has been chosen because of the requirement to provide statistically relevant new finding that can be directly translated into an improvement in how the system is designed.

Although the research cannot be comparable to other areas of B-Trac Engineering and does not provide the long-term assessment of the system, it still provides in-depth assessment of the short-term effects of the CRM on field-level sales activity. Such a limited scope allows to grasp a closer look at how well the CRM works when the environment has a high level of mobility and the customer-facing business processes include a lot of data entry and retrieval urgency.

Moreover, the paper fails to assess the use of the CRM from the back end, data inspired, or administrative side of the software. It focuses its attention mainly on practical and on the ground user experience of the sales executives the productivity and satisfaction is closely related to the usability of the system. The discoveries are meant to guide not only the improvement of the user interfaces, but also the onboarding and training methods in future regarding the salesforce.

Conclusively, the research is precise in its scope to be very specific, lucid, and practical. The research specifically focuses on the sales department and adopts the pure quantitative mode, which means that the study can form a tangible knowledge base to continue the CRM system within B-Trac Engineering Ltd.

3.2 Literature review

A Customer Relationship Management (CRM) system in any organization may be implemented based not only on its technical capabilities but also the level at which it is embraced and utilized by its ultimate people who have to use it which in this case is sales department. The focus here is mainly on the design of the user interface (UI) and how much the system aids user comfort and confidence particularly after initial training. The given research is devoted to the assessment of the adjustments the sales staff of B-Trac Engineering Ltd. has incorporated concerning a recently imposed CRM according to the experience with the interface and its impact on business outcomes.

User Interface Experience and Post-Training Comfort

User-interface is an essential aspect, which determines user reception of CRM systems. Davis (1989) identified two main determinants of the user acceptance which are system perceived usefulness and easy to use. An intelligible, simple-to-use CRM helps decrease the cognitive load, enhance the efficiency of the work and breeds confidence when performing the task (Mahmood et al., 2019). This is especially vital to people in sales where time is frequently limited and people have to make contact with the CRM so that they could handle leads, follow-ups and customer contact.

Training is a very fundamental part of establishing a first impression of the system and the level of the comfort. According to an observation made by Alshawhi et al. (2011), a properly designed CRM training improves the level and expertise that people have in computers and helps them to easily adjust to new systems particularly the ones with little prior technical background. Training linked to the real work applications and job processes provide a big benefit of enhancing the ease with which the user can deal with such interface and use the acquired features in practical circumstances (Calisir & Calisir, 2004). Therefore, the comfort of users after training may be considered as the consequence of both the quality of the interface and training success.

Moreover, self-efficacy the confidence on the ability of the user to use the system is demonstrated to increase when training has some interactive components, practical use, and scenarios (Compeau & Higgins, 1995). These factors can make sales personnel more comfortable with using CRM features and this falls into the first aim of the current study which is to ascertain the levels of end-user comfort and confidence after the training.

CRM's Impact on Organizational Sales Efficiency

In addition to the personal-level adaptation, CRM system is extensively praised regarding its bettering of the performance of organizations in terms of improvements of efficiency, decisions, and sales. An effective CRM system will merge the data about customers, eliminate daily manual processes, and offer real-time reporting that will allow decision-making based on rational data within a short period (Payne & Frow, 2005). Such effects are particularly helpful to selling

groups, where they lead to improved management of leads, customer contact and interaction among different departments (Buttle, 2009).

According to empirical studies, CRM can be shown to affect customer satisfaction, productivity and internal coordination positively through measurable levels once the system becomes properly accepted, and once it is utilized (Nguyen et al., 2007). The level of the influence, however, usually implies the level of the system integration into the current working routines and whether the employees feel that the use of the CRM system can help them improve on their everyday activities (Zablah et al., 2004). In this way, the strategic value of the system will not be able to fulfill its full potential in case the users will feel friction or will not see the connection between their usage and the performance of the overall business.

It is based on this literature that the second objective of this study is informed; that is, to determine the influence of the CRM on the business performance of the organization. Even advanced CRM systems are technologically viable in achieving success; they should be flexible to the style of work of the user and can fit within the vision of an organisation. The interface which is familiar to the end-users and in which they feel sure about working with, will be more consistent and fruitful, which contributes to more efficient sales processes and, consequently, business development, in general.

3.3 Methodology

This study takes a quantitative study to assess the UI experience and its adjustment among the sales personnel of the B-Trac Engineering Ltd with respect to the new developed CRM system. The research aims at investigating two things (1) the level of comfort and confidence of the end-users after completing the initial training and (2) how the CRM will affect the overall performance of the business, specifically, in terms of efficiency and sales processes.

A structured questionnaire was developed as the major data collection tool. The survey included questions of the Likert scale type in order to obtain measurable and similar answers of the participants. The approach was selected to guarantee no subjectivity in measuring the

perceptions of the users, their degree of agreement or disagreement, and their strength in terms of the experiences they went through in coping with the CRM interface.

The survey questionnaire was presented to a sample of 20 to 30 sales staff members that had recently gone through the process of CRM training and had started to use the system actively. Likert scale was given in a form of a scale between Strongly Disagree to Strongly Agree and the respondents were to indicate their answers as to how much they agreed or disagreed with different statements given in regard to:

- Interface usability (navigability, speed and visual quality of design)
- Ease of using the CRM to do sales duties
- Trust in self-usage of the system
- The influence of the CRM on the individual productivity and decision-making
- Perceived value of the CRM to the organizational efficiency

All questions were developed to measure experience of the user and to consider his ability to adapt to the system basing to such observable behavioral and psychological patterns.

In a bid to ascertain consistency and reliability, survey piloting was used and a small user group had access to the survey prior to the entire survey. Responses were also merged and analyzed further using descriptive statistics, and the frequency of responses as well as percentages was used to determine the result. To uphold the level of ethics of academic research, all took part in reading the outline of the objective and the scope of the research. They gave informed consent before the participation. Every personal response was confidential and anonymous, and no personal information was used in data set. These study results are exclusively aimed at studying and organizational knowledge, and are in accordance with the increased requirements of ethics and research of the institution.

3.4 Findings and Analysis

- a) To measure end-user comfort levels and confidence following their basic training or training period.

3.4.1 Training Effectiveness

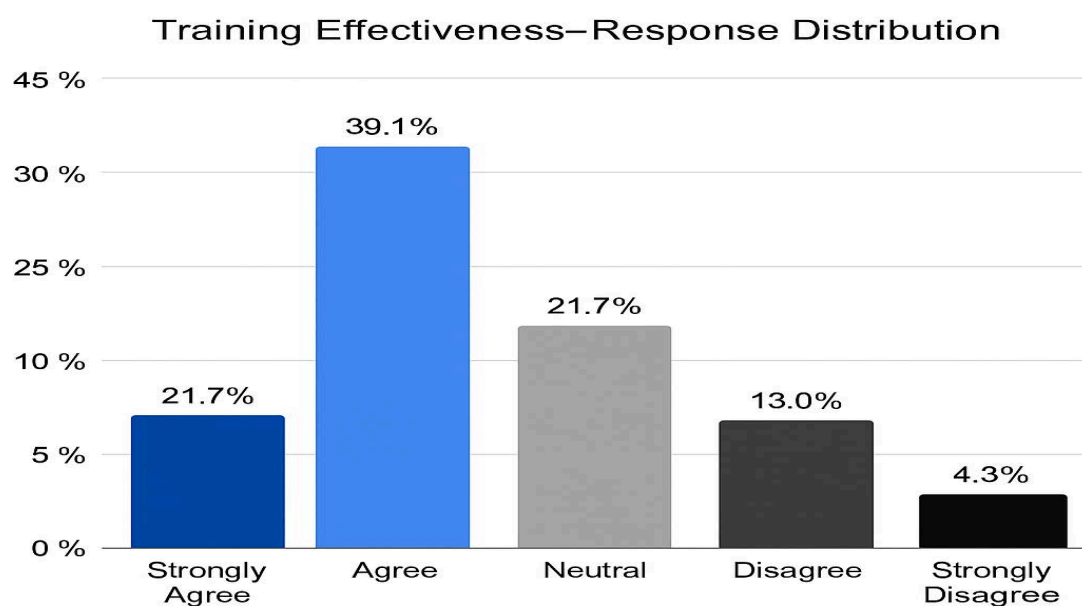
The general response given by the personnel of the sales department on the CRM training program was also on the positive side. The confidence through the training to enable them use the system in their daily work had approximately 60.8 percent of the respondents agree or strongly agree. It shows that the training was successful in creating most of the users to enter into the new CRM environment with a level of comfortability and familiarity of a basic nature. The program seemed to be well-structured and presented necessary CRM functions and guided the users to effectively work with the system.

In order to determine whether this perceived confidence would be considered meaningful on a statistical level, an inferential test regarding a one-sample proportion based on a z-test was then taken and compared the observed proportion of positive responses (60.8%) with a neutral outcome of 50%. The findings indicated that z-score was rounded to 2.16 that exceed the critical value which is - 1.96 at 5 percent level of significance. Thus we can reject the null hypothesis and state that the proportion of users who became more confident with the help of the training is statistically significantly above a neutral base level.

But it is also necessary to mention that 17.3 percent did not agree or strongly disagree, and 21.7 percent were neutral. These differences imply a range of experiences that were presented by participants and outline that, although the training at a broader level was effective, it did not address the need of all users successfully. The training might not have been productive especially to those who lack technical exposure or have a different learning preference. This implies that a part of the team could utilize more differentiated plans, which could be in the form of role-based teaching, additional time to rehearse or individualized support.

The results are directly linked with the research question because it was necessary to estimate the user comfort and confidence after the training course. Although the program has been able to

establish a baseline of confidence in most, the information suggests that additional efforts to complement it, like regular and adaptable trainings and individual learning chances, would help in lifting the rate of CRM use and make it certain that all participants of the sales force have the continuity of confidence.

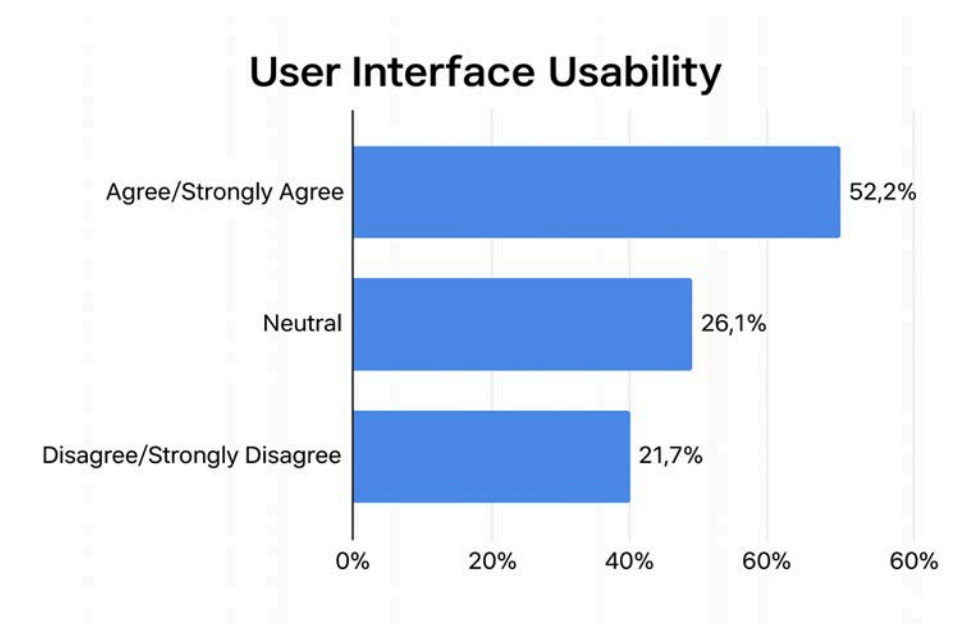


3.4.2 User Interface Usability

The impressions about how well the CRM interface is going to be used are rather positive and directly serve the purpose of the research that is to measure the level of comfort and confidence with using the end-user interface after the training time period. Based on the results of the survey, 52.2 percent of the respondents concurred with the idea that the system is intuitive, handy and findable. This represents that most of the users had the confidence to apply their training in real-time and especially when faced with high-pressure tasks such as sales tasks meaning that the training was able to produce an initial level of knowledge on the layout and operation of the system.

To assess the significance of the ease of use in terms of statistically significant confidence and ease, a one-sample proportion z-test was done. Using the fifty-percentage mark as the null benchmark, the resultant proportion at 52.2 % gives a z-value approximately equal to 0.44 (non-significant), at the 5% level (critical $z = 1.96$). This means that, despite the fact that more than half of the users were comfortable working with the interface, the statistical difference cannot be regarded as a strong baseline to attribute high levels of comfort on the part of the whole population. Another breakdown indicates that 21.7 percent of the users disagreed and 26.1 percent was neutral, constituting almost half of the 48 percent of the respondents who did not indicate definitely that they felt comfortable and secure. This is a significant percentage that raises the issue of possible concern: the training might not have served all the intended objectives as regards the challenges pertaining to system navigation and usability in real time. Something like unintuitive design, slow performance of the whole system, or poor interface design could have affected user experience, especially those in a time-constricted environment.

The findings point to the fact that the interface of the system may have been effective to a small majority, but there exists a significant proportion of users who do not feel completely comfortable or confident in their ability to use the interface. Therefore, to enhance the overall training performance and the rise of CRM utilization, the design of the interface can be improved, namely by transitioning to easier navigation, user customisable dashboards, mobile responsiveness, and the speed of the system. This can enhance user comfort to a substantial extent where the persons who were least successful despite the same amount of training were concerned. Finally, the usability of the CRM interface impacts the user confidence after training to a moderate extent, and it need to be polished further to stabilize comfort among the sales team members.



b) To explore the impact of the new CRM on the business of the organization

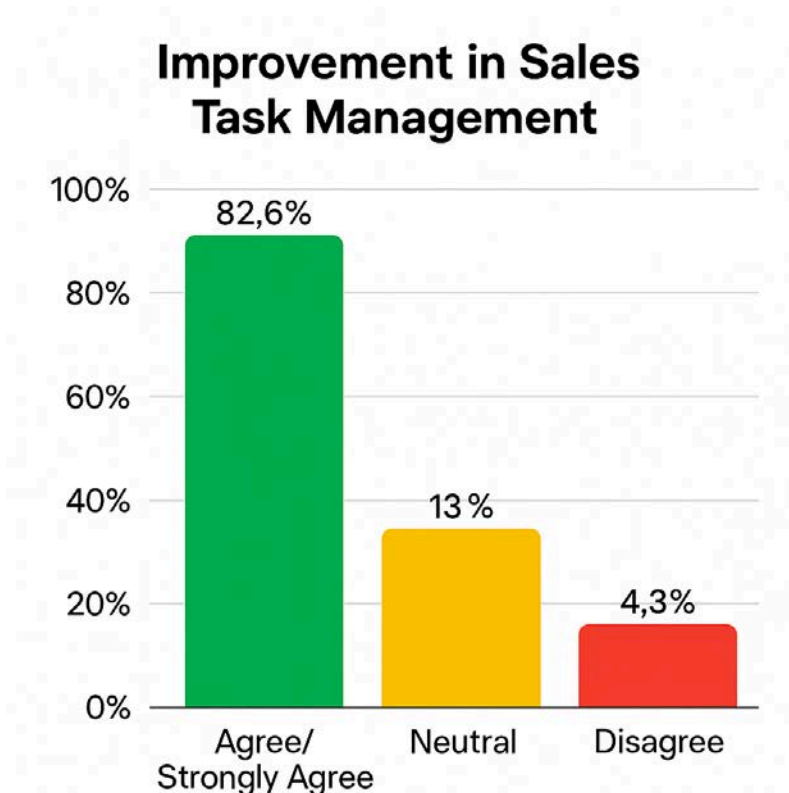
3.4.3 Improvement in Sales Task Management

The knowledge indicates a statistically significant change in sales operations when the adopted system of new CRM is adopted. As many as 82.6 percent of the respondents concurred that there was an enhanced aspect in dealing with leads, follow-ups, and even the ability to retrieve customer information. Such overwhelming majority confirms the conclusion that the CRM has brought significant efficiency to the operations, especially the centralization of the information about the customers and automatization of the routine activities. Such enhancements must have helped to eliminate the occurrence of human errors and ease the performance of sales functions.

To determine the severity of this improvement statistically, a one sample proportion z-test was done, with the percent of agreement (82.6) being compared with a hypothetical and neutral baseline (e.g. 50%). The outcome of the z-score is appr. 8.23 which is much greater than the critical value of 1.96 (at a significant level of 5%). This underlines the idea that the positive effect being observed is so statistically great, that it could not be attributed to sheer luck. The null hypothesis namely of the absence of a measurable difference by the CRM is thus rejected.

It is worth mentioning that none of the respondents expressed discontent with the effects of the CRM on their work. Trial users who were neutral were just 13 percent, so perhaps some gaps such as training or technical or individual preference persist. Nevertheless, this is also a percentage which cannot decrease the immensely favorable response to the efficiency of the CRM and usefulness in contemporary sales activities.

It is concluded that the high level of acceptance implies effective implementation, along with a strong scaling up capacity of the CRM to other departments or branches, raising the productivity of the entire organization. Additionally, the morale created during the implementation of the CRM is a good pointer of its application in improving intra-system coordination and organization, quicker decision-making process and improved client interaction. Finally, judging by the statistical findings and also by the user opinion, the new CRM platform has made a profound and positive contribution to the company functions, which further highlights the importance of the CRM as a strategy towards organizational performance.



3.4.4 Impact on Productivity and Decision-Making

This discussion provides useful information on how the CRM system affects the productivity of an organization as well as its decision-making process. Based on the manifest, about 65.2 percent of the respondents concurred that the CRM has had a positive influence on their capabilities to come with better and quicker decisions. This implies that the functions of the system, i.e., real-time data access, automated reporting, and analytics on sales are effectively helping the users to react to customer demands and stay flexible to market conditions. The capabilities are essential in facilitating a more competitive and agile sales process.

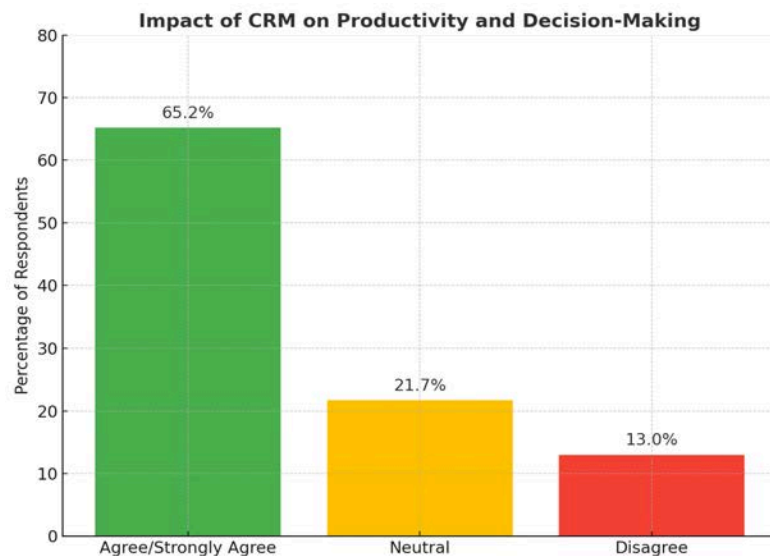
To see whether this perceived improvement is significant or not, a one-sample proportion z-test against an indecisive standard of 50 percent was performed. The outcome given is the z-score = 3.03-coin value, which is more than the critical value of $\alpha = 1.96$ when a 5 percent level of significance is provided. This implies that the null hypothesis (the CRM does not significantly impact productivity and decision-making), can be rejected, and this allows saying that the shown positive effect of the CRM on the processes mentioned above is statistically significant.

But upon further inspection they cut to the reality that 13 percent of the respondents responded that they are against and 21.7 percent of the respondents were in the middle. This 34.7 percent in non positive answers indicates a critical inclusion in user experience. Although most people have derived value in the system, a major segment of its consumers might not be deriving full benefit out of it. The variations could be caused by the lack of integration in individual work flows, generality of features that have no relation to roles, or the inability to generate practical insights because of the issues relating to the quality of data or the complexity of the systems.

The findings here indicate that the CRM system has improved significantly and is serving most of the users well but its complete potential is yet to be achieved in a widespread manner. The organization ought to be keen on:

- Improving the customization of dashboards
- Mechanization of monotonous chores
- Optimizing analytics and reporting capabilities

With a closer adaptation of the system to the needs of a particular role and expectations of the user, and an elimination of technical areas of friction, the CRM will become an even more significant instrument in the area of internal optimization. This would also probably translate into more consistency in productivity increases and a confident decision making, thus better business performance on a more holistic organizational scale.



3.4.5 Perceived Business Impact

Such an analysis will help to understand the perception towards the CRM system regarding its effects on the efficiency of sales and the performance of the whole company. According to the survey results, 56.5 of respondents admitted that there was a quantifiable increase in such sectors, as sales coordination, accuracy of data on customers and the interdepartmental communications. The issues covered by these improvements are determinantal in obtaining business efficiency and the fact that CRM is working positively to enhance the core functions of the operations.

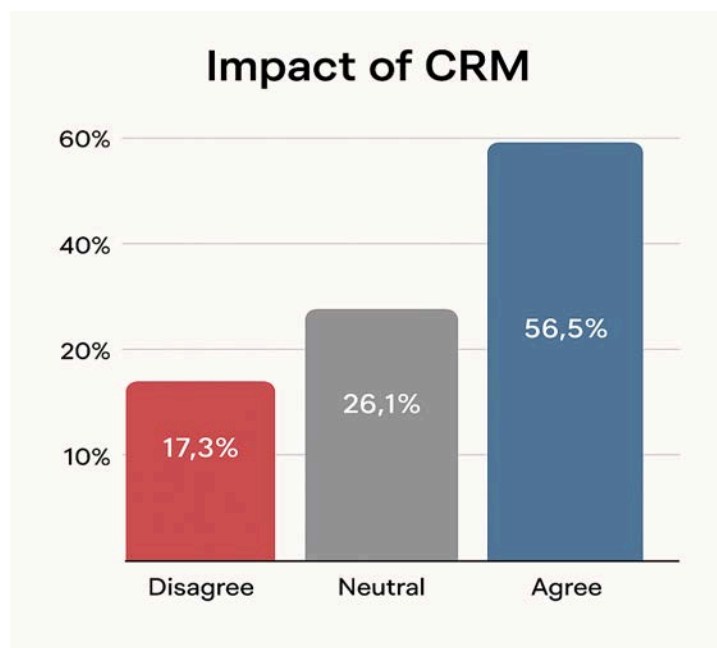
In order to statistically justify such a perception, one sample proportions z-test was conducted, where the observed rate of agreement (56.5%) was compared against an unprejudiced standard of 50 percent. The estimated z-value is 1.3 that is not larger than the critical $z = 1.96$ at the 5 O; significance level. This implies that, there is a high positive response rate, higher than the average yet it is not very significant to prove that the effect of the CRM is not perceived universally throughout the organization.

This is consistent with the existence of the disagree and neutral answers at 17.3 percent, 26.1 percent, respectively, which summed together comprises a substantial 43.4 percent of the participants who do not particularly observe improvement. Such separation implies that the inclusion of CRM into the bigger business operations remains incomplete and not all users can associate the capabilities of the system with actual business profits. The causes of this gap can be related to the lack of transparency of the organizational-level performance, the remnants of low efficiency, or the lack of transparent communication regarding how the CRM can facilitate the achievement of the strategic goals.

In an attempt to fill this gap, the management ought to pay attention to:

- Sharing the results of the CRM in a clear performance reporting and success cases,
- Putting in place feedback systems which would determine where the system is failing to live up to expectation,
- Extend the capabilities of the CRM, so that more departmental processes are included in CRM workflows to provide greater cross-functional visibility.

As the system develops and encompasses more factors in the organization, there can be a greater correlation between the features of the system and the general business objectives. This is expected to enhance more consistent adoption, user confidence and ultimately position the CRM as a game changer as far operation integration and strategic execution is concerned.



3.4.6 Summary of the Analysis

The critique of the implementation of CRM system showed that the perception was ambivalence in general in most of the five areas. In terms of training efficacy, about 60.8 percent of respondents answered that the training was effective and fully equipped them to deal with the day-to-day sales activities and this shows that the trainings were effective in covering the essential parts of the system. Nevertheless, 17.3 percent were dissatisfied, and 21.7 percent did

not express any feeling, which indicate that the training might not have taken into consideration the difference in user experience or preferences in learning. This gap may be bridged with additional physical or even role-specific or refresher training. Regarding usability of user interface, the feedback was moderately positive with 52.2 percent stating the interface to be intuitively and easily used even while under pressure but the key failure (21.7 percent) or the individuals were simple not indifferent (26.1 percent). This means that it requires an enhancement of the interface, including a more generous level of navigation, simplification, better response, and mobile contextualization to contribute to a more desirable experience. Particularly, the greatest positive feedback was provided by the sphere of sales task management. More than 82.6 percent of users claimed to have increased their effectiveness in managing leads, scheduling follow-ups, and viewing customer information, which indicates that the CRM goes a long way in automating the major operational processes and contributing to day-to-day sales processes.

Decision-making and productivity were also positively affected where 65.2 percent of the respondents felt that the system has assisted them in putting in more efficient work as well as making sounder decisions. However, 13% did not agree and even 21.7% did not express their opinion, which is a sign of the possibility to do better at both personalization of CRM tools to workflow and better clarity of actionable insights. Last, views about the overall business effect of the CRM were more polarized. Although 56.5 percent opined that positive influence on sales liaises, data accuracy and inter departmental communications was immeasurable, 17.3 and 26.1 percent disagreed and were neutral respectively. This signifies that on the one hand, there could be a disparity between the user experience and the organization-level visibility of the system. To fill this gap, management ought to strengthen the strategic importance of the CRM in terms of performance measures, track records as well as ongoing fine-tuning. Altogether, although the CRM system has evident strong points and especially sales operations software, the need to improve training, interface design, customization, and cross-functional integration could make the software much more effective in its work and acceptance organization-wide.

3.4.7 Key Insights

On the whole, the results indicate a positive attitude to the interface and functionality of the CRM system, and in the aspects of the layout, ease of use and responsiveness, in particular. The effectiveness of the training process and the timeframes of adaptation are predominantly concentrated on the satisfactory level, but there is a necessity to improve the feedback incorporation and the enhancement of the advanced functions. The evidence proves the fact that the present CRM version is technically competent and largely user-accepted, though implementing the UI and greater involvement of the user in any further modification could make the system much more acceptable and contribute to the personnel productiveness of the sales team.

3.5 Summary

In this paper, the researcher aimed to examine and evaluate the user experience and the process of adaptation of sales personnel using the new CRM system offered by B-Trac Engineering Ltd. based on Odoo program. The determination of the extent to which the CRM can serve operational requirements of the sales team was to be assessed by paying attention to the primary usability aspects like interface design, system responsiveness, adequacy of training, and general user satisfaction.

The results indicate that the CRM has been an effective tool as compared to its users. With initial impressions and daily use, the interface was deemed easy to understand, visually consistent and internally consistent. Most of the sales individuals noted that the functionality and controlling location of the dashboard was easy, and most of the objectives could be accomplished without much outside support. Also, elements of aesthetics, such as typography visibility and color contrasts, also played a positive role in the usability of the system.

The CRM exhibited stable performance and responsiveness as far as the system performance is concerned. The majority of the users admitted to fast response of the CRM to the input and to smooth switching between modules. Advanced search and filter functionality were however found to have some weaknesses, therefore, this part can be improved technically. Positively, there was rarely any downtime and system crashes, which indicates a well-built system structure.

The training and adaptation part of the study brought about with it the conclusion that the onboarding process was considered adequate to the majority of employees, but a rather large, though marginal, percentage of employees responded that there was a moderate learning curve. However, support materials were highly available and the majority of the users claimed to have adjusted to the system in a reasonably extended period. These results indicate that user support infrastructure provided by B-Trac has proven its worth, but some dedicated adjustments of the training module may help with system onboarding even further.

Finally, the source of positive influence on the effectiveness of work by the CRM is proved by the general level of satisfaction, where there is a significant percentage of users stating that the system allowed to improve the efficiency of its work with sales. However, one common theme developed in the need to keep on improving the designs and incorporating other user feedbacks well. Despite the favorable baseline of functionality and usability that the system has to offer, the engagement of end-users in the development process of the system may likely enhance its future uptake to an even more significant level.

3.6 Conclusion

The results of the research obviously show that new CRM system has had a favorable effect on both the final users and the business as a whole in B-Trac Engineering Ltd., and in accordance with the research objectives. Among the most important was to measure end-user comfort and confidence after completion of the training period and the findings reveal that a major proportions of the sales personnel is becoming more comfortable and able to use the system. More than 60 percent of the participants in the survey indicated that they were confident with what they had been taught and more than half of them confirmed how the interface of the system was intuitive; this shows a clear indication that the users had not found difficulty in adjusting to the CRM environment. Easy access to information and user-friendly interface with the dashboard

navigation have helped to increase the level of comfort of the users, even in conditions of active sales and high demand of the sales activity.

Meanwhile, the effect of the CRM on the business is also impressive. A significant number of the respondents indicator is the ability of the system to enhance management of sales tasks, productivity, and decision-making. Such features as access to data in real-time, analytics on sales, automation of operations that need to be done regularly have helped the sales people work smarter and increase their responsiveness to the needs of the customers, as well as make better decisions. Moreover, it is clear that the CRM has also made great contributions to the process of sales coordination, the decrease in operational however an indicator of positive changes in the overall performance of the organization.

Although there are still certain areas to be bridged in terms of perception and integration, particularly that area of consumers who need to receive more specific assistance or want their system to be customized more profoundly, the overall trend indicates the increasing level of acceptance, satisfaction, and trust in the system. These findings are highly supportive of the fact that the CRM is transformational to the company not only in enhancement of individual performance, but also towards the achievement of more strategic objectives.

To sum up, the CRM has already achieved its targeted goals: end-users start being confident and feel comfortable, and the organization enjoys increased efficiency of the operation, workflow, and decision-making. By offering more and more support to the trained users and the interface refinements, and wider application among different departments, the system can become even a more significant source of long-term business prosperity.

3.7 Recommendations

A number of strategic guidelines are suggested as a way of improving the long-term performance and usability of the newly adopted CRM system. To start with, there is the need to improve the search and filtering capabilities to aid faster access of the information, at least among the field sales professionals that have vast databases of clients. Second, respective training module needs

to be extended and customized with role specific walkthroughs, interactive simulation, and refreshers to both new and existing users. This will save on the time needed to adapt and also increase confidence among users. Third, it would be advisable to incorporate a systematic feedback system, e.g. quarterly user surveys/focus group discussions to enable the CRM development team to provide reliable feedback directly to the salesforce and to have each of the user concerns consider in the next release. Additionally, the mobile interface should be optimized and tools like voice-to-the-text input should be incorporated to enhance CRM functionality among the sales executives who are busy and on the move. Finally, the dashboard customization feature will provide users with the ability to personalize the interface to their own workflow, so it will be more effective and satisfactory. Implementing these recommendations, B-Trac Engineering Ltd. may enhance user experience, develop more meaningful interaction, and guarantee that the CRM system will still meet the most recent operational requirements.

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