DevRev - Getting Started

Typescript Application for CRM Integration

Introduction to CRM

Customer Relationship Management (CRM) enhances customer relationships and business growth by using Information Technology to identify, acquire, and retain customers.

What is CRM?

- **Management Perspective**: Developing and maintaining profitable customer relationships.
- **IT Perspective**: Software aiding in marketing, sales, and service operations.
- **Academic Perspective (Francis Buttle)**: Integrates processes and networks to deliver value and profit using customer data and IT.

Ingredients of CRM

1. **Analytics**: Observing trends through data visualization.

2. **Business Reporting**: Accurate sales, customer care, and marketing reports.
3. **Customer Service**: Collecting and sharing customer information.
4. **Human Resource Management**: Optimal placement of employees.
5. **Lead Management**: Tracking sales leads and managing campaigns.
6. **Marketing**: Implementing sales strategies.
7. **Workflow Automation**: Streamlining processes to reduce costs and time.

Objectives of CRM

1. **Improve Customer Satisfaction**: Enhance loyalty through engagement and feedback.
2. **Expand Customer Base**: Manage and create knowledge for prospective customers.
3. **Enhance Business Sales**: Close more deals and improve forecast accuracy.
4. **Improve Workforce Productivity**: Organize work for efficient task management and customer follow-up.

Now, let's start learning from an example-

Ravi, a diligent support engineer, found himself at the forefront of the customer experience team in a rapidly growing tech company. His role was critical, serving as the bridge between customers and the engineering team. Each day presented a new set of challenges as he navigated the intricate web of customer feedback, queries, and technical issues.

His routine typically started with interacting directly with customers, understanding their concerns, and gathering valuable feedback. Ravi was the face of the company in these moments, ensuring that customers felt heard and valued. However, the manual process of collecting and documenting this feedback was time-consuming and prone to errors.

Once armed with customer insights, Ravi would relay this information to his engineering team. Coordination was key, but the back-and-forth communication sometimes led to delays and misinterpretations. He often found himself juggling multiple tasks simultaneously, struggling to maintain the delicate balance between addressing immediate customer needs and communicating effectively with his engineering counterparts.

Despite Ravi's efforts, there were inherent pain points in the process. The manual transfer of information from customer interactions to the engineering team was a bottleneck. Additionally, tracking the progress of each issue became challenging, making it difficult to provide accurate and timely updates to customers.

As the company continued to grow, the need for a more streamlined and efficient process became apparent. Ravi started looking for a solution that could automate certain aspects of his workflow. Implementing automations in the following areas could significantly enhance the quality and efficiency of his work:

Solution: DevRev OneCRM

DevRev OneCRM provided:

- **Integrated Communication Platform**: Seamless team connection.
- **CRM Integration**: Smooth coordination with sales and marketing.
- **Automated Reporting**: Accurate and consistent reports.
- **Issue Prediction**: Proactive management with machine learning.
- **Efficient Workflow Management**: Task automation and progress tracking.

Implementing Automations

DevRev OneCRM offers snap-ins for integration:

- **Integrations**: Connect with Slack, Jira, etc.
- **Automations**: Perform tasks based on events.
- **Imports**: Sync data from external sources.

Result

DevRev OneCRM improved Ravi's workflow, enhancing customer interactions and enabling better product and service tailoring.

Getting Started

- **Build Manual**: Use DevRev's build manual to create automations.
- **Marketplace Snap-ins**: Utilize available snap-ins for additional functionality.

- [Link to Glossary](#)

What is the DevRev platform?

DevRev is a platform designed to bridge the gap between product development and customer support. It aims to integrate various functions within a company to create a seamless, efficient workflow that centers around the customer experience. Here's a simplified overview of the DevRev platform and its key features:

Overview of DevRev Platform:

1. **Purpose**:
   - To unify product development and customer support.
   - To enhance customer experience by integrating feedback directly into product improvements.
2. **Key Features**:
3. **Unified Communication**:
   - Integrates different communication channels (e.g., Slack, email) to ensure seamless interaction between teams and customers.
4. **Customer Relationship Management (CRM)**:
   - Manages customer interactions and data, helping teams keep track of customer feedback, issues, and support tickets.
5. **Product Development Integration**:
   - Connects customer feedback and support tickets directly with development tasks, ensuring that customer needs are reflected in product updates and bug fixes.
   - Real-time updates between customer support and development tasks via GitHub and other development tools.
6. **Automation**:
   - Automates repetitive tasks such as ticket assignment, status updates, and reporting.
   - Uses machine learning to predict issues and address them proactively.
7. **Analytics and Reporting**:
   - Provides detailed analytics and reporting tools to track customer satisfaction, support efficiency, and development progress.
8. **Customizable Workflows**:
   - Allows businesses to tailor workflows to their specific needs, enhancing efficiency and collaboration across teams.
9. **Snap-ins**:
   - These are add-ons or modules that can be integrated into the DevRev platform to extend its functionality. Examples include integrations with

tools like Slack, Jira, or GitHub for better synchronization and workflow management.

Practical Use Cases:

- **Support Teams**:
  - Manage customer tickets, provide timely responses, and track resolution progress.
  - Use integrated communication tools to stay connected with customers and other teams.
- **Development Teams**:
  - Link customer issues directly to development tasks to ensure that product improvements are driven by actual user feedback.
  - Collaborate with support teams to understand customer needs and prioritize development efforts.

- **Product Managers**:
  - Gain insights into customer feedback and support trends to make informed decisions about product roadmaps and feature prioritization.

Example Scenario:

Imagine a support engineer named Ravi using DevRev. Ravi faces daily challenges in managing customer feedback and relaying it to the development team. By using DevRev, he can:

- **Streamline Communication**: Automatically link customer tickets to related development tasks, ensuring that engineers are aware of customer issues.
- **Automate Tasks**: Set up rules to automatically assign tickets to the right team members and update statuses based on progress.
- **Analyze Data**: Generate reports to understand common issues, track resolution times, and measure customer satisfaction.
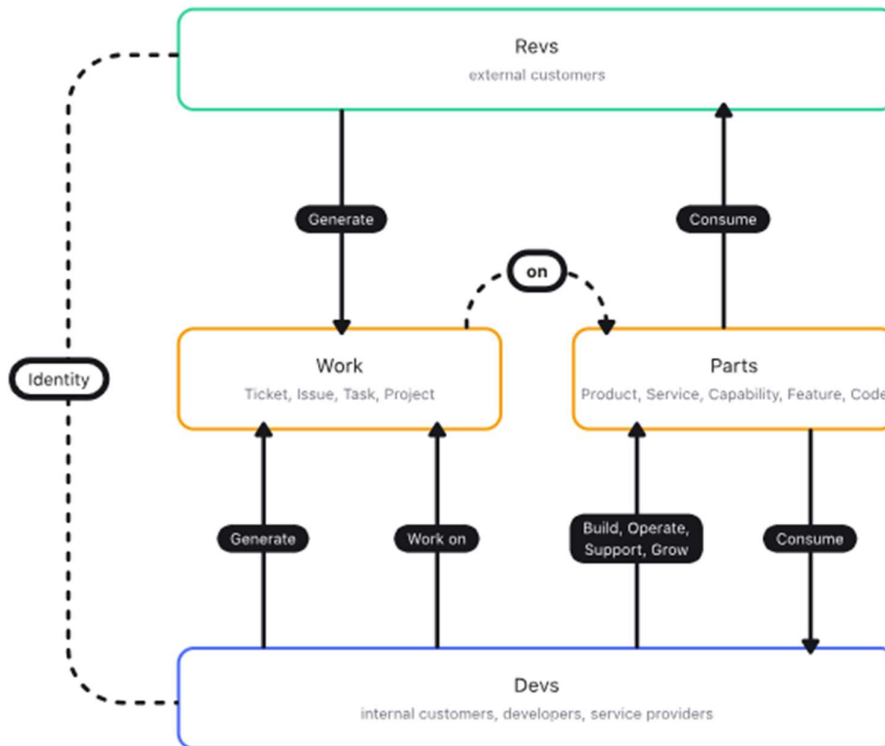
Webhooks?

Webhooks are automated messages sent from apps when something happens. They have a message—or payload—and are sent to a unique URL—essentially the app's phone number or address. Webhooks are almost always faster than polling, and require less work on your end.

webhooks are a powerful and efficient way to enable real-time communication and integration between different applications and services.
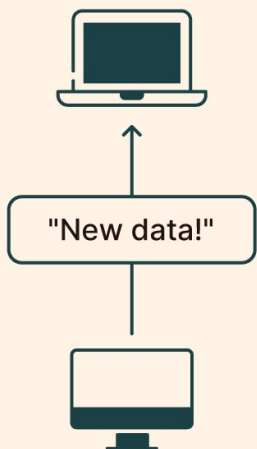
Webhooks

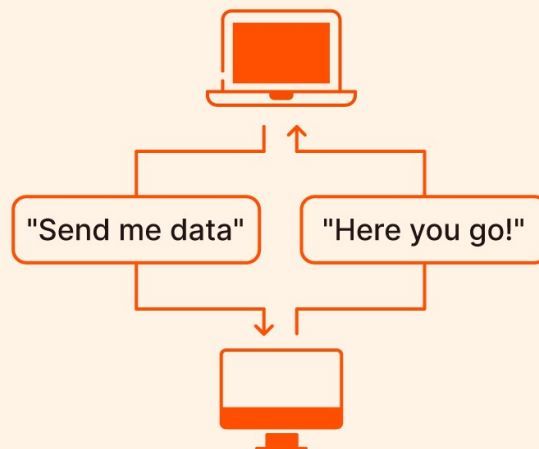Updating customer info in your CRM

Sending automatic reminders

Notifying users of a stock market update

Webhooks

"New data!"

APIs

"Send me data" "Here you go!"

_zapier

What is a snap-in?

A snap-in is like an add-on or extension that you can attach to a main program to give it extra features and tools. You can add or remove these snap-ins as you need, which helps you customize the program to do exactly what you want. This way, you can make your work environment just right for your tasks.

Snap-ins are add-ons for DevRev that enhance its capabilities. They include:

- Integrations: Connect DevRev to other apps like Slack or Jira.
- Automations: Automatically handle tasks within DevRev.
- Airdrop: Import data from other sources.

You can also build custom snap-ins using DevRev's APIs.

What is a DevRev CLI ?

The DevRev CLI (Command Line Interface) is a powerful tool that allows you to interact with the DevRev platform directly from your terminal. This can be particularly useful for automating tasks, integrating DevRev into your existing development workflows, and managing projects without needing to constantly switch to the web interface. Here are some key functionalities you can perform with the DevRev CLI:

Key Features of DevRev CLI

1. **Issue Management**
   - **Create Issues:** Create new issues directly from the command line.
   - **Update Issues:** Edit existing issues to update their status, description, or other attributes.
   - **List Issues:** Retrieve and display a list of issues, filtered by various criteria.
   - **View Issue Details:** Get detailed information about specific issues.

2. **Project Management**
   - **Create Projects:** Initialize new projects within DevRev.
   - **Update Projects:** Modify project details, such as name, description, and status.
   - **List Projects:** Display a list of all projects, with the ability to filter based on specific criteria.

3. **Workflow Automation**
   - **Automate Tasks:** Script and automate routine tasks like assigning issues, changing issue statuses, or notifying team members.
   - **Trigger Workflows:** Initiate predefined workflows or custom scripts based on specific events or criteria.

4. **Integration with Development Tools**
   - **Sync with Repositories:** Integrate with Git repositories to link commits and pull requests to DevRev issues.
   - **Pull and Push Data:** Fetch data from DevRev or push updates to DevRev from your local environment.

5. **Customer Support Integration**
   - **Manage Support Tickets:** Create, update, and track support tickets directly from the CLI.
   - **Link Feedback:** Associate customer feedback and support tickets with specific development tasks or projects.

6. **Custom Scripts and Extensions**
   - **Develop Custom Scripts:** Write and run custom scripts to extend the functionality of the CLI and automate complex workflows.
   - **Use Extensions:** Leverage existing extensions or develop new ones to add new capabilities to the CLI.

What is jq?

jq is a powerful command-line tool for parsing and manipulating JSON data. It is written in C and has become popular for its ability to perform complex JSON queries and transformations quickly and efficiently.

Here are some key features of jq:

1. **JSON Parsing**: jq can read JSON input, parse it, and then filter and manipulate it based on the user's requirements.
2. **Querying**: It allows you to query JSON data using a syntax reminiscent of XPath for XML. You can select specific elements, filter arrays, and more.
3. **Filtering and Transformation**: You can modify JSON data on the fly, transform its structure, extract specific fields, or format it differently.
4. **Scripting**: jq supports variables, functions, conditionals, and loops, making it possible to write complex scripts for JSON data processing.
5. **Output Formatting**: It can produce JSON output or pretty-printed human-readable output depending on your needs.
6. **Integration**: jq is commonly used in shell scripts, but it can also be integrated into larger programs for JSON processing tasks.

jq is invaluable for anyone working with JSON data in command-line environments, providing a concise and powerful way to manipulate and analyze JSON structures.

Enter DevRev - OneCRM: The 21st century, AI CRM
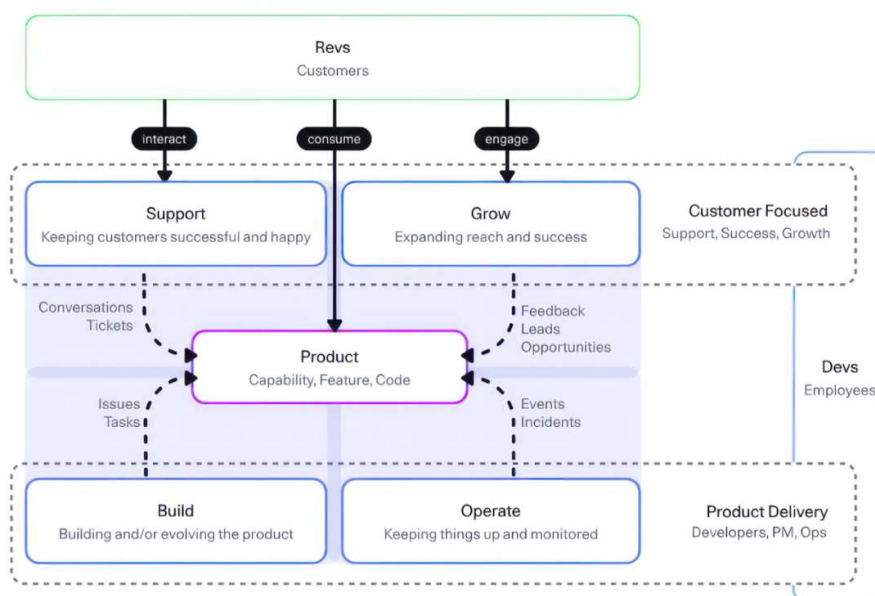
Ravi found DevRev OneCRM to be a perfect fit for all his requirements. DevRev's platform seamlessly connects identities (user, developer, support engineer, Product Managers) and parts (product, capabilities, features, APIs) by interweaving design and artificial intelligence. DevRev's platform integrated all departments with a customizable CRM, serverless workflow engine through 2 native apps: Support & Build

Support enabled Ravi to streamline customer support with product-centric customer support, featuring an in-app GPT bot, semantic search, clustering for noise reduction, product and user analytics, and real-time notifications for seamless collaboration between Customer Support teams and end-users.

Build enabled customer-centric software development powered by real-time pathways between GitHub transactions, backend issues, product enhancements, customer tickets, and user conversations, Bringing Product development closer to Customer support and End users than ever before.

Through his time using DevRev, Ravi also found that, he often found that information was still scattered across multiple platform/apps, and this varied w.r.t. his customers' usage. He needed information from other sources or information from DevRev to be accessible from other apps.

Consider the following:

- Github: To understand where certain enhancements were w.r.t Development status. So that he could follow up accordingly and set customer expectations right w.r.t
- Slack: Customers often preferred Slack as a medium of communication. Transferring customer requests into DevRev tickets would often get cumbersome.
- Mail: Notifications on mail often helped him keep track of issues/tickets etc. when on the go or when he couldn't access the DevRev app.

Ravi identified that his problems could be solved via Snap-ins present on the DevRev platform itself. Add-on modules for DevRev, called snap-ins, are available on the Marketplace. Snap-ins are one of three types.

- **Integrations** let you connect DevRev with existing systems such as Slack and Jira.
- Automations perform tasks within DevRev based on events, like responding to customer conversations and linking tickets and issues.
- **Imports** help you bring data from external sources to DevRev and keep them in sync.

As Ravi started working on DevRev, he observed a positive transformation in his workflow. The newfound efficiency not only improved the quality of customer

interactions but also allowed him to focus on more strategic aspects of support engineering. The seamless integration of data across teams resulted in a holistic understanding of customer needs, enabling the company to tailor its products and services more effectively.

In the end, Ravi's journey showcased how the strategic application of automation not only alleviated pain points in his daily tasks but also elevated the overall performance and impact of the customer experience team.

Now, let's help Ravi to create some automations on DevRev. Check the Build Manual and Get Started!

Good luck!