ZOHO
CRM

Zoho CRM: An Overview

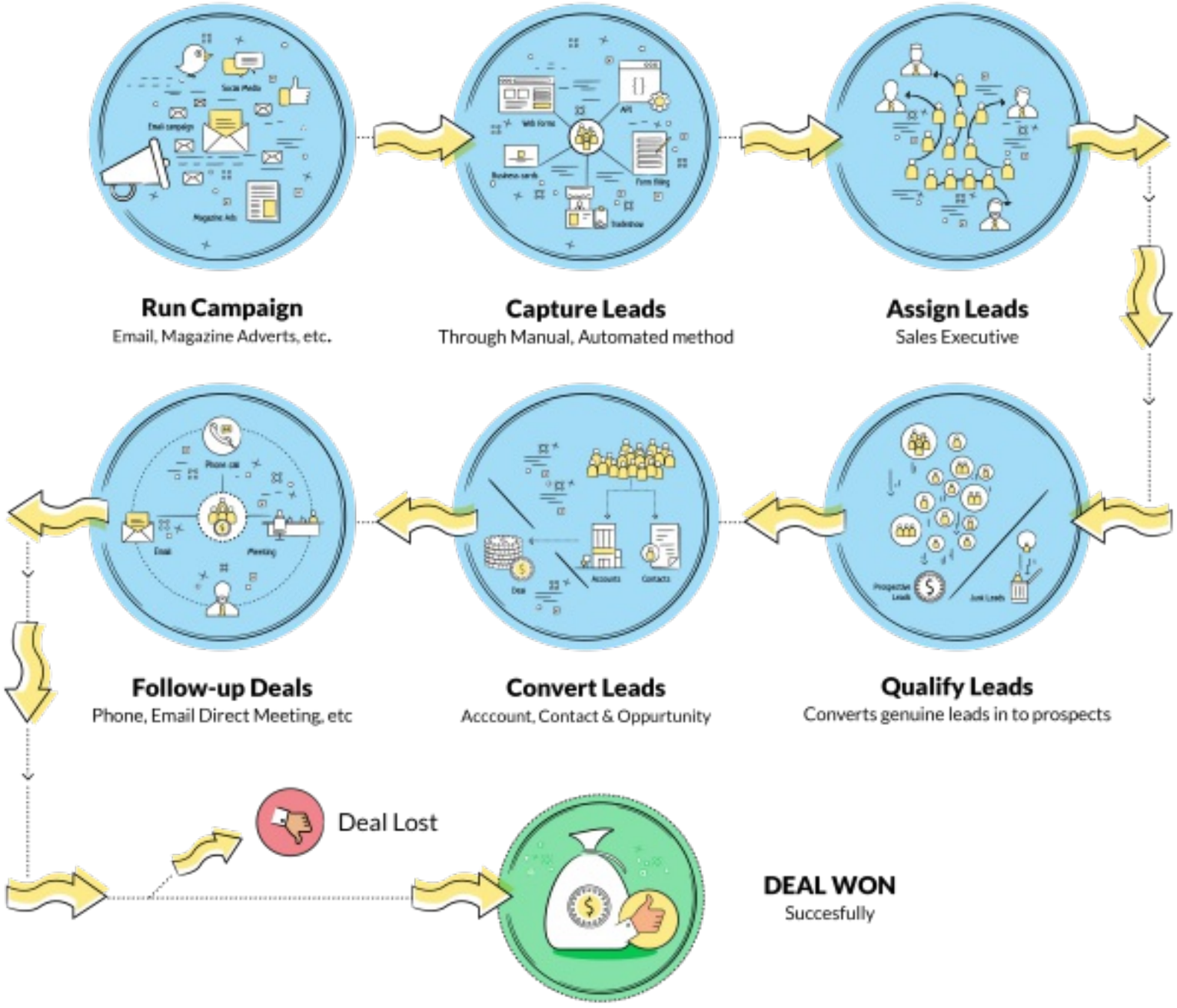
- About Zoho
- Sales cycle
- Capture leads with multichannel
- Prioritize leads
- Distribute and follow up
- Analyze sales performance
- Customize and extend

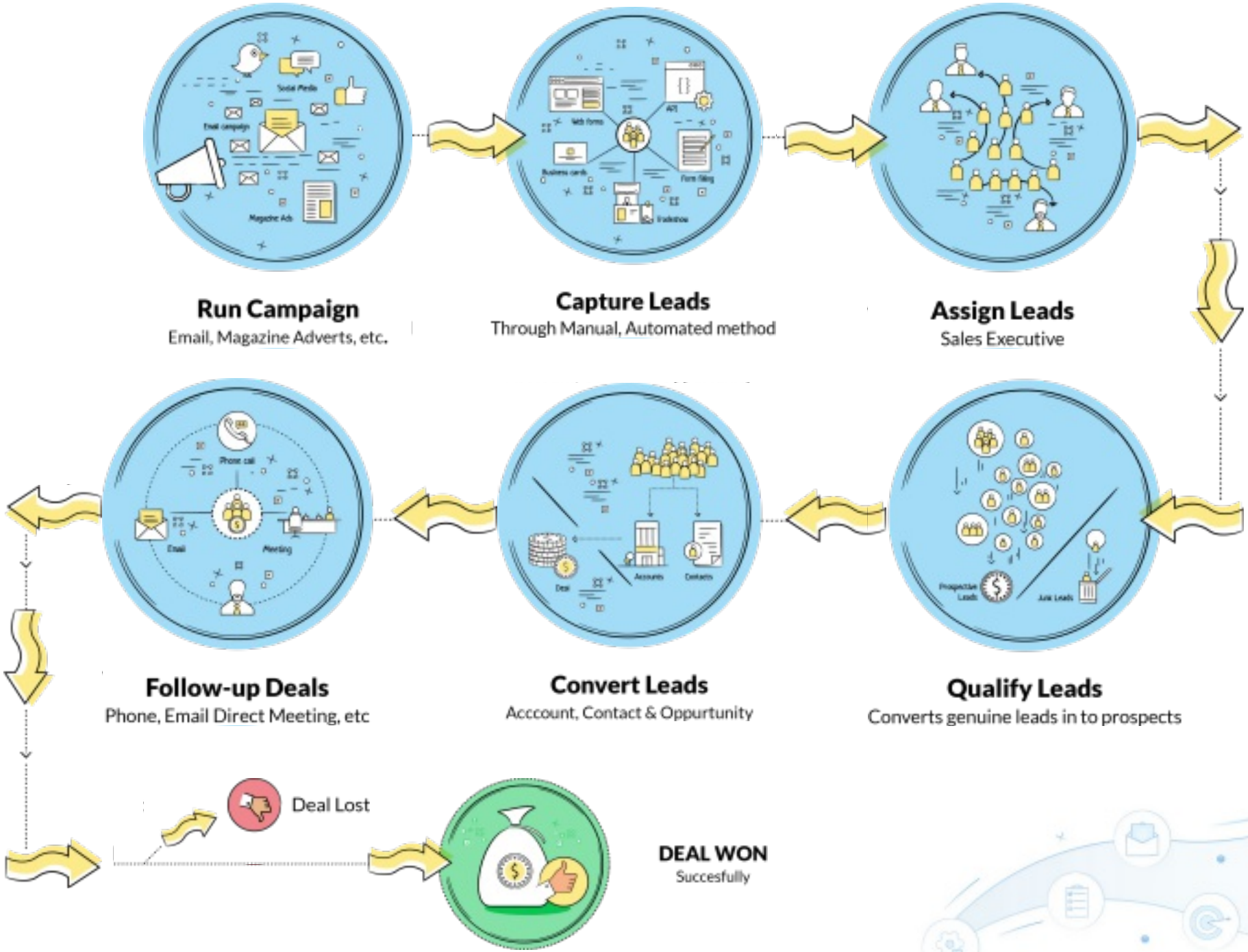
About Zoho

20 Years
4,000+ Employees
130+ Countries
Bootstrapped, Profitable
7+ Locations

Campaigns
Reports
Mail
CRM
Books
Desk
Projects

Sales Cycle


Run Campaign
Email, Magazine Adverts, etc.
Capture Leads
Through Manual, Automated method
Assign Leads
Sales Executive
Qualify Leads
Converts genuine leads in to prospects
Convert Leads
Acccount, Contact & Oppurtunity
Follow-up Deals
Phone, Email Direct Meeting, etc
Deal Lost
DEAL WON
Succesfully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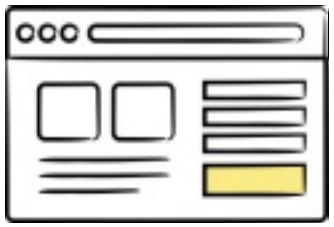
Deal Lost
DEAL WON
Succesfully

Capture leads with Multichannel

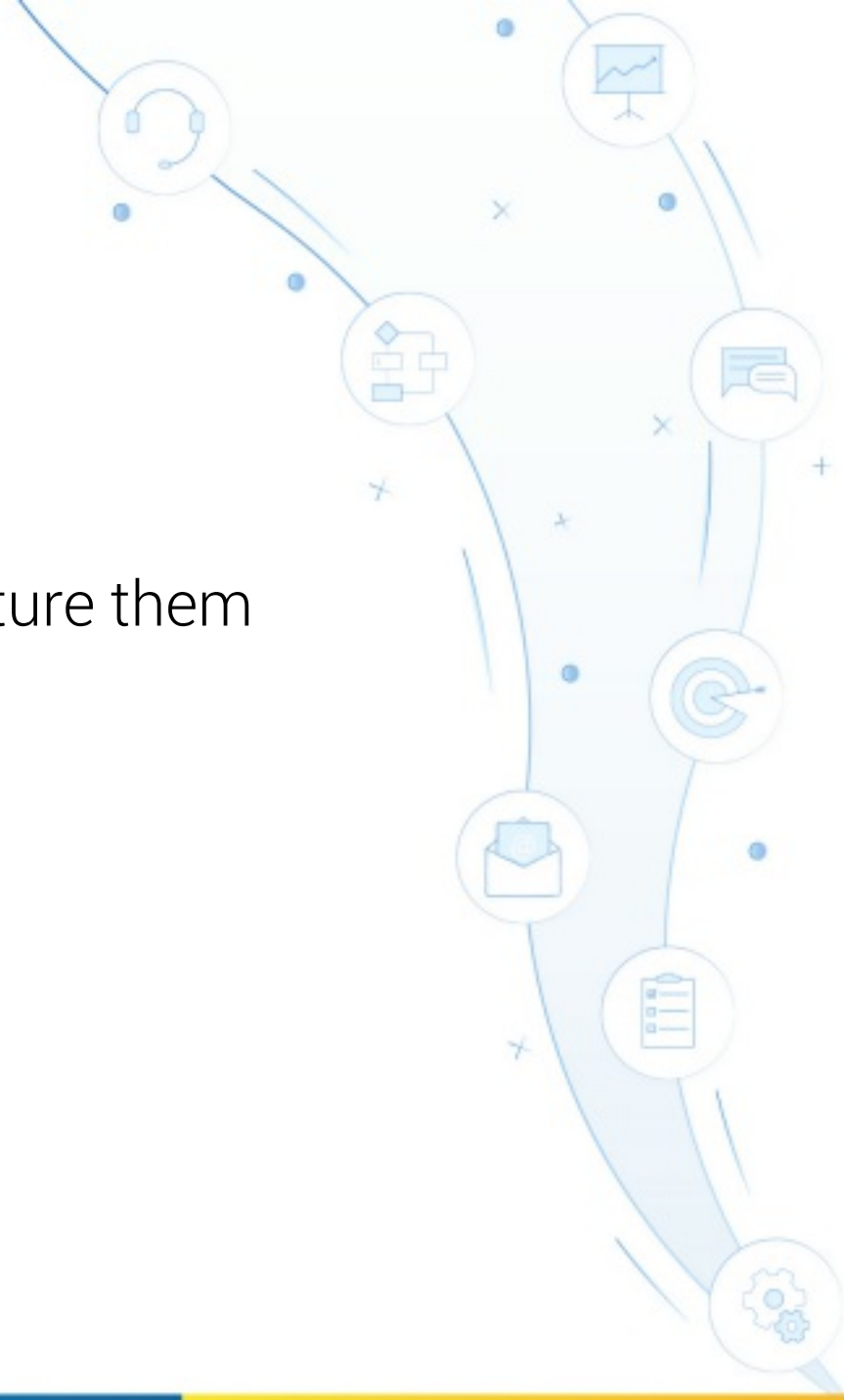
- Website
- Google Adwords
- Telephony
- Trade show
- Facebook, Twitter, LinkedIn & Google+
- Email



Website

Embed a CRM form in your website.

Make your website visitors fill in the forms and capture them as leads.



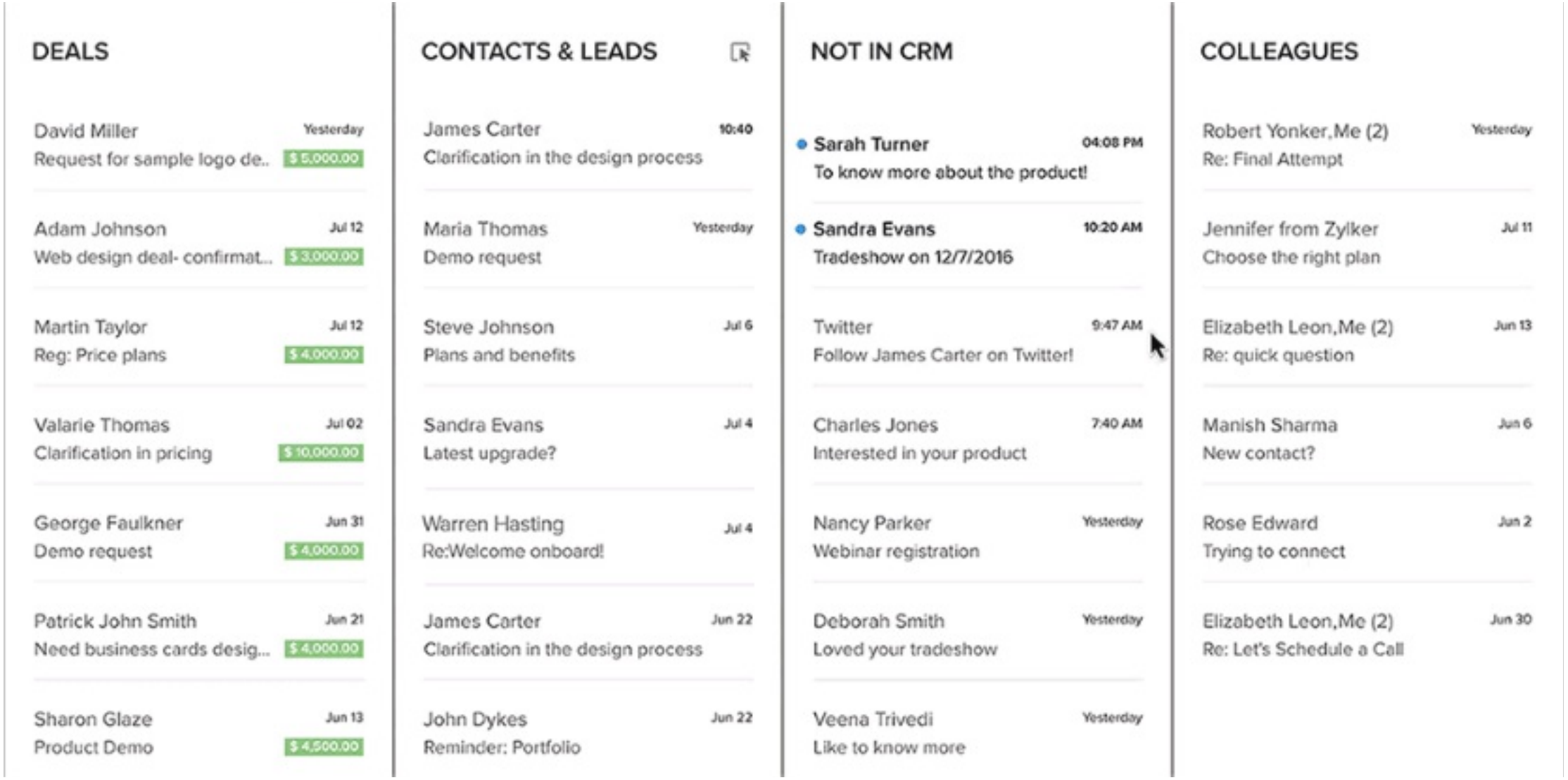
SalesInbox

First of it's kind email client.

Add leads directly from your Inbox to your CRM.

Simply drag & drop to convert leads into deals.

SalesInbox

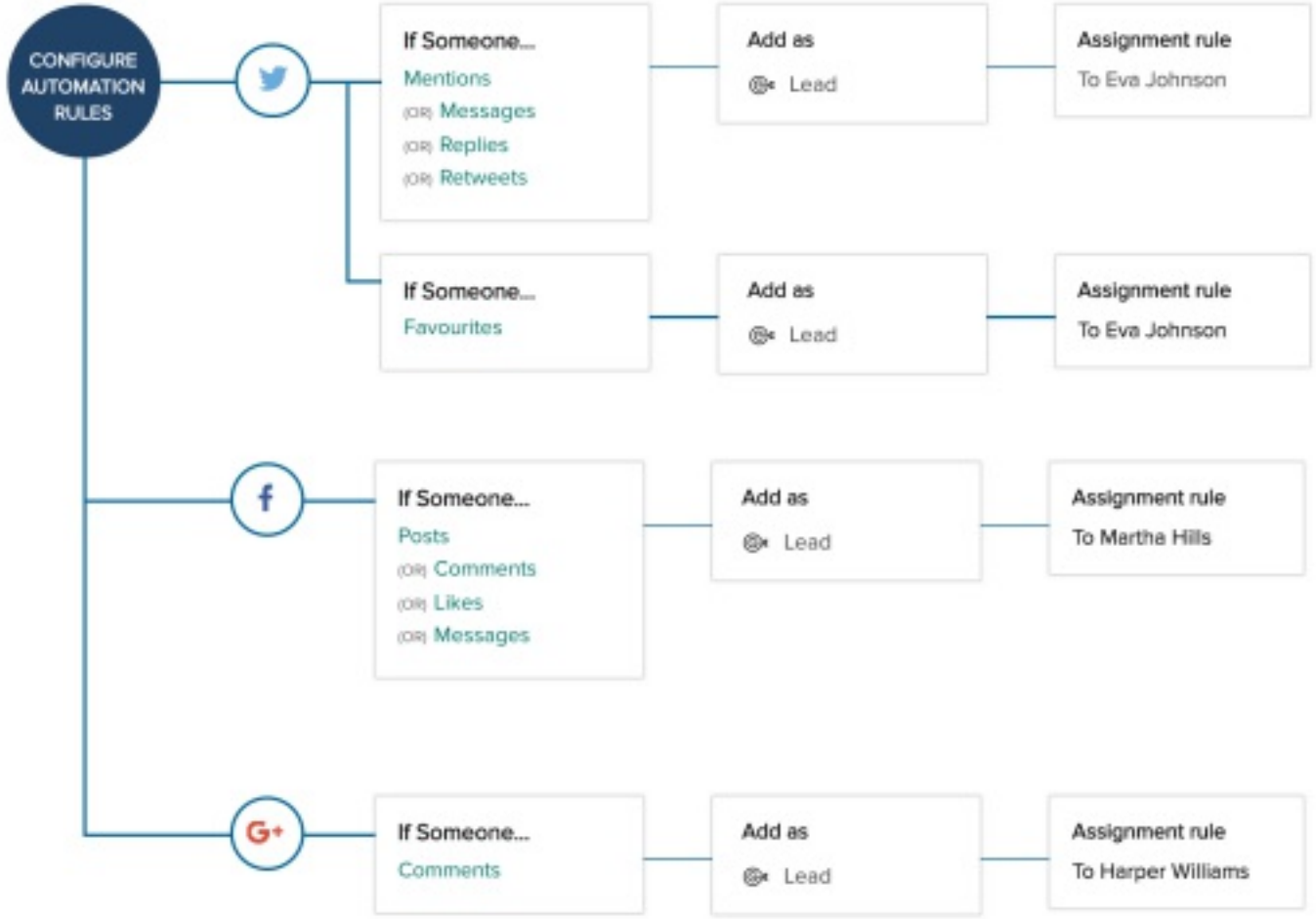

DEALS
David Miller
Yesterday
Request for sample logo de..
$ 5,000.00
Adam Johnson
Jul 12
Web design deal- confirmat...
$ 3,000.00
Martin Taylor
Jul 12
Reg: Price plans
$ 4,000.00
Valarie Thomas
Jul 02
Clarification in pricing
$ 10,000.00
George Faulkner
Jun 31
Demo request
$ 4,000.00
Patrick John Smith
Jun 21
Need business cards desig...
$ 4,000.00
Sharon Glaze
Jun 13
Product Demo
$ 4,500.00
CONTACTS & LEADS
James Carter
10:40
Clarification in the design process
Maria Thomas
Yesterday
Demo request
Steve Johnson
Jul 6
Plans and benefits
Sandra Evans
Jul 4
Latest upgrade?
Warren Hasting
Jul 4
Re:Welcome onboard!
James Carter
Jun 22
Clarification in the design process
John Dykes
Jun 22
Reminder: Portfolio
NOT IN CRM
Sarah Turner
04:08 PM
To know more about the product!
Sandra Evans
10:20 AM
Tradeshow on 12/7/2016
Twitter
9:47 AM
Follow James Carter on Twitter!
Charles Jones
7:40 AM
Interested in your product
Nancy Parker
Yesterday
Webinar registration
Deborah Smith
Yesterday
Loved your tradeshow
Veena Trivedi
Yesterday
Like to know more
COLLEAGUES
Robert Yonker,Me (2)
Yesterday
Re: Final Attempt
Jennifer from Zylker
Jul 11
Choose the right plan
Elizabeth Leon,Me (2)
Jun 13
Re: quick question
Manish Sharma
Jun 6
New contact?
Rose Edward
Jun 2
Trying to connect
Elizabeth Leon,Me (2)
Jun 30
Re: Let's Schedule a Call

PhoneBridge Platform

Integrated with more than 24 leading telephony vendors

AVAYA
RingCentral
ringio
twilio CLOUD COMMUNICATIONS
Asterisk
Vonage Business
JIVE
HubThunder
Office@Hand
IkonTel
Ameyo Engage
KIXIE
amazon web services
INCPLA telekommunikationslösungen
sipgate
ActivePBX
Go Integrator by mondago
DUOCOM
SynPBX
aircall

Social


CONFIGURE AUTOMATION RULES
If Someone...
Mentions
(OR) Messages
(OR) Replies
(OR) Retweets
Add as
Lead
Assignment rule
To Eva Johnson
If Someone...
Favourites
Add as
Lead
Assignment rule
To Eva Johnson
If Someone...
Posts
(OR) Comments
(OR) Likes
(OR) Messages
Add as
Lead
Assignment rule
To Martha Hills
If Someone...
Comments
Add as
Lead
Assignment rule
To Harper Williams

Social

Fully integrated with

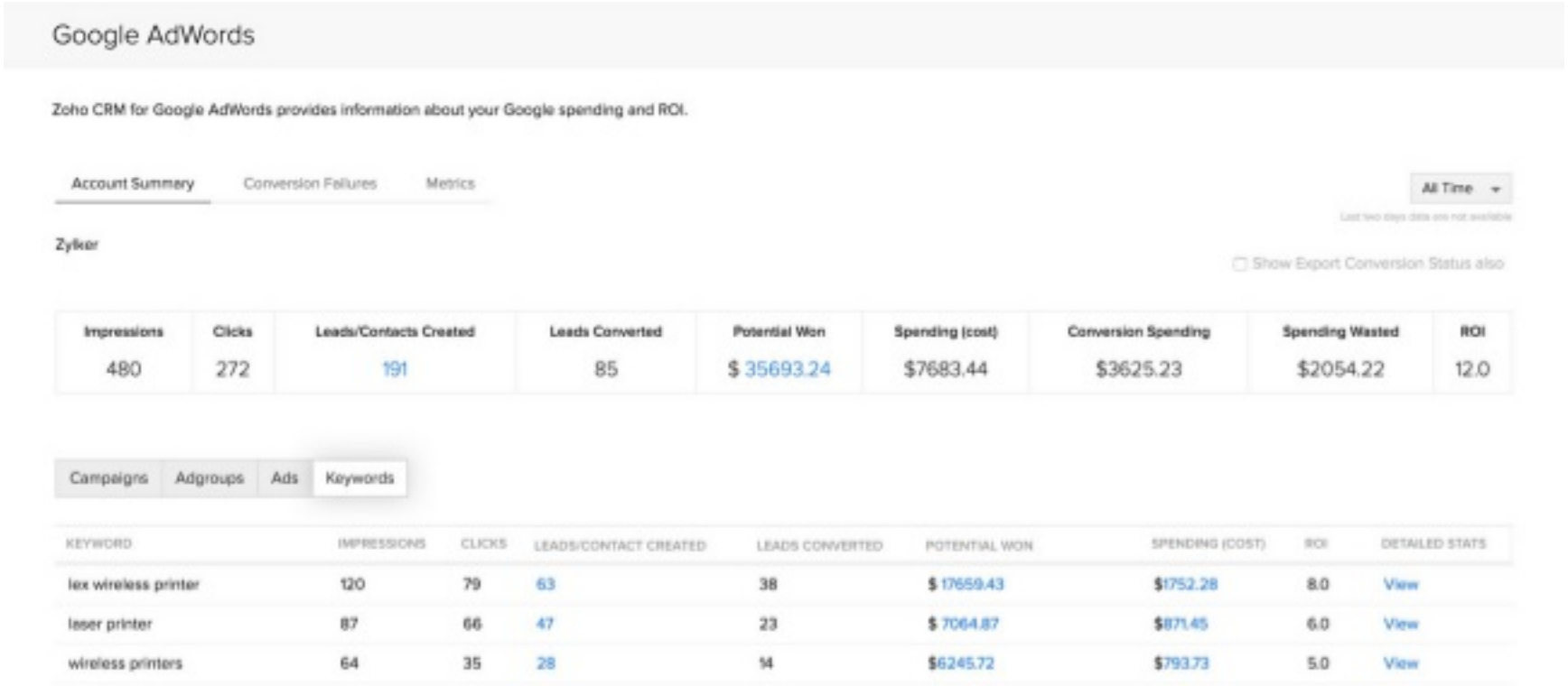
Add leads to CRM from Social channels.

Receive real-time customer actions through SalesSignals.

Google Adwords

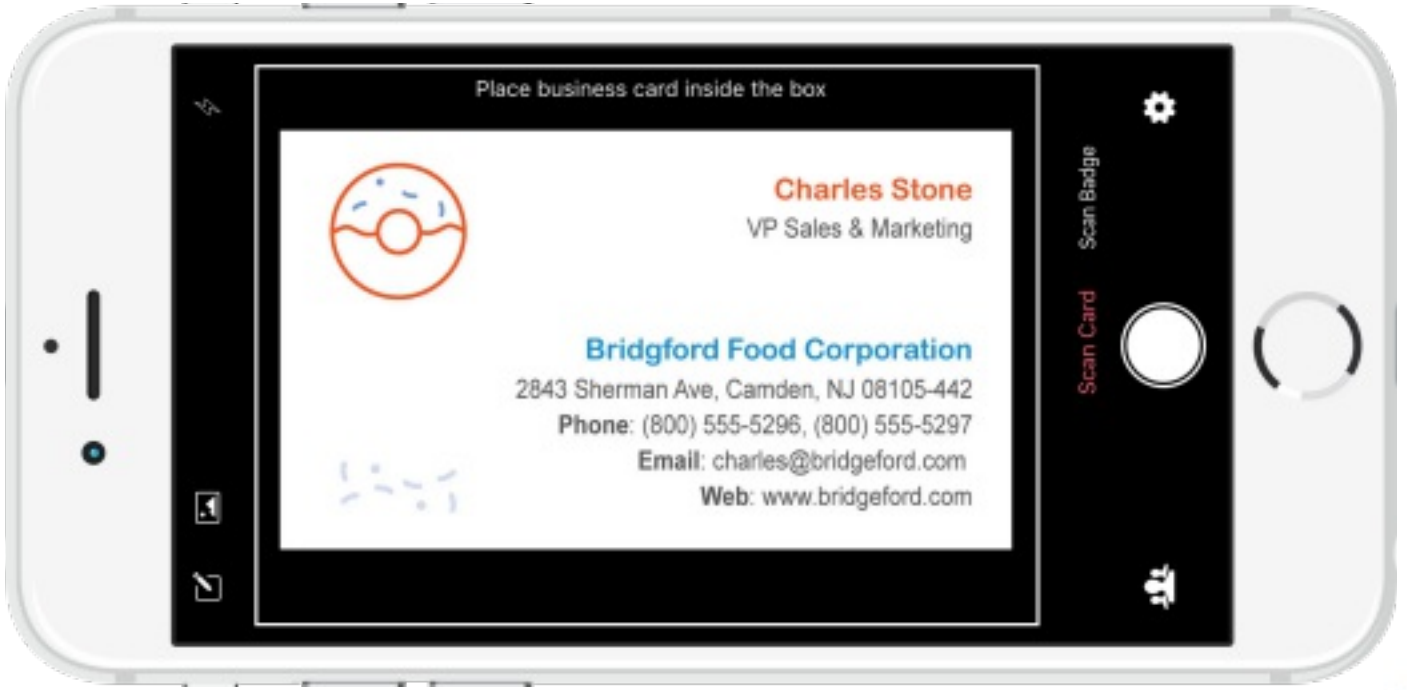
Know which leads come from Adwords.

Quickly find the Ads that give you the best ROI.



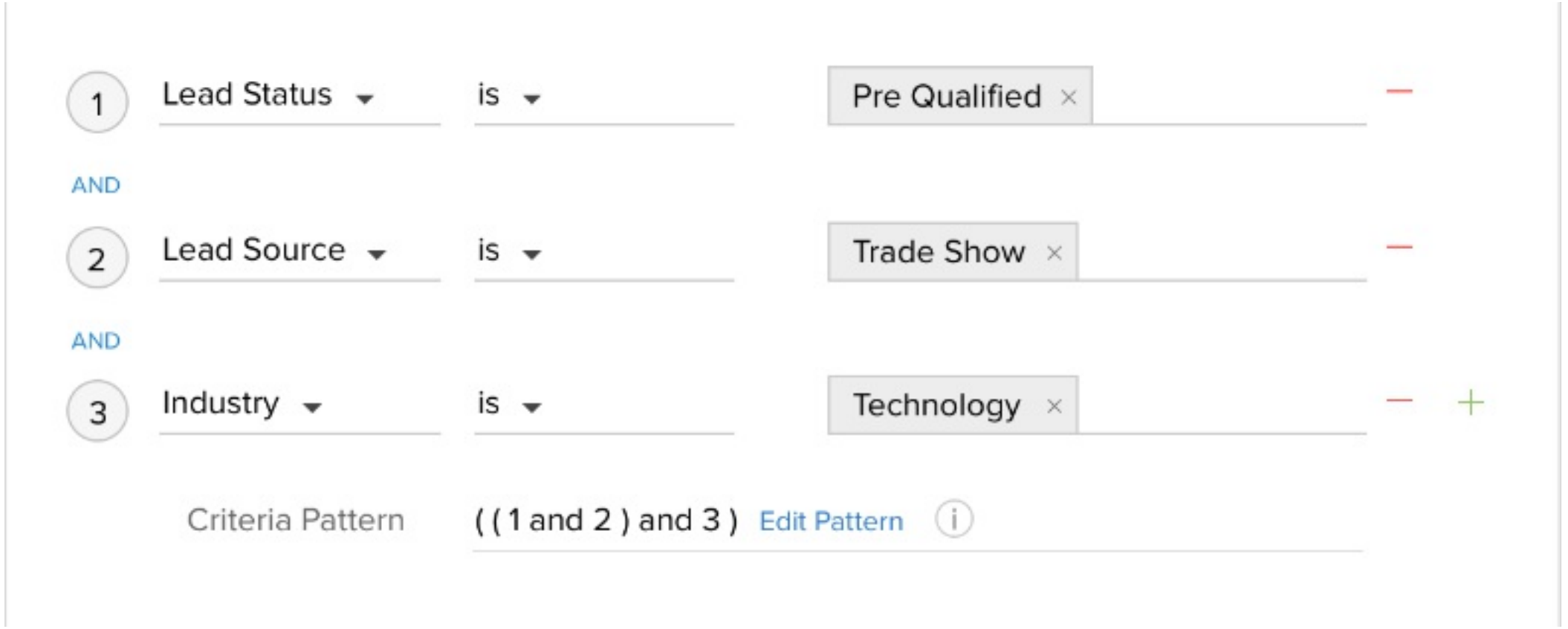
Tradeshow

Quickly scan the business cards to get them inside CRM.



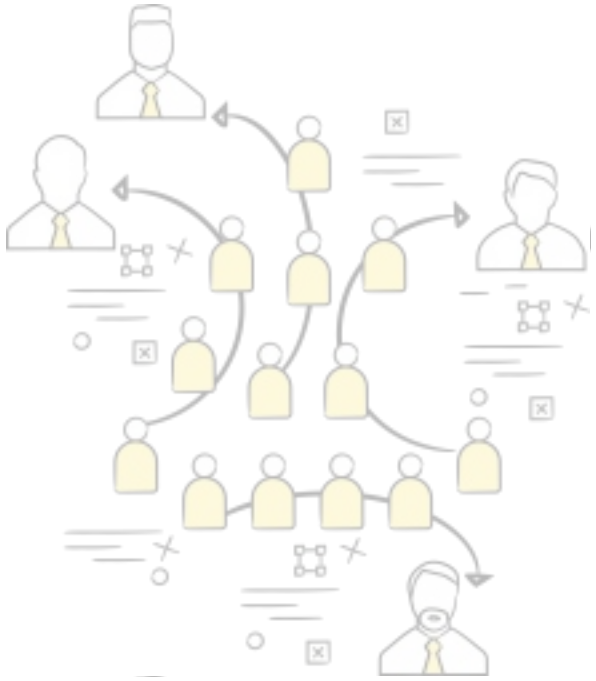
Your leads are in, what's next?

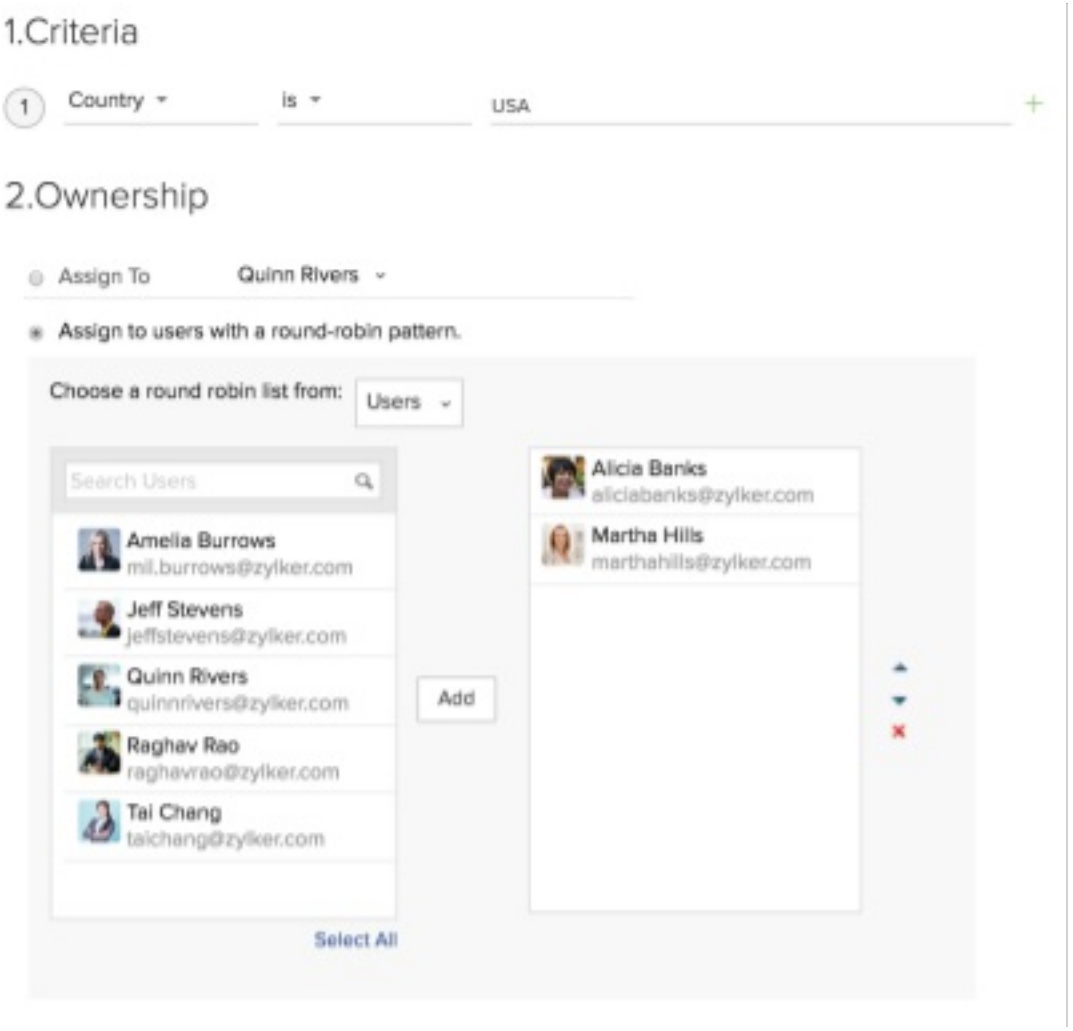
Prioritize leads with Scoring rules



Distribute leads with Assignment rules

Define rules to assign the leads to right owners.

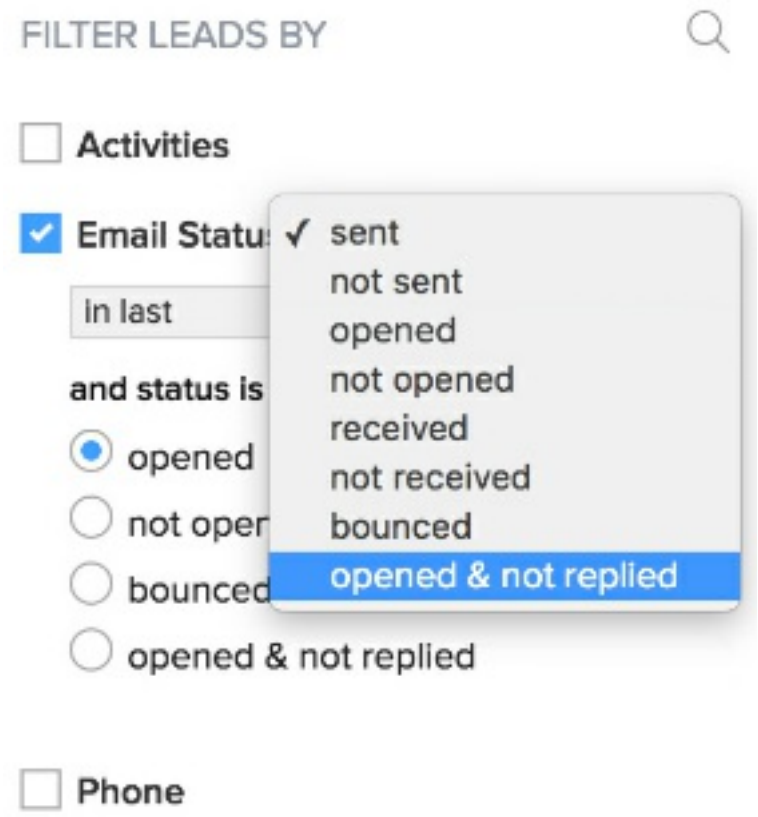




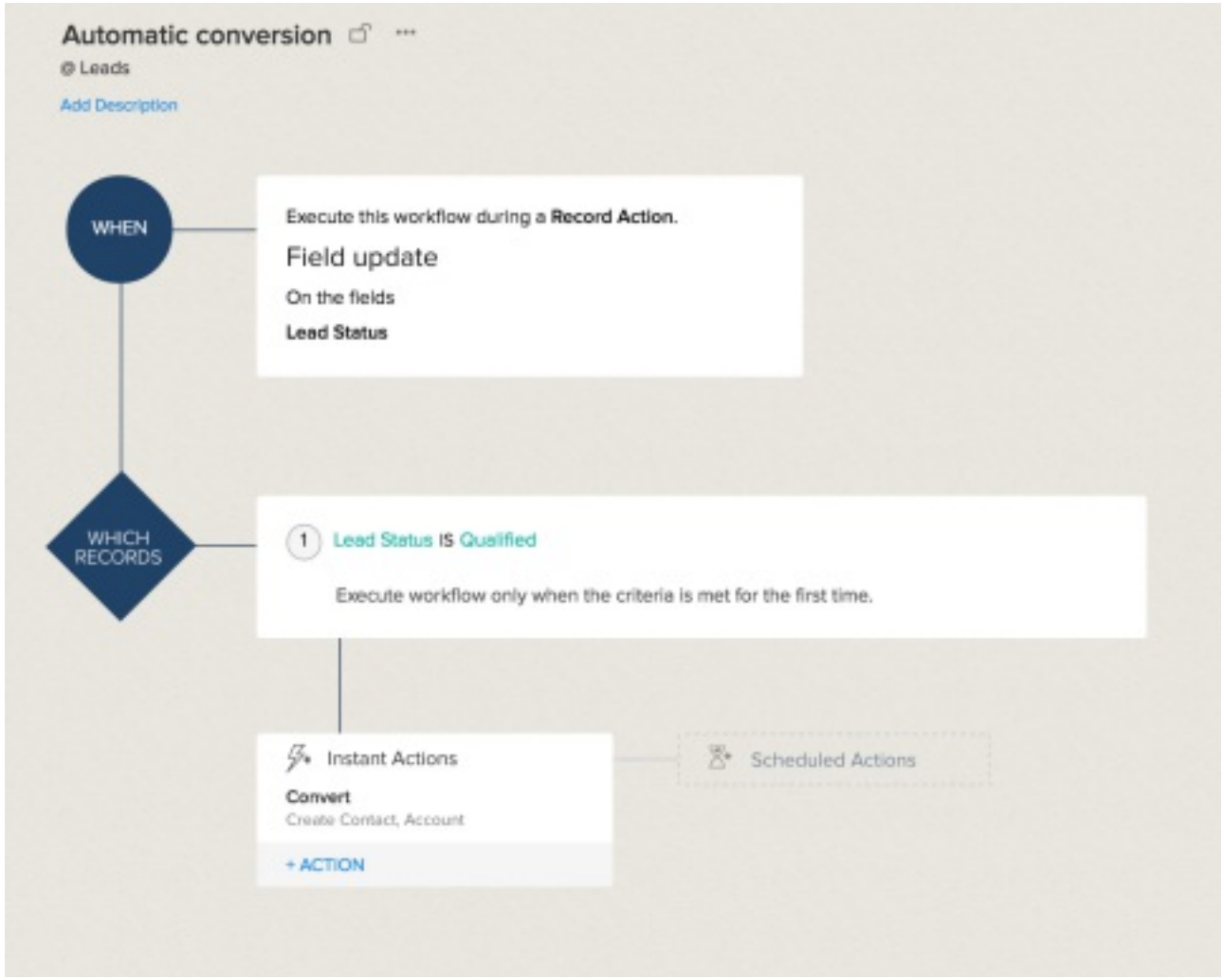
Filter with Custom views & Advanced Filters

Quickly find leads that need immediate attention

One without notes in last 30 days or deals without having a open task.



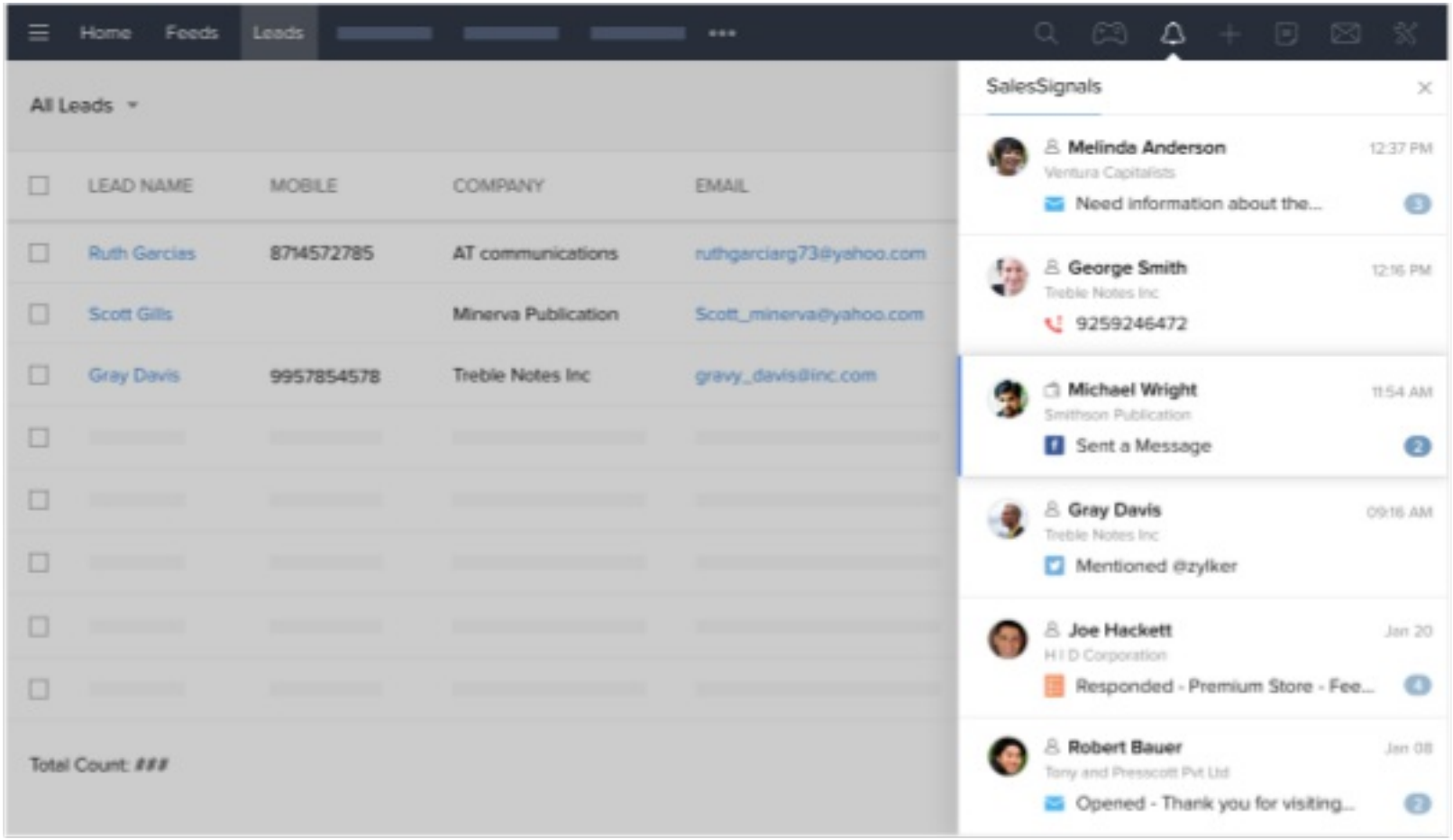
Nurture leads with Workflows



- Automate lead follow up using workflow rules.
- Set up drip campaigns to nurture and qualify leads.

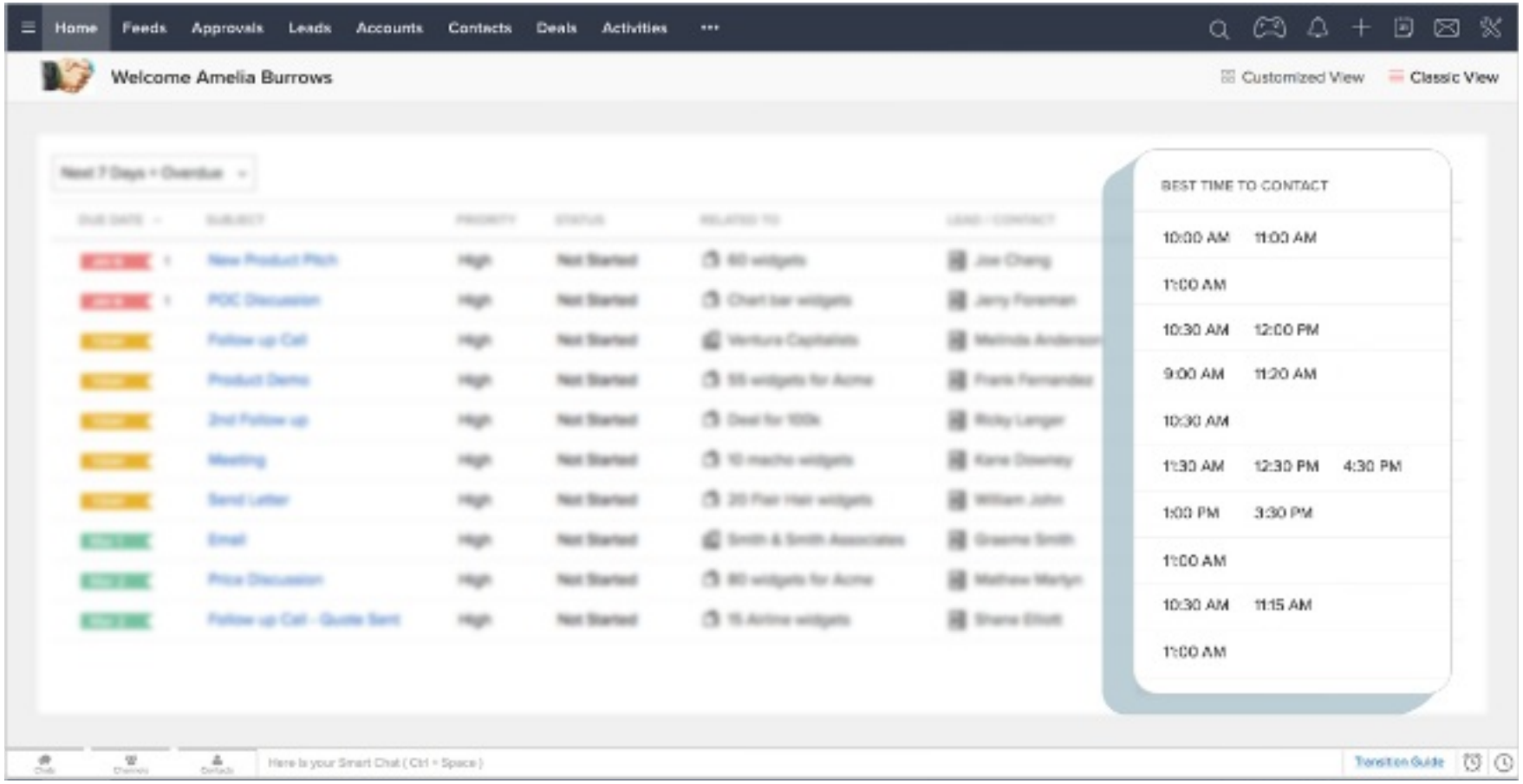
Follow up in realtime with SalesSignals

Realtime notifications based on customer action from:
Email, Call, Chat, Survey response, Support ticket, Social interaction.



Follow up at the right time with Zia

Suggests the best time to reach your contacts.
Auto suggests Macros for recurring actions.

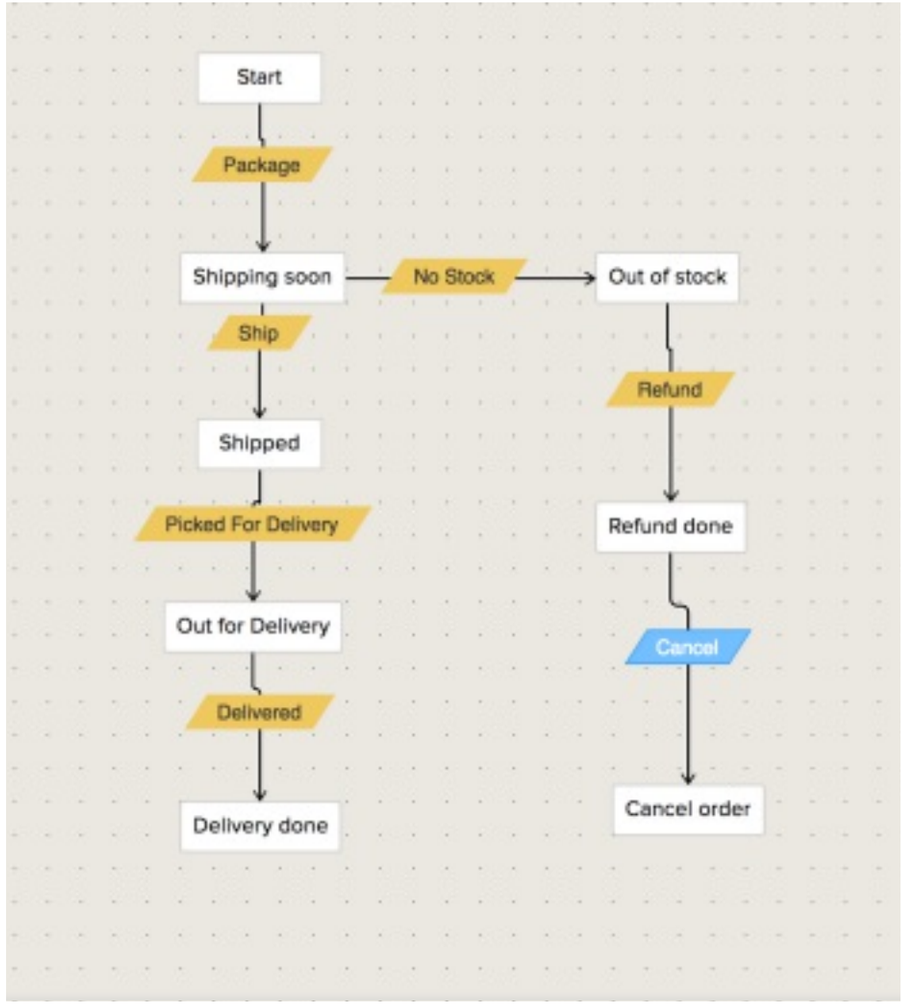


Streamline your follow ups with Blueprint

Process automation for the masses:
Build. Sell. Repeat.

Define & control processes from beginning to end.

Easy-to-use visual process builder.



Analyze your sales performance

Reports

Dashboards

Trend Analysis (Zia)

Is your **CRM in tune with your business?**

Tailor your CRM to your needs with

Custom Fields

Email Templates

Custom Modules

Custom Related lists

Page Layouts

Custom Buttons

Data Security

Zoho CRM Security features:

- Role-based permissions
- Profile and field level access
- Audit logs
- IP restrictions
- Application-level security
- Password policies
- Data protection & backup
- Two-factor authentication
- Complies with SafeHarbor
- SOC 2 Certified

Zoho Data Center Security:

- 7x24x365 security
- Video monitoring
- Biometric & two-factor authentication for entry
- Bullet-resistant walls
- Data encryption
- Data Centers in US and EU

Zoho's Network Security:

- Firewalls
- Intrusion detection and prevention systems
- Anti-virus systems
- Anti-spam systems

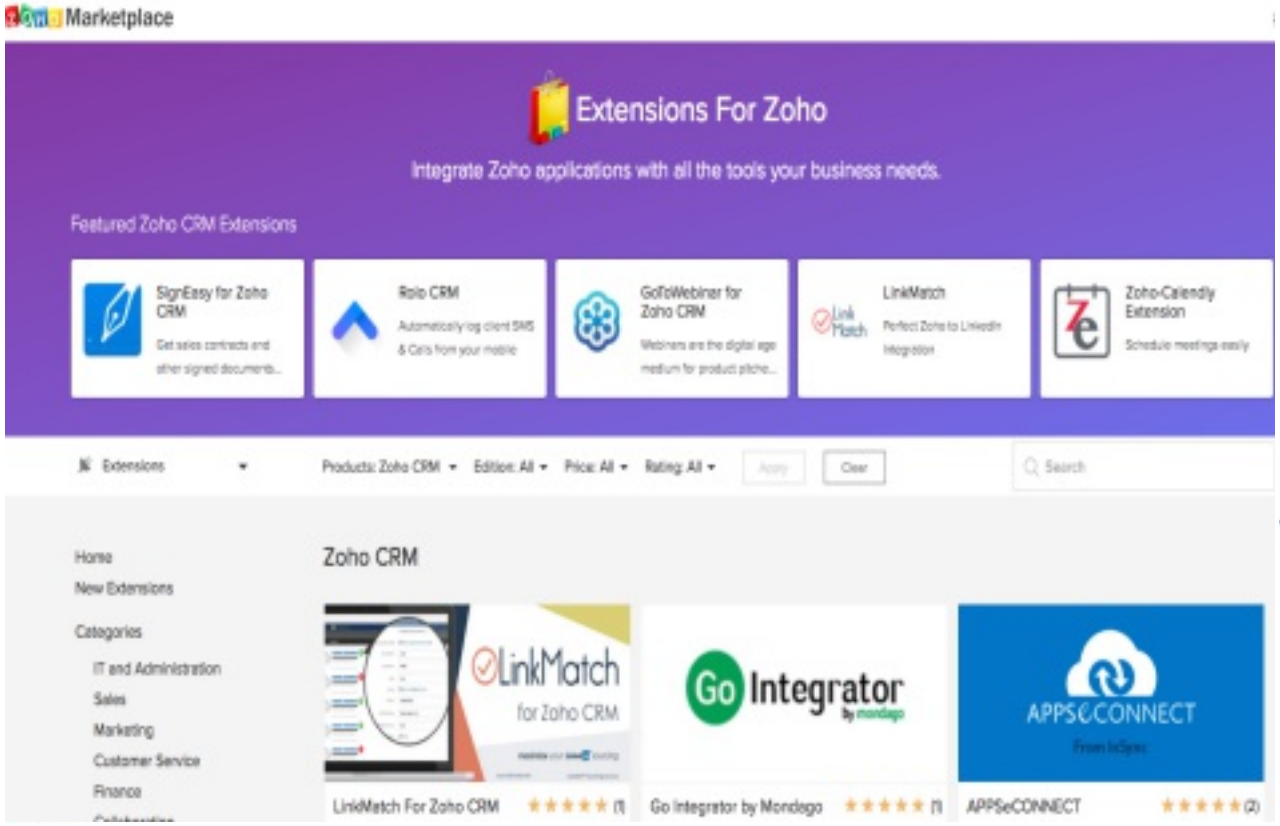
Extend using Marketplace

Integrate Zoho CRM with other apps like

- Mailchimp
- Zendesk
- Box
- Slack
- Microsoft 365
- Google Apps

Visit here to know more:

https://marketplace.zoho.com/



Developer and API

- Catalyst
- REST API
- Widgets
- Developer Edition
- Serverless code
- Web SDK’s
- Mobile SDK’s
- White Labeled Solutions

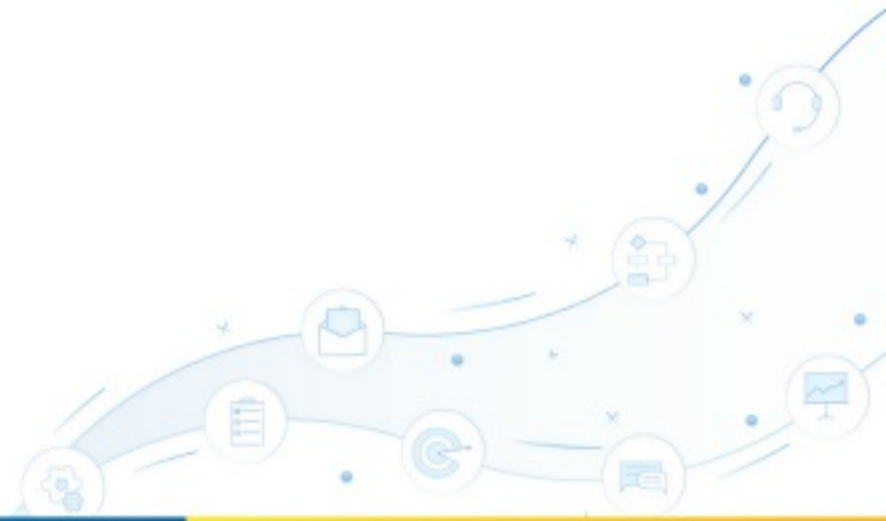
ZOHO CRM

#ZohoCRM2018

WHAT'S NEW?

This release includes:

- Artificial Intelligence
- Customization
- Enterprise Features



Zia is now smarter

- Conversion Prediction (Lead/Deal prediction)
- Best time to contact reminder
- Zia Voice
- Analytics (renaming Dashboards)
- Workflow analysis
- Email sentiment
- Data Enrichment

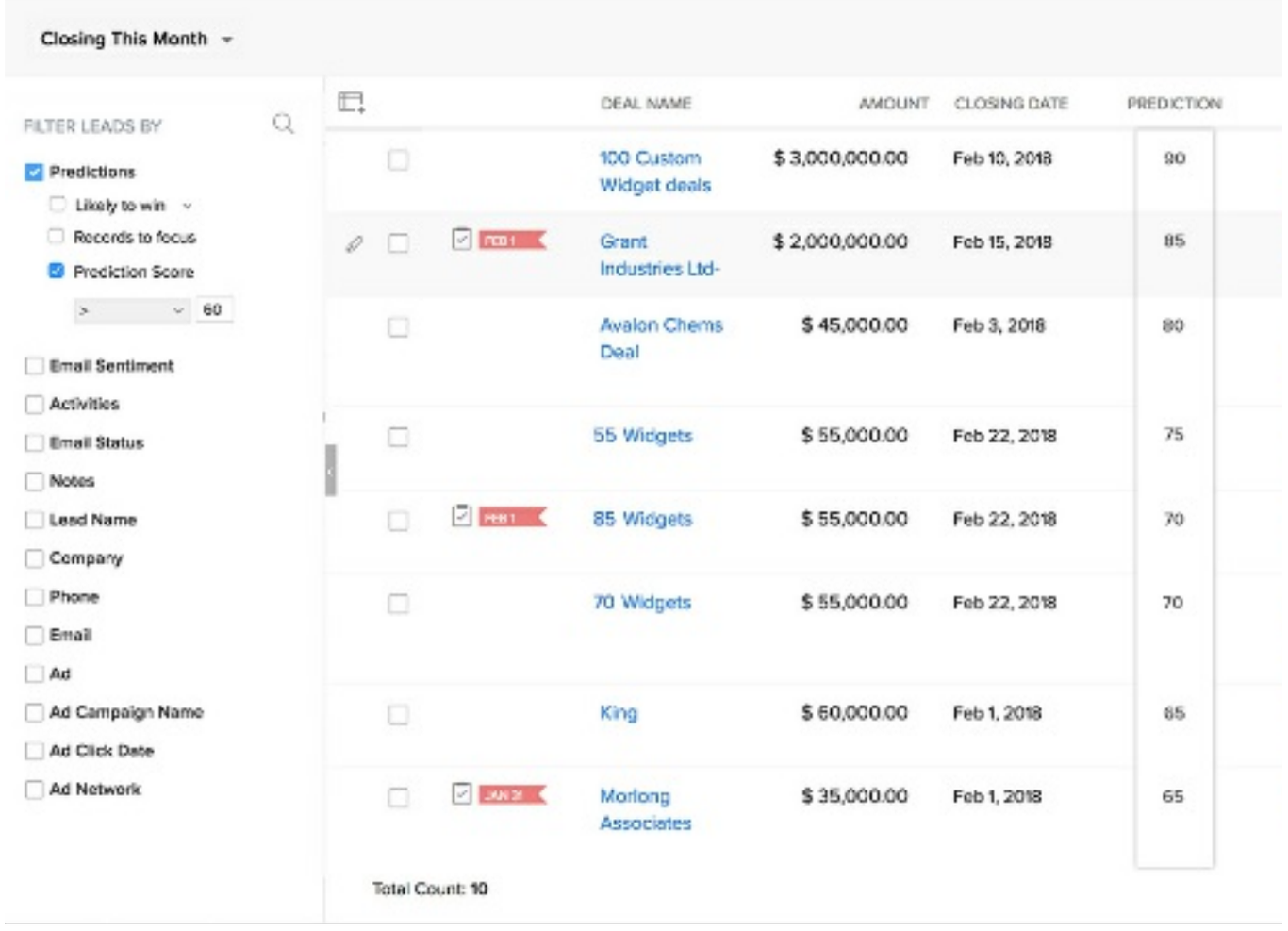
Zia Voice

How does this work:

- Basic CRM information is directly accessed by Zia.
- For advanced business cases, create intents, map variables to those intents, create code in Deluge that does the requested action and then format the response.
- Add new notes or update record status.

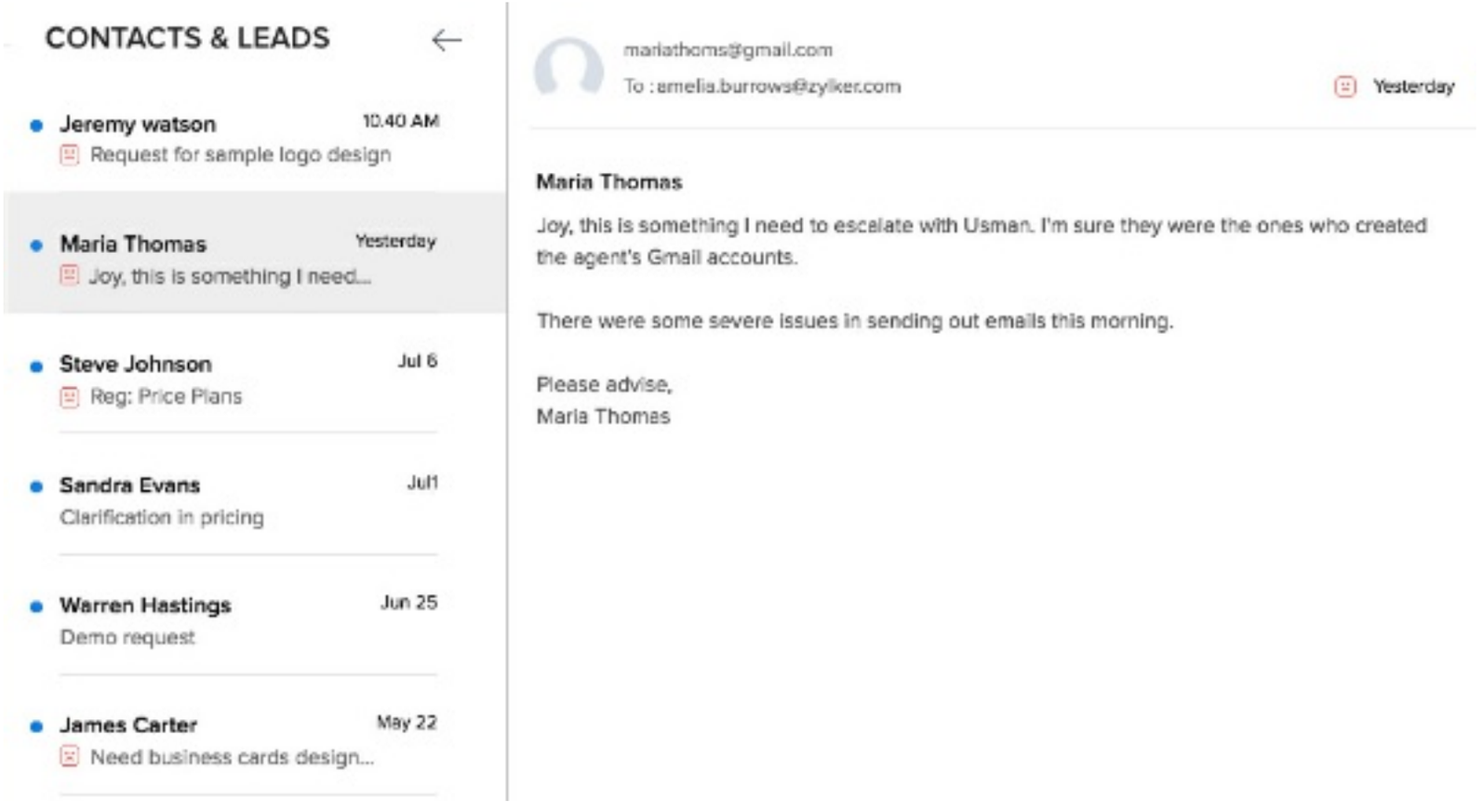
Conversion prediction

Based on your lead or deal attributes and activities along with your win history, Zia predicts the probability of closure on a scale of 0 to 100.



Email sentiment

Zia can analyze or detect sentiment of each email as positive, negative or neutral. (English only right now)



Reminder for the best time to contact

My Today + Overdue Tasks ⌄ Let Zia remind you

SEP 26	149	demo	Not Started	High			Kris Marrier
SEP 15	160	Register for upcoming CRM Webinars	Not Started	Low		King	Kris Marrier
SEP 13	162	Competitor Comparison Document	Not Started	Highest		Feltz Printing Service	Capla Paprocki
SEP 14	161	Get Apporval from Manager	Not Started	Low		Chapman	Simona Morasca
SEP 16	159	Get Approval from Manager	In Progress	Normal		Commercial Press	Leota Dilliard
SEP 16	159	Get Apporval from Manager	In Progress	High		King	Kris Marrier
SEP 18	157	Register for upcoming CRM Webinars	In Progress	Normal		Cheryl Haroldson	
SEP 17	158	Refer CRM Videos	In Progress	High		Truhlar And Truhlar Attys	Sage Wieser
SEP 16	159	Customize CRM to your needs	In Progress	Normal		Benton	John Butt
SEP 17	158	Complete CRM Getting Started steps	In Progress	High		Printing Dimensions	Donette Foller

20 Records Per Page ⌄

New in Customization

Validation rules

Canvas

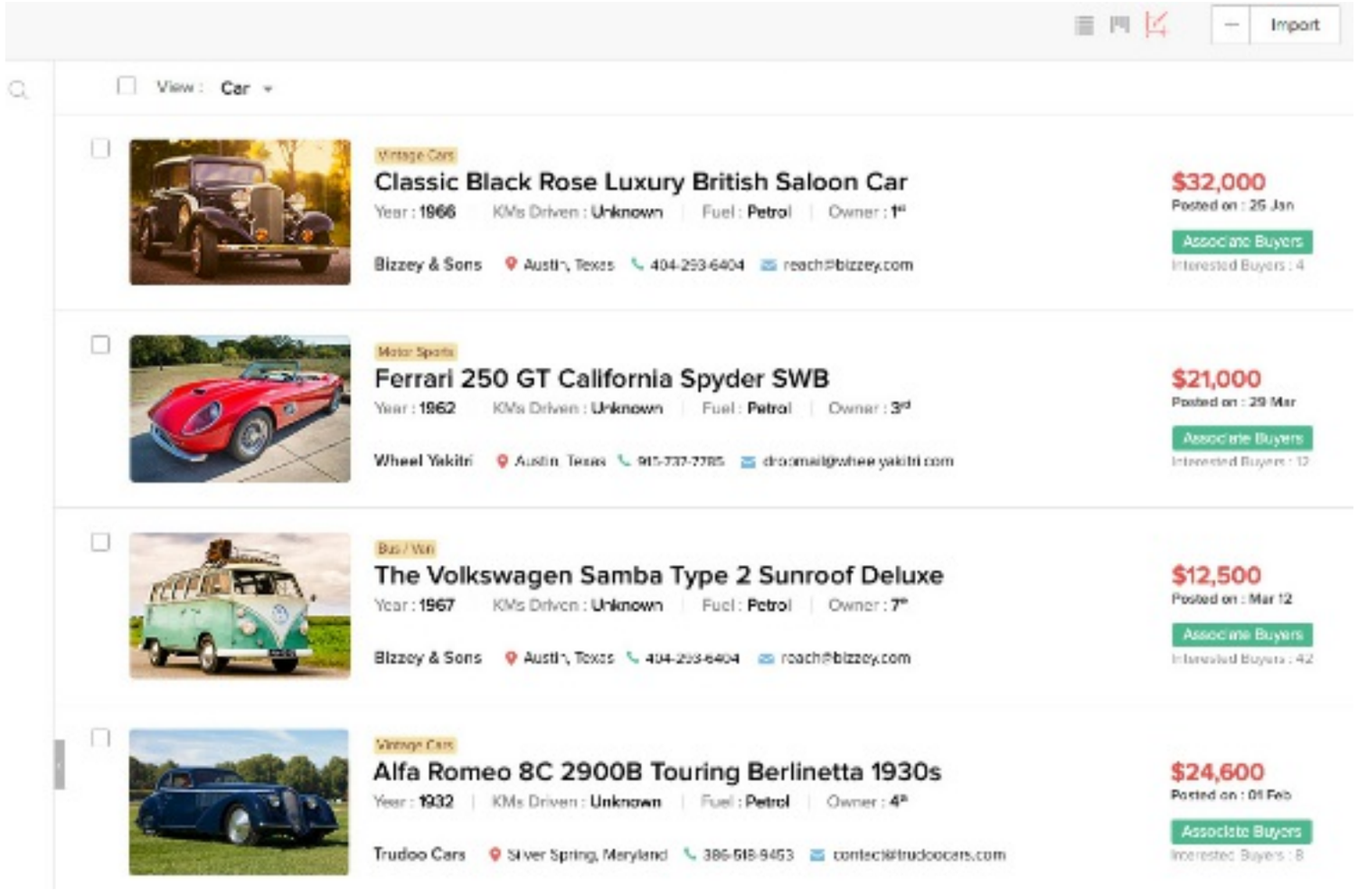
Subforms

Business hours

Multiselect lookup fields

Canvas

Add images for easy identification, use custom buttons or include fields of your choice, and get your view completely customized.



Other features and enhancements

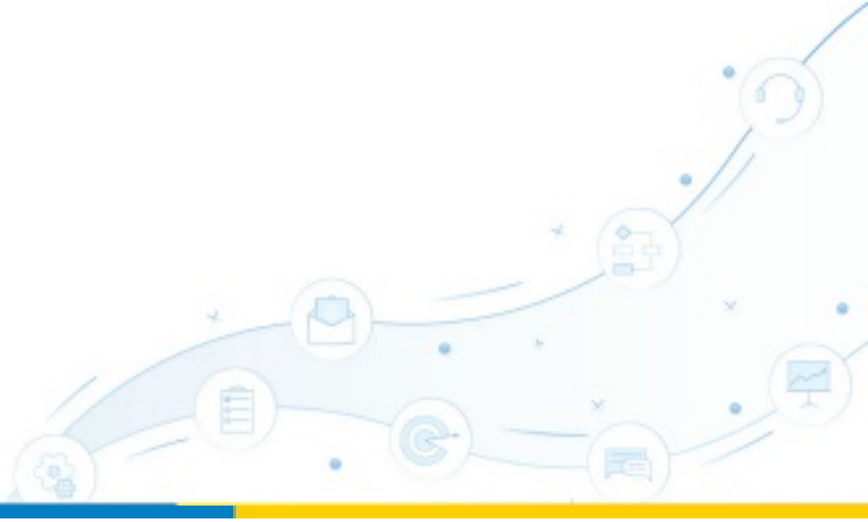
Reporting to hierarchy

Data encryption (EAR)

Interlinking (multi-lookup fields

Sandbox 2.0

Record level sharing



Enterprise Essentials

Portals

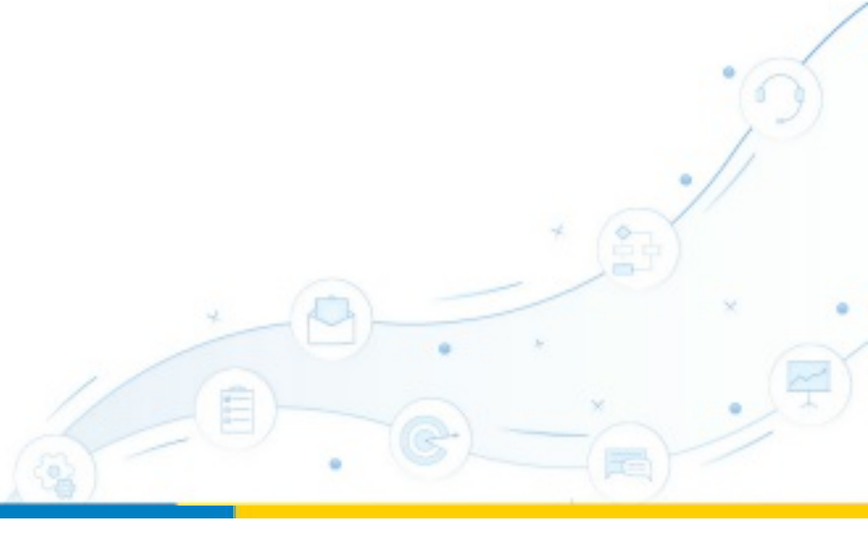
Translations

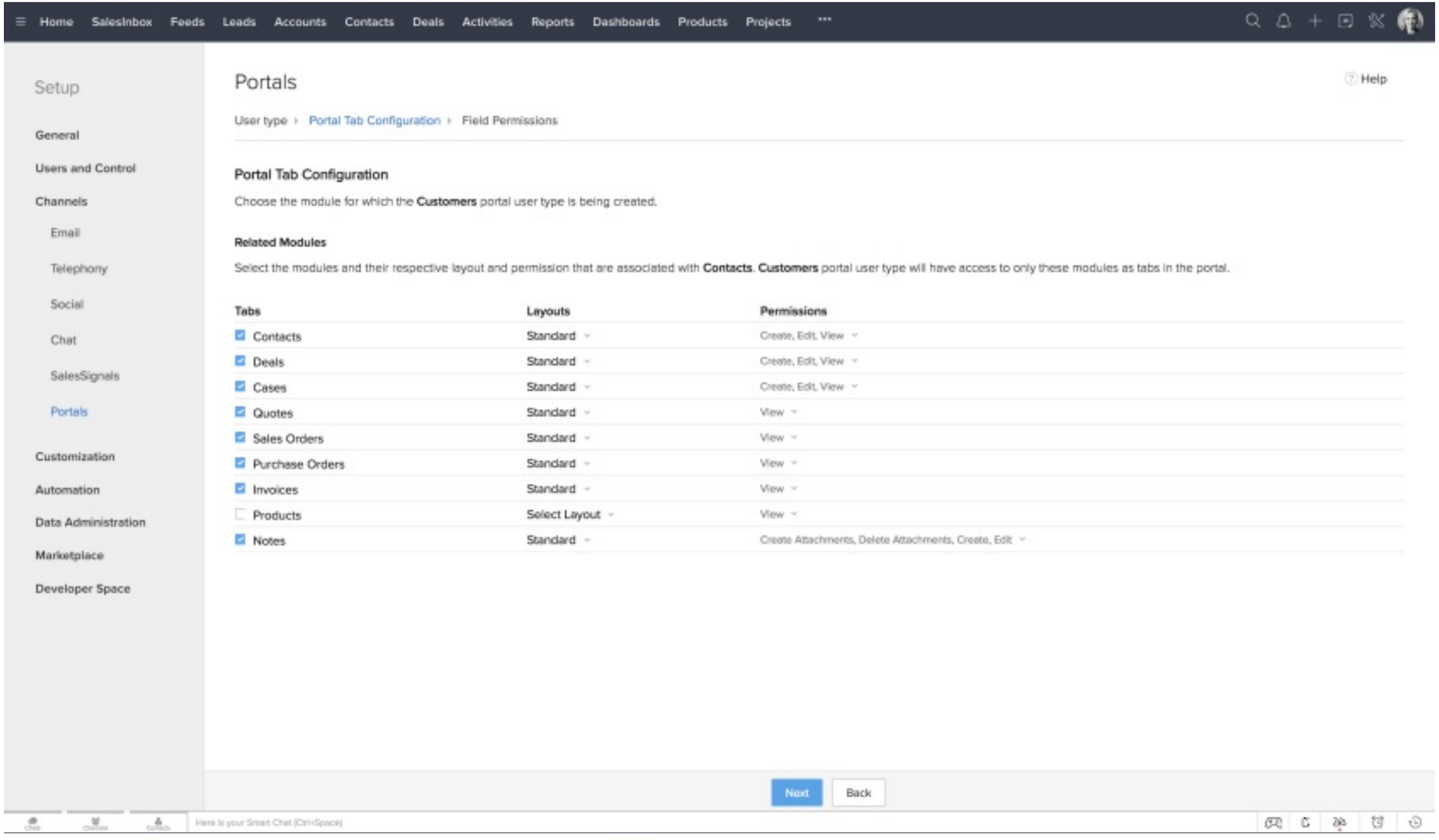
Blueprint 2.0

Portals

Examples:

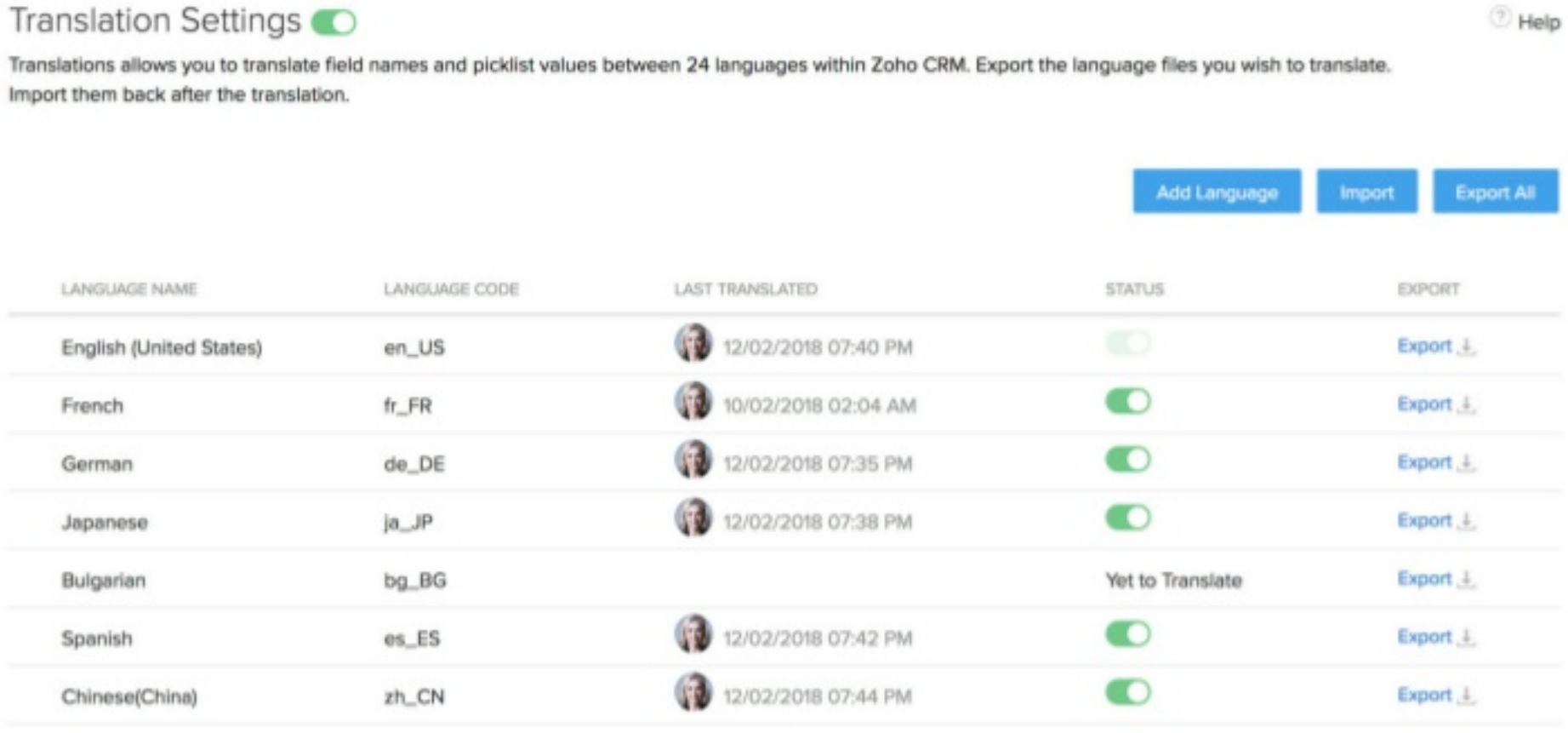
- Job Card for an auto-garage CRM
- Placing Food order
- Students portal for Universities




Home
SalesInbox
Feeds
Leads
Accounts
Contacts
Deals
Activities
Reports
Dashboards
Products
Projects
Setup
General
Users and Control
Channels
Email
Telephony
Social
Chat
SalesSignals
Portals
Customization
Automation
Data Administration
Marketplace
Developer Space
Portals
Help
User type
Portal Tab Configuration
Field Permissions
Portal Tab Configuration
Choose the module for which the Customers portal user type is being created.
Related Modules
Select the modules and their respective layout and permission that are associated with Contacts. Customers portal user type will have access to only these modules as tabs in the portal.
Tabs
Layouts
Permissions
Contacts
Standard
Create, Edit, View
Deals
Standard
Create, Edit, View
Cases
Standard
Create, Edit, View
Quotes
Standard
View
Sales Orders
Standard
View
Purchase Orders
Standard
View
Invoices
Standard
View
Products
Select Layout
View
Notes
Standard
Create Attachments, Delete Attachments, Create, Edit
Next
Back
Here is your Smart Chat (Ctrl+Space)

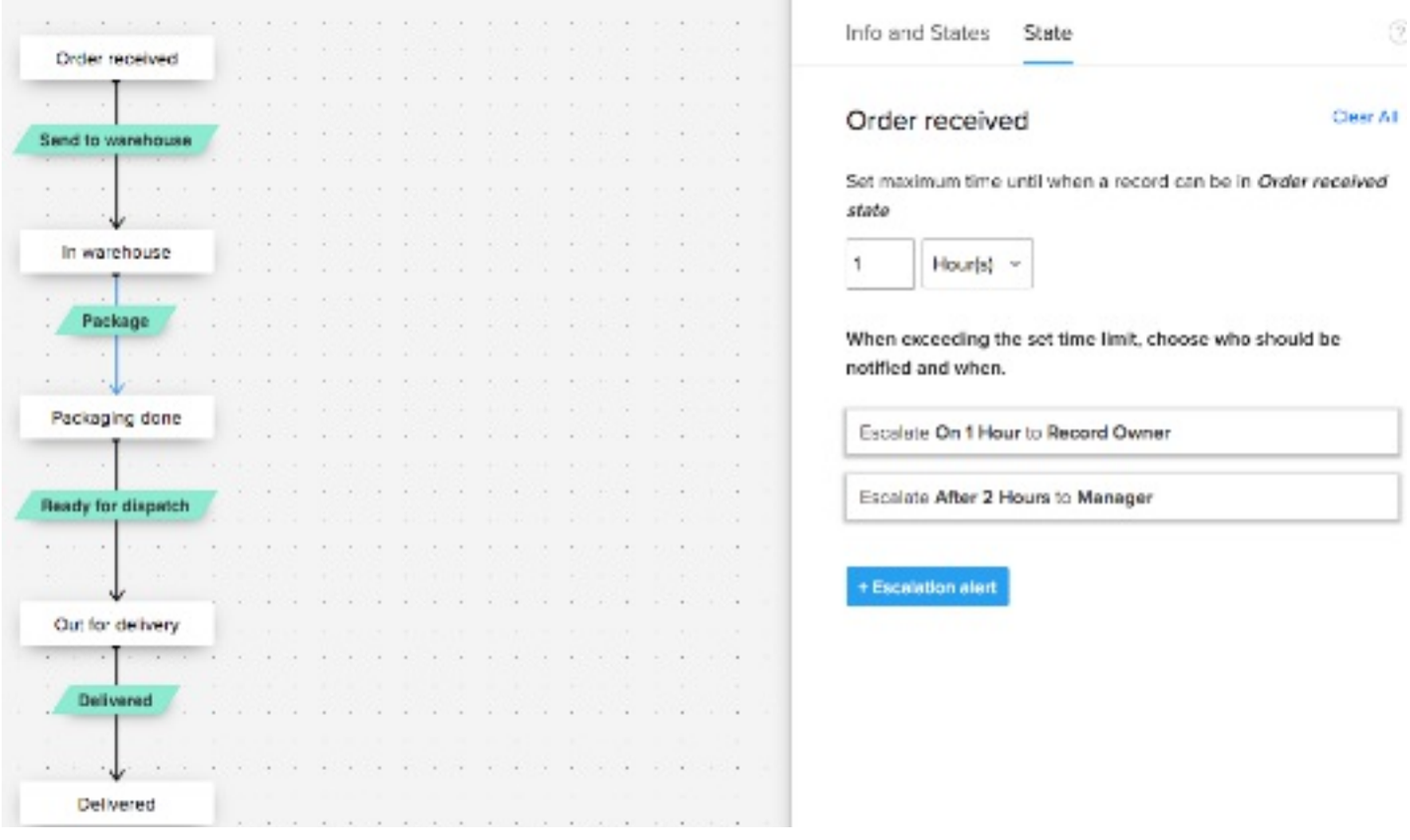
Translations

Export required file, translate it to a specific language, reimport the file to CRM to reflect translation changes.

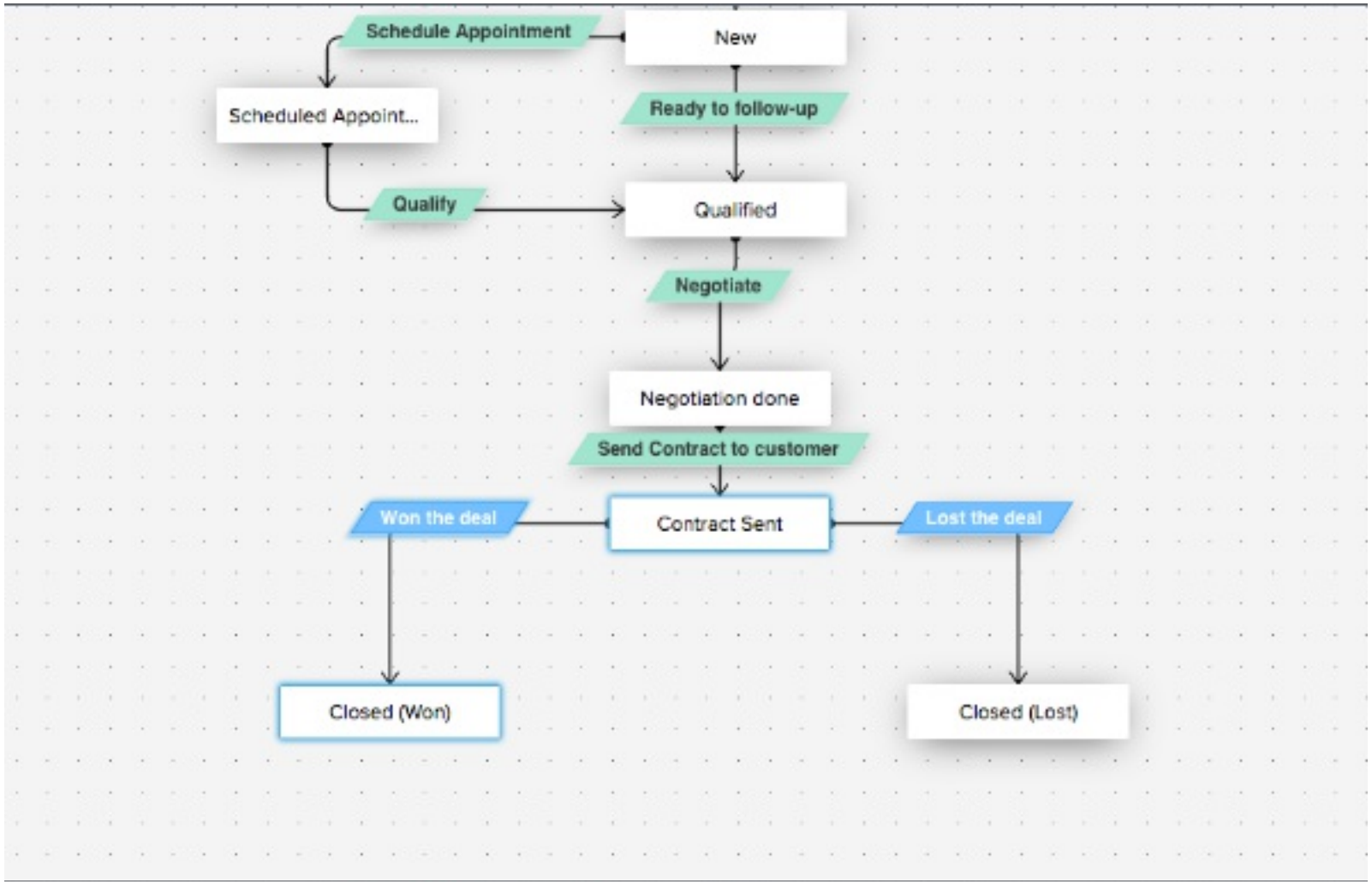


Blueprint enhancements

- Multiple Common Transitions
- Creating related items - During
- Checklist
- SLA
- Parent field update - During

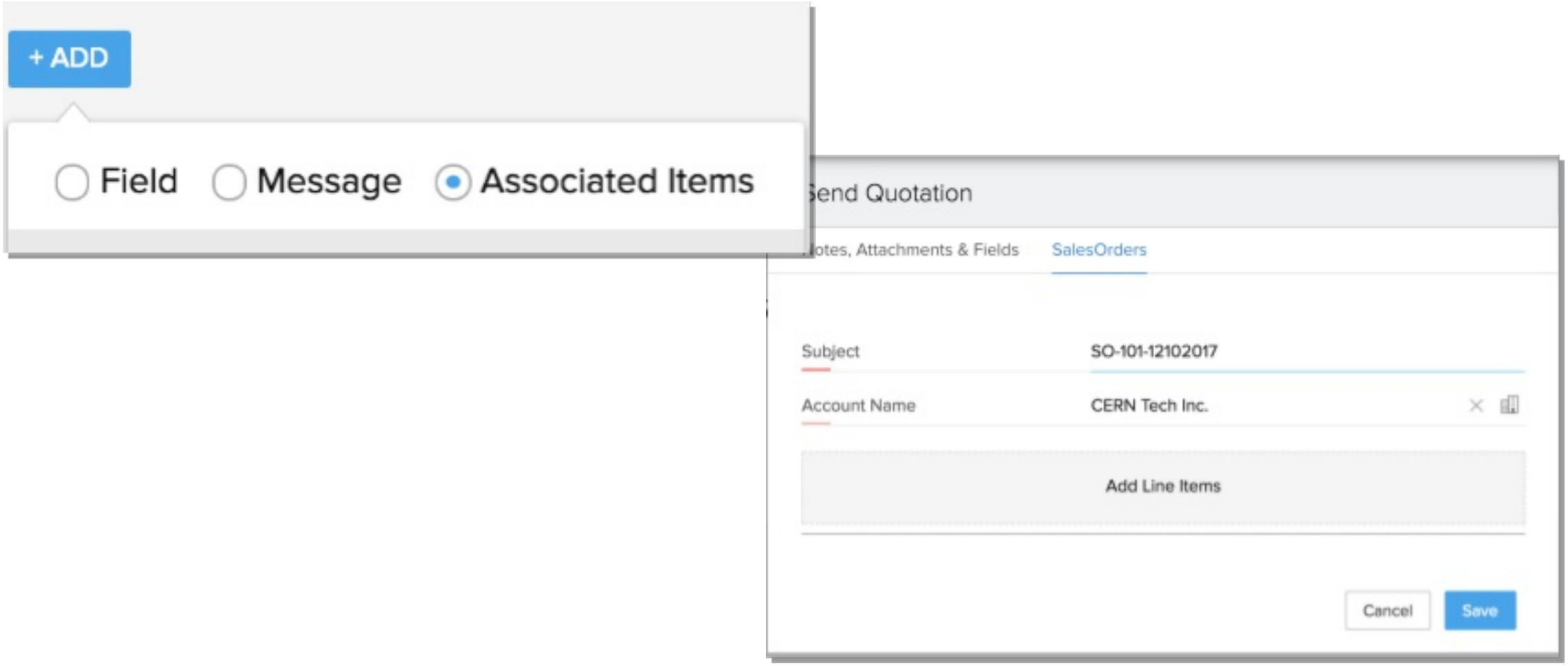


Blueprint:
Multiple Transitions

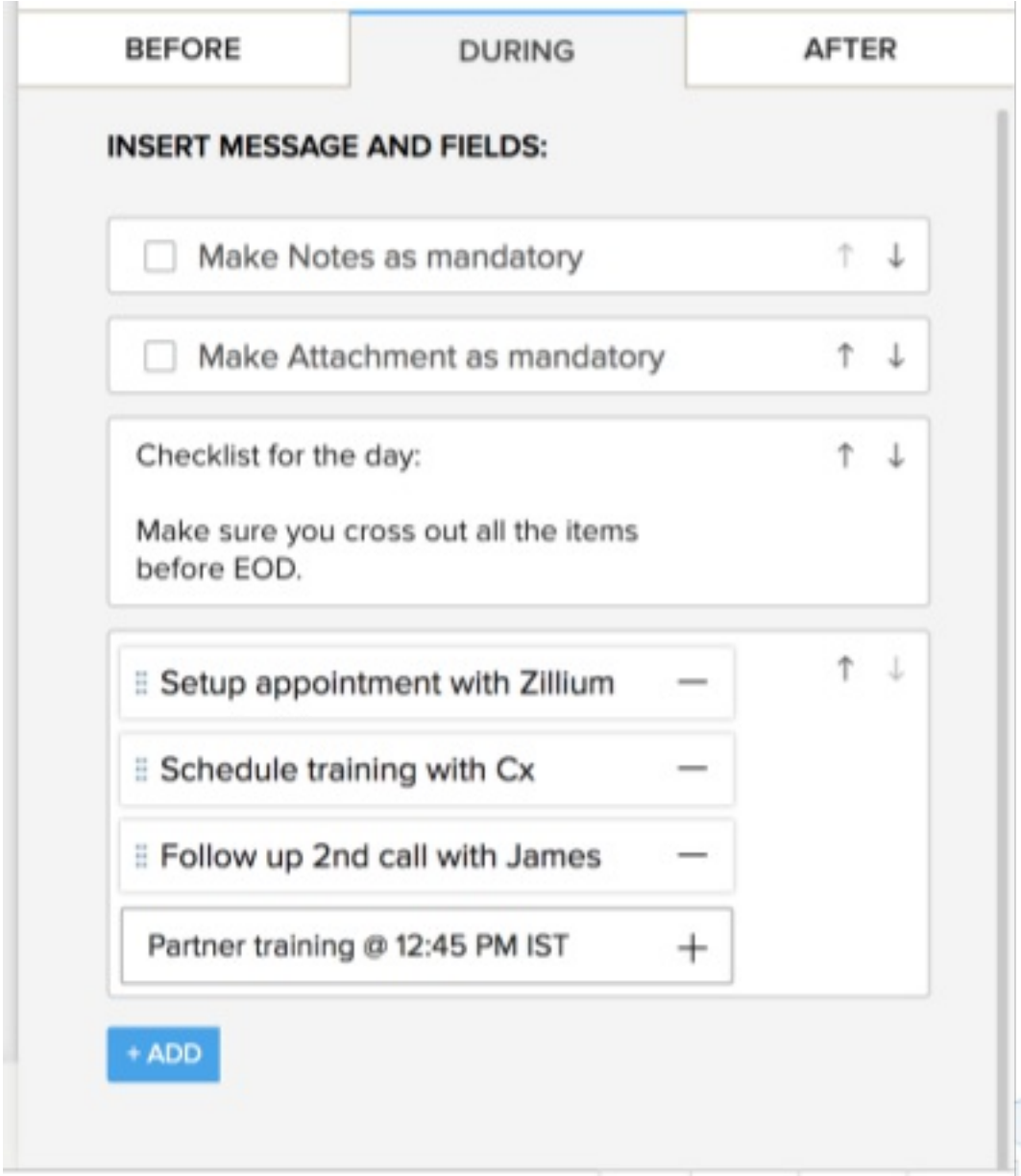


Blueprint:

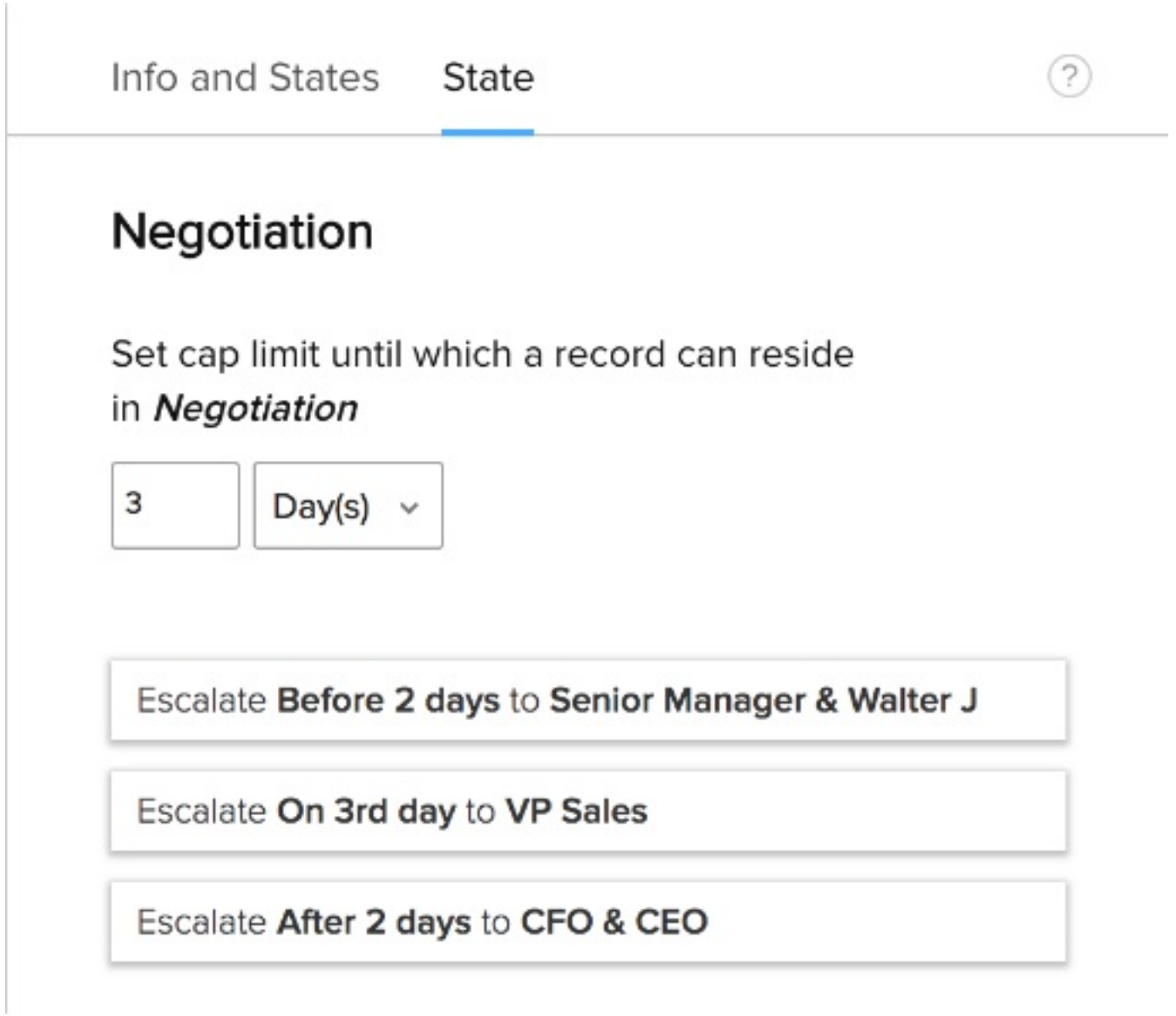
Related Items Creation - During Transition



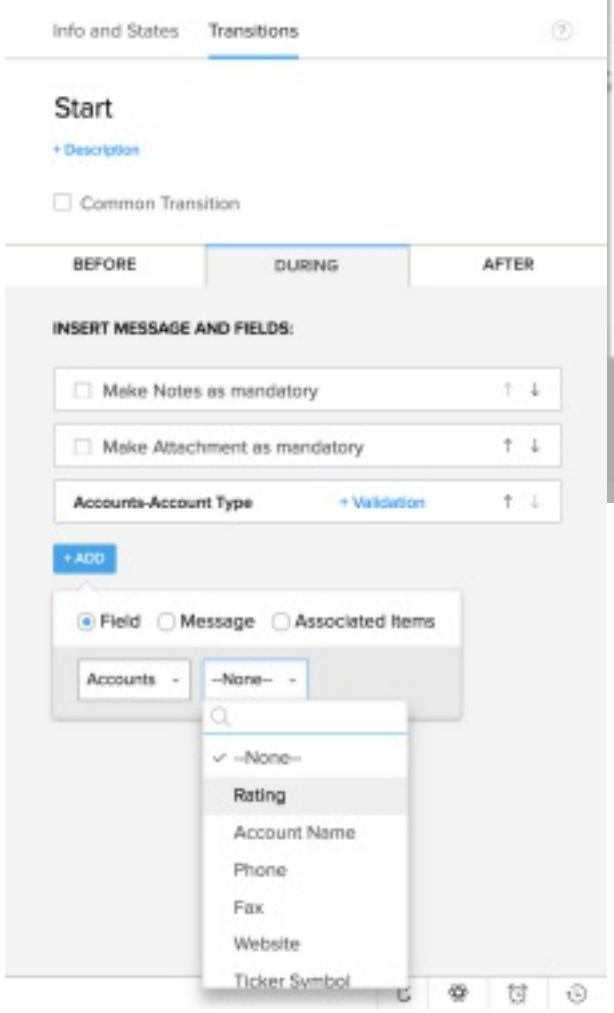
Blueprint:
Check List

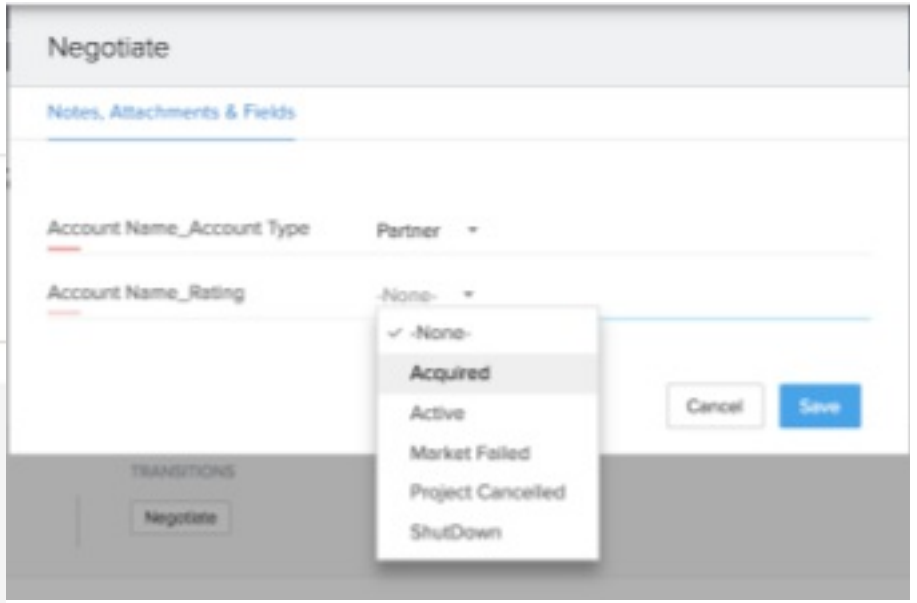


Blue Print:
SLA



Blueprint:
Cross Module Support

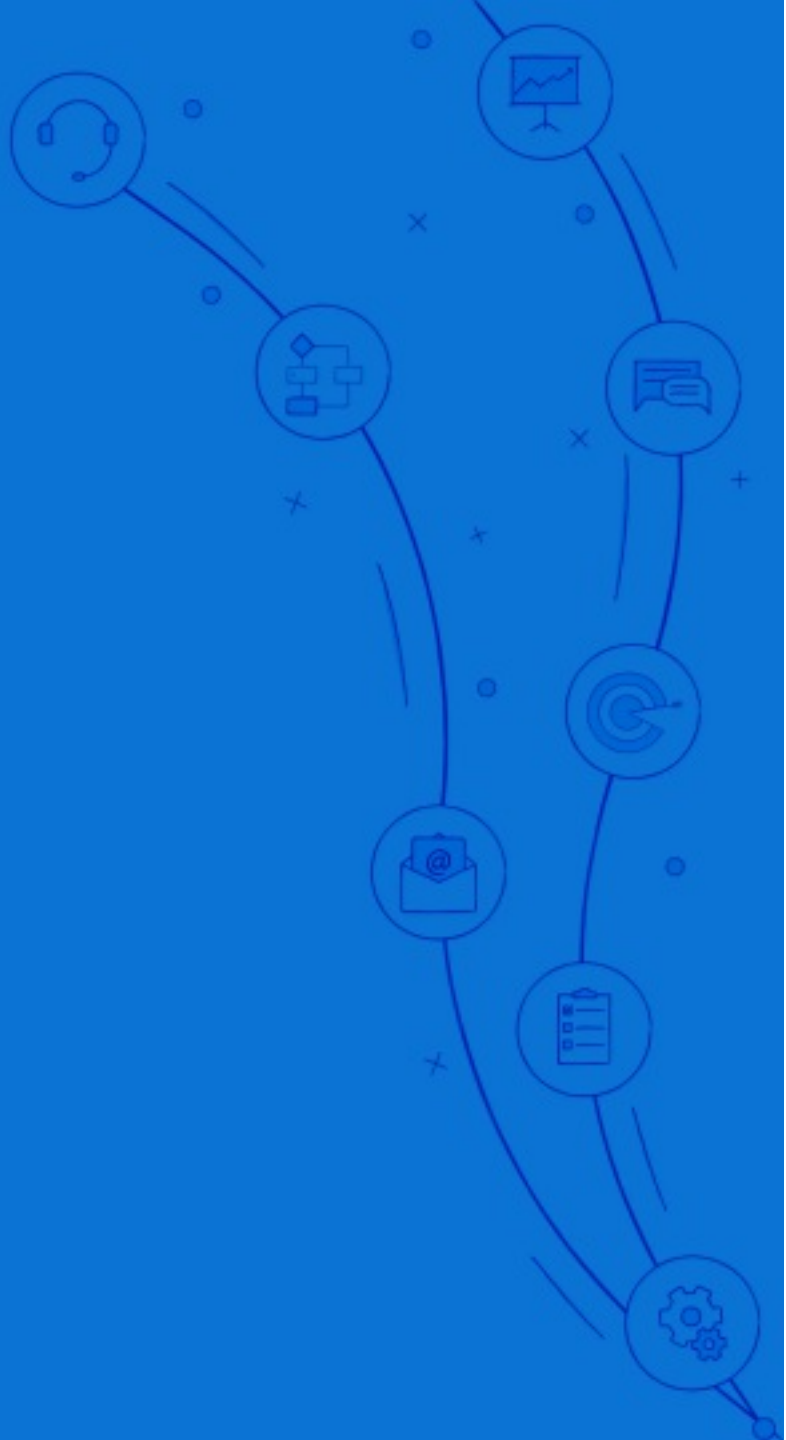




All set?

Sit back. Relax. Analyze and Act.

THANK YOU



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