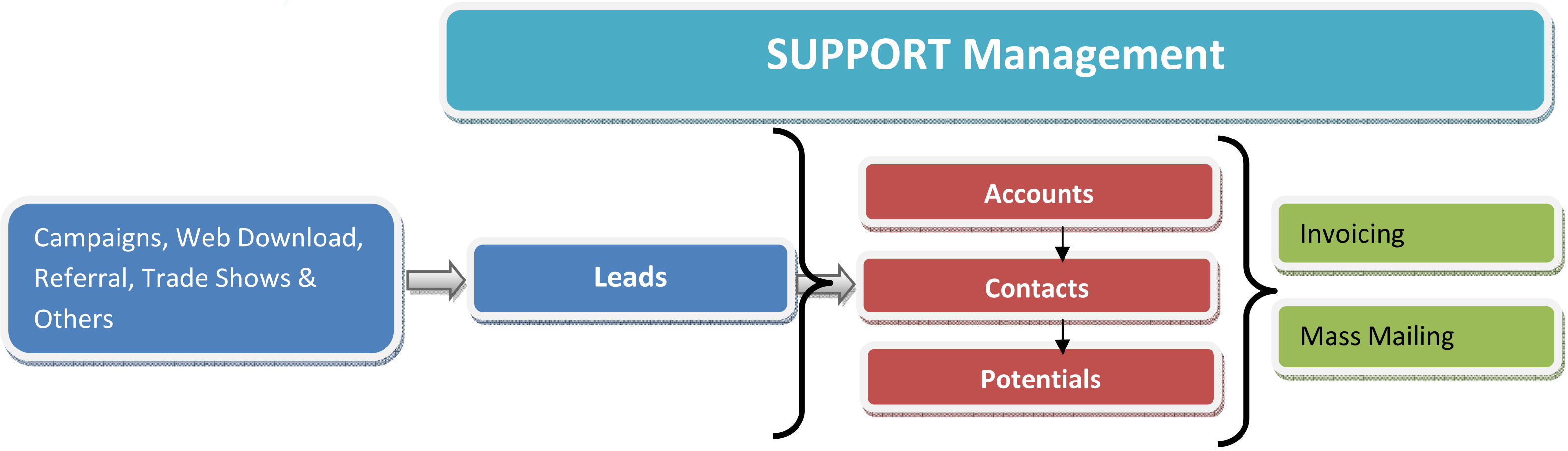

PRE SALES

ACTIVE SALES

POST SALES

Lead Capture

Capture directly from Online Forms
Import through .xls & .csv format
Manual Entry

Work with leads

Check the daily Leads assigned
Call, change the status & generate price quotes
Create follow up tasks

Lead Capture → Assign Leads → Work with Leads → Convert Leads → Sales Prospecting

Assign Leads

Import Leads through Leads Assignment Rules
Enter Leads manually
Check for duplicates
Check current customer

Sales Prospecting

Approval, budgeting & agreement
Decision maker & Price negotiation
Closed Won & Lost to competition/technical

Convert Leads

Qualify leads with simple questions
Need for product or service
Current pain
Schedule demo
Opportunity Size
Time line to implement

Close Won

Active customer
Invoice the customer
Do mass mailing for new updates & future opportunities
Upsell & cross selling opportunities

WIN

NO → Follow up in future

YES → Invoicing → Upsell & Cross Selling Opportunities

Lost Customers

Schedule campaign
Regenerate interest

Follow up in future

<u>Sales Process Diagram and how Zoho CRM helps you to work closely with your customers and keep them happy all through the sales cycle</u>

Welcome to Zoho CRM, web-based Customer Relationship Management software for managing your customer relations in a better way. You can use Zoho CRM software for your organization-wide sales, marketing, customer support, and inventory functions.

Businesses consider Lead management as one of the important activities in their organization-wide sales & marketing process. Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements, purchasing from external sources, and other marketing campaigns. These are used to qualify a particular individual or organization to next stage of your sales process so that you can sell your products/services to them in future. Sometimes leads may not be interested to purchase specific products/services, but may be useful as referral to sell other products in future.

The terminology related to lead management may differ across the industries, but the basic process is almost the same. You can use *Leads* module, if you have a well-defined lead management process in your organization. In the Zoho CRM system, lead contains a combination of company, person, and business opportunely (potential) details. You can use Zoho CRM for managing both **Business to Business** (B2B) and **Business to Consumer** (B2C) scenarios. In B2B scenario company name can be made mandatory where as in B2C company name can be optional.

Lead Management:

Lead Capture

There are number of ways to generate leads, such as Marketing Campaigns, Trade Shows, Online Form, Referrals, Direct Mailers, Search Engines, etc. Zoho CRM helps you capture all these data with an easy to use “Web to Lead” or “Import” feature. If you would like to capture leads directly from your website, use the feature “Web to Lead” and all the leads will be automatically captured in Zoho CRM. Also, you can use “Import” feature to mass upload the data through .xls or .csv formats

Lead Assignment:

You can setup lead assignment rules based on your organization-wide lead distribution (based on sales territories) process so that leads generated through import tool or web to lead form are automatically assigned to the respective sales team members.

Lead Custom Fields

Your Administrator can create additional custom fields or remove fields that suites your organization sales process. You can also change the Lead Page Layout based on your requirements. Visit our setup wizard to check out this functionality. The existing pick list values can be changed that would suite your organization.

Duplicate Leads:

Duplicate records have to be removed or merged with the existing Leads or Contacts. It would be very embarrassing if you call an existing customer or a contacted lead. Find and Merge leads is available in Zoho CRM for your assistance.

Follow UP:

Every company will have their own follow up process for leads & contacts. Administrator can enable the auto task feature while importing the lead. Set up the subject of the task and the date of task. For all leads, tasks will be automatically generated for the respective owners. As soon as you login, you can see the list of Tasks for that day. In the drop down menu, we have options "over due tasks, last 7 days, open tasks, next 7 days, etc". You can set the default as "Open + Overdue Tasks". Soon you complete the task, based on the call or e-mail, you can set up a follow up task.

Lead Qualification:

Now, its time for sales people to work with assigned Leads. Everyday they login, look at the newly assigned leads and start making calls & send e-mails. Based on your business process, sales rep will qualify the lead and change the status accordingly. The normal status that many organizations would use is Cold, Warm & Hot.

Converting Leads:

Once a Lead is qualified it will be converted to an opportunity with an associated contact & account. Zoho CRM helps you to complete this process seamlessly. During your conversion, you can either merge the date to an existing Account or Create a New Account and if the Opportunity should be handed over to another sales rep, e-mail can be triggered to that sales rep for further follow-up.

Archived Leads:

Leads that are cold are consistently followed up the sales person once in a month or quarter. For such leads, Tasks can be created, so that the sales person will not forget to follow up those leads. Or you can mass e-mail such leads to announce your new service or product availability to create interest.

Active Sales:

Once a Lead is converted to an Account, Contact & Opportunity, the lead is termed as "Prospects" or "Qualified Leads". The sales rep follows up further with these accounts and tries to close the deals. The Opportunity status fields are mapped to probability of winning the deal. For example, if the Opportunity status remains Cold, the probability for winning the deal will still be 10%. Like that you can map the status with the probability that would suite your organization.

Price Quotes:

Zoho CRM allows you to generate price quotes to your customers. Your Administrator can upload all the products/services, prices, etc into Zoho CRM, so that your sales rep can generate Price quotes on the fly.

You can upload your corporate logo into Zoho CRM, so that it would show up while generating a price quote.

Post Sales:

There are two stages. “Closed Won” & “Closed Lost”. If the status is “Closed Won”, your finance team would need to Invoice the customer for the payment. Zoho CRM helps you to do this very easily. Convert the price quote to a sales order and then to an Invoice. Or your finance team can generate New Invoice to the customer with the product/service details. Payment and other terms & conditions can be defined by your Finance team and make it as a standard template for your organization.

If the status is “Closed Lost”, you can further analyse whether it is due to pricing or technical. Create tasks to follow up these leads or mass e-mail periodically to create interest on your future product/services.

Support:

During the entire sales cycle (Pre, Active & Post), you would definitely answer your leads or customers technical questions. Zoho CRM helps you to create “Cases” and it can be assigned to your sales or support rep for further action. You could also use our “Web to Case” feature to capture the cases that are submitted through a web form.