Zoho CRM

Optimization Plan

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Goal Outline

What We Want CRM To Do For Us

01

Streamlined organization of lead generation/nurturing efforts and deals in pipeline stages

02

Optimize performance of sales with automations to consistently keep track of leads, deals and campaigns

03

Collect and organize data to analyze and adjust strategies according to current performance and goals of company

Mission Outline

Steps to Get CRM to Do What We Want

01

Configure and optimize modules like leads, campaigns and the deal pipeline stages

02

Create automated workflows and blueprints to follow for for leads and deals

03

Set up data collection to be optimized in reports for company's needs and structure how to apply data to future strategies

Action Steps to Optimize CRM

Customize Modules and Fields

Configure modules and fields to streamline organization of leads, accounts, and campaigns

Lead Management

Manage lead generation, qualification, nurturing and more

Deal Stages and Pipeline

Configure deal stages and pipelines reflect our communication and sales process for consistent management

Workflows and Tables

Set up workflows to automatically remind to follow up based on a lead's activity (i.e. visiting specific landing pages)

Blueprints for Structured Processes

Create a game plan with steps to follow when nurturing leads through each stage of deal pipeline

Leverage Analytics and Reports

Set up data collection to be optimized for company's needs, create reports of findings, and apply data to future strategies

Ideal Module Management:

Leads, Deal Pipeline and Campaigns

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Ideal Lead Management

Lead Stages

Stages could include:

- New/Potential
- Contacted
- Qualified

Lead Segmentation

Segmentations can include:

- Industry
- Product Interest
- Source

Lead Qualifications

Zoho can set up clear qualification criteria like:

- Budget
- Authority
- Needs
- Timelines

Lead Scoring

Zoho can set up rules to assign scores to leads based on company’s priorities, contact engagement, etc.

Lead Nurturing Workflows

Set up workflows to automatically remind you to follow up based on a lead’s activity (i.e. visiting specific landing pages)

Blueprints for Consistent Management

Create a game plan with steps for everyone to follow when nurturing leads through each stage of deal pipeline

Ideal Deal Pipeline Part 1

Lead Generation	Lead Qualification	Initial Contact	Presenting	Proposal	Quoting
Identify and attract potential customers	Assess value of potential lead with segmenting, scoring, then qualifying	Establish communication and build rapport: introduce offerings with deck and pricing	Showcase offerings with full-fleshed decks, pricing and samples	Propose specific purchase order based off presentation feedback	Provide quote of price for proposal

*CRM allows idle deal nudge reminders for deals sitting in a pipeline stage for too long

Ideal Deal Pipeline Part 2

Negotiation

Back and forth communication to determine final order and prices

Purchase Order

Purchase order submitted to CRM and Inventory

In Production

Products in production

Shipping

Products shipped

Invoicing

Submitting receipt of sale for payment

Closed

Payment received and deal closed

*CRM allows idle deal nudge reminders for deals sitting in a pipeline stage for too long

Ideal Campaign Management

Set Clear Objectives

All campaigns need SMART goals that further company's mission (outlined in PPT each campaign)

- Lead generation (Expos)
- Customer retention (Accounts)
- Product Promotion (Lines)
- Brand Awareness (Company)
- Revenue Increase (Sales)
- Seasonal Promotions (Holidays/B2S)

Segment Audience:
create targeted lists with criteria like demographics, purchase history, engagement, or status

Leverage Automation for Lead Nurturing

- Set Up Drip Campaigns: Use automation features to set up drip campaigns.
- Trigger-Based Campaigns: automated campaign triggers by specific actions
- Lead Scoring to prioritize leads

Monitor Campaign Performance and Analytics

- Track Key Metrics
- Campaign-Specific Dashboards
- ROI Tracking: Calculate ROI of each campaign by tracking revenue generated

Segment and Retarget Campaigns Based on Behavior

- Retargeting Campaigns: Set up retarget workflows for contacts who engaged but didn't convert
- Use Behavioral Segmentation: Segment audience based on behavior. Send tailored content to re-engage

Conduct Post-Campaign Analysis

- Review Campaign Outcomes
- Implement Continuous Optimization

Optimization of

Workflows, Blueprints and Projects

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Workflow Optimization Steps Part 1

1. **Define Workflow Objectives**

- Identify Tasks to Automate: automate follow-up emails, assigning leads, update records and reminders
- Map Out Trigger Events: set new lead creation, deal stage update, or any other variable to trigger reminders or automations

2. **Create a New Workflow Rule**

- Select the Module: Each workflow rule is specific to a module
- Define the Workflow Name: make it easy to identify and manage

3. **Set Trigger Criteria:**

- Trigger Based on Action: Choose trigger when a record is created, edited, or based on a field update
- Specify Criteria: Refine the workflow trigger further by setting specific criteria, like “Lead Status is Qualified”

4. **Choose the Workflow Action**

- Immediate or Scheduled Action (e.g., X days after a deal stage change)
- Email Notification: Set up an automated email notification
- Task Creation: Automatically create tasks when certain criteria are met
- Field Update: Update fields automatically
- Custom Functions: Write custom code to execute more complex actions- requires Zoho’s Deluge scripting language

5. **Set Up Workflow Alerts and Reminders**

- Configure Alerts: Set up alerts to notify users of events (high-value deal enters a specific stage or when a lead status changes)
- Create Reminders: Schedule reminders for follow-up tasks or upcoming deadlines

Workflow Optimization Steps Part 2

6. **Implement Conditional Branching (If/Else Rules)**

- Create Conditional Logic: Use the “If/Else” function within the workflow to branch actions based on condition
  - For example: If the deal amount is over $10,000, assign it to a senior sales rep, Else assign it to a junior sales rep

7. **Schedule Time-Based Actions**

- Set Up Time-Based Triggers: Use scheduled actions to trigger specific tasks or emails after a certain period.
- Recurring Actions: You can schedule recurring actions like monthly check-ins with customers or updates on deals

8. **Use Blueprints for Complex Processes**

- Create a Blueprint: If process involves multiple steps and requires specific actions, use the Blueprint feature
  - (Settings > Automation > Blueprint). This helps enforce workflows by defining step-by-step processes
- Set Entry and Exit Criteria: Define entry and exit conditions for each stage in the Blueprint

9. **Test Your Workflow**

- Run a Test Scenario: Zoho CRM provides a “Test” function for workflows so you can review the actions and issues
- Adjust and Refine: Based on the test results, adjust any criteria, triggers, or actions as needed to ensure your workflow is efficient and error-free

10. **Monitor and Optimize Workflow Performance**

- Use Workflow History: Check the Workflow History to monitor the actions taken by the workflow
- Gather Feedback: use input to refine and improve the workflow configuration

Blueprint Optimization Steps Part 1

1. **Map Out Your Sales Process**
- Identify Key Stages: map out the major stages in your process
- Define Entry and Exit Criteria
- Outline Mandatory Actions: Determine which tasks, data updates, or approvals are required at each stage

2. **Set Up Your Blueprint in Zoho CRM**
- Access Blueprint: Go to Settings > Automation > Blueprint to create a new Blueprint. Select the module (e.g., Leads, Deals)
- Create Stages and Transitions: Define each stage and add transitions
- Use Transition Settings: Add instructions and reminders to each transition to guide users through the process
  - This can include step-by-step instructions, checklists, or links to relevant documents

3. **Add Validation and Mandatory Fields**
- Set Required Fields for Data Accuracy: Ensure critical information captured by making fields mandatory at each stage
  - For instance, require the “Deal Amount” field to be filled before moving from “Negotiation” to “Proposal”
  - Validate Data at Each Stage: Set validation criteria to prevent incomplete or incorrect data entry

4. **Incorporate SLA (Service Level Agreements) Compliance**
- Set Time-Based Rules: Add time limits to stages to enforce SLAs and keep your team on track
  - For example, ensure leads are qualified within 48 hours or that follow-ups are made within a set timeframe
- Automate Notifications: Trigger reminders or alerts for tasks approaching the SLA deadline

5. **Use Conditional Branching for Complex Processes**
- Create If/Else Transitions: Set up conditional transitions to handle complex scenarios
- Customize Based on Criteria: Use different branches to handle varying requirements

Blueprint Optimization Steps Part 2

6.	**Automate Follow-Up Tasks and Notifications** • Assign Tasks Automatically: Configure the Blueprint to automatically assign follow-up tasks at each stage • Send Notifications for Key Events: Set up email notifications, CRM alerts to inform team members when deal moves stages
7.	**Add Approval Processes for Key Stages** • Implement Stage Approvals: If certain stages require managerial approval, configure the Blueprint to include approval step • Set Up Multi-Level Approvals: For more complex needs, configure multi-level approvals where multiple managers sign off
8.	**Provide Detailed Instructions for Each Transition** • Add Transition Hints: Include detailed instructions or checklists in each transition to guide users on what needs to be done • Use Notes and Attachments: add notes, comments, and attachments as they progress through stages
9.	**Monitor and Measure Blueprint Performance** • Use Reports to Track Progress: use reporting tools to monitor how long records spend in each stage • Review SLA Compliance: Regularly check SLA compliance reports to ensure deadlines are being met
10.	**Document and Train Users on Blueprints** • Create a Blueprint Guide: Document each Blueprint, including stage descriptions, required actions, and criteria

Projects Optimization Steps Part 1

1. **Define Clear Project Goals and Objectives**
- Set Specific Goals: Clearly outline the purpose, objectives, and expected outcomes of each project
- Use Milestones for Key Phases: Break down projects into key phases by creating milestones

2. **Leverage Task Management Features**
- Break Down Projects into Tasks and Subtasks: Divide projects into smaller, manageable tasks and subtasks
- Assign Roles and Responsibilities
- Set Task Dependencies: Use task dependencies to indicate which tasks must be completed before others can start

3. **Use Templates for Recurring Projects**
- Create Project Templates: For projects that follow a similar structure or process, create templates
- Standardize Processes: Using templates ensures that similar projects follow a consistent process

4. **Optimize Project Planning with Gantt Charts**
- Visualize Project Timelines: Use Gantt charts to create a visual representation of the project timeline
- Track Task Progress and adjust timelines as needed

5. **Implement Time Tracking and Budget for Accountability**
- Log Time on Tasks and Analyze Time Logs: Review time logs to identify patterns or inefficiencies

Projects Optimization Steps Part 2

6. **Use Automation to Streamline Processes**

- Automate Task Creation: Set up automation rules to create tasks automatically based on triggers
- Send Automated Notifications: Use automation to send reminders, task notifications, and project updates
- Set Up Custom Workflows: Create workflows to streamline processes

7. **Enhance Collaboration and Communication**

- Use the Project Feed: Encourage team members to use the project feed for updates, discussions, and sharing documents
- Integrate with Communication Tools: Integrate Zoho Projects with other collaboration tools like Microsoft Teams

8. **Optimize Resource Management**

- Track Resource Availability: Monitor the workload and availability of team members
- Plan for Resource Allocation: Allocate resources based on project requirements
- Use the Resource Utilization Report

9. **Integrate with Zoho CRM for Sales-Project Alignment**

- Sync Deals with Projects: Link Zoho CRM with Zoho Projects to create projects directly from deals
- Use CRM Data for Project Planning: Leverage CRM data, such as customer details and sales history, when planning projects

10. **Utilize Reports and Dashboards for Insights**

- Generate Custom Reports on task completion, project progress, time tracking, and resource utilization
- Set Up Dashboards: Create project dashboards to provide an overview of project status, key milestones, and upcoming tasks

In Sum - Let’s Set Up Zoho CRM for Success

and we let’s start here:

01

Configure and optimize modules like leads, campaigns and the deal pipeline stages

02

Utilize projects, workflows and blueprints to keep organized efforts consistent and ensure effectiveness of campaigns

03

Analyze data from reports to ensure achievement of company goals and adjust strategies if need be

Thank You!