



Fwd: Zoho CRM - Requirement Discussion

1 message

anil kumar <aniludaya@gmail.com>
To: akhtharedv@gmail.com

Sun, 30 Jun, 2024 at 2:21 pm

----- Forwarded message -----
From: Dhanesh <dhanesh@prabhusteels.com>
Date: Fri, 28 Jun, 2024, 5:00 pm
Subject: Fwd: Zoho CRM - Requirement Discussion
To: aniludaya@gmail.com <aniludaya@gmail.com>

Thanks and Regards

Dhanesh Kamath

signatureImage

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 Please consider the environment before printing this email

From: Sreejith <sreejith@prabhusteels.com>
Sent: Tuesday, June 4, 2024 3:54:31 PM
To: Dhanesh <dhanesh@prabhusteels.com>; Krishnachandran <krishnachandran@prabhusteels.com>;
accounts.cc@prabhusteels.com <accounts.cc@prabhusteels.com>
Cc: acc3@prabhusteels.com <acc3@prabhusteels.com>; Praise <praise@prabhusteels.com>; 'Keerthiraj George'
<eatomd@prabhusteels.com>; srijith696@yahoo.co.in <srijith696@yahoo.co.in>
Subject: FW: Zoho CRM - Requirement Discussion

Dear Team,

Please find below trailing mail from Zoho team with regard to our last day interaction..

Thanks & Regards

Sreejith.C.B

Sr. Accountant

Ph:0484 -2575933|Extn:221

Email : sreejith@prabhusteels.com



From: Henry | Zoho Corp <henry@zohocorp.com>
Sent: Tuesday, June 4, 2024 12:20 PM
To: Sreejith <sreejith@prabhusteels.com>
Cc: 'Manoj.Prabhu' <manoj.prabhu@prabhusteels.com>; 'Praise' <praise@prabhusteels.com>; 'Keerthiraj George' <eatomd@prabhusteels.com>; gayathridevia <gayathridevi.a@zohocorp.com>
Subject: Re: Zoho CRM - Requirement Discussion

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Thank you, Gaythri.

Hello Mr. Sreejith,

Following Gaythri's note, I have added details about Zoho One for your review:

- 1. Zoho One Apps included: <https://www.zoho.com/one/applications/web.html>
- 2. Zoho One Plan details: <https://www.zoho.com/one/plan-details.html>
- 3. Support plans: <https://www.zoho.com/one/pricing/support-plans.html>
- 4. Licensing FAQs: <https://www.zoho.com/one/pricing/faq.html>

Please let me know if you need any additional information.

Thanks,

Harshendu
Regional Sales Manager - Enterprise
Mob: 730-599-6036



--- On Mon, 03 Jun 2024 18:32:50 +0530 Gayathri Devi Anbazhagan <gayathridevi.a@zohocorp.com> wrote ---

Hi Sreejith and team,

Thank you very much for your time on the POC demo session, I hope it was helpful to you team. I'm sharing here a note on the discussions we had during the meeting.

Date:	29 May, 2024
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Time:	011:00 AM to 03.00 PM IST
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Agenda:	POC demo presentation
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Participants:	Prabhu Steels	Zoho Team
	Dhanesh Kamath - Head Sales	Gayathri Devi Anbazhagan - Lead - Zoho Presales
	Krishnachandran. J - Senior Manager Operations	
	K P Hareeshkumar - Financial Cost Controller	Harshendu - Regional Sales Manager
	Sreejith - Senior Accountant	

S.No.	Topic	Discussions
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1	Zoho Corporate Presentation	A corporate presentation which includes Zoho's overview, global footprints, data security and privacy, Zoho One overview, and Zoho customers.
2	POC demo for the dealer management and sales process management.	<p>Zoho CRM customised account demonstration was done covering the B2B, B2C lead management, cross-sell, up-sell. Dealer management, dealer networking works, order management, beat plan process and SAP integration for transactions.</p> <p>Leads management process.</p> <p>1. Zoho CRM leads module was showcased for the capturing the leads via referrals, lead forms, field sales team, dealers and other channels.</p> <p>2. Lead process management with blueprint flow.</p> <p>3. Capturing multiple requirements of the customer, automated opportunity creation to the respective teams based on the product category.</p> <p>4. Opportunity process tracking with quotation, negotiation, approval process flow.</p> <p>5. Leads to conversion report. Portal access to filed sales team for entering the leads.</p>

Dealer management system.

1. Dealer lead management, dealer onboarding process were explained.

2. Contact database for managing the dealers, influencers, architects, builders were discussed.

3. Dealers and influencers visits management with beat plan module -> Meetings planner -> approval -> Check-in and check-out for the meetings -> Zoho Expense for tracking the GPS route taken by the sales team for visits and conversion on those visits to expense entry automatically.

4. Orders module for tracking the dealer orders, B2B customer orders, B2C customer orders.

5. SAP integration for the transactions sync with Zoho CRM.

6. Reports on the sales done specific to dealer.

7. Dealer stock profile module.

8. Customer purchase profile summary.

9. Automated rating and segmentation of dealers based on the purchase.

10. Schemes and offers management for the dealers.

Dealer Portal Management.

1. Dealer log-in to Zoho Creator portal for tracking the order status, order entry, scheme and offers tracking, target and achievement dashboard.

2. Zoho Creator portal for the field sales team for entering lead enquiries.

3. Zoho Creator portal for the logistics team - drivers and crew members for receiving the job orders and updating the delivery of the orders.

Logistics Management.

1. Zoho CRM custom modules for tracking the trucks and vehicles available for logistics, drivers availability tracking.

2. Separate section for the stock yard team and logistics team for updating the status of the order.

		<p>Reports and dashboards.</p> <p>1. Management dashboard for tracking the sales profile specific to products and as a whole org report.</p> <p>2. Sales person performance report.</p> <p>3. Product wise target set and achievement report.</p> <p>4. Dealer sales report.</p> <p>5. Order fulfilment report.</p> <p>Zoho One Overview and the applications use cases were also discussed for contract management, HRMS process management, collaboration applications and Zoho Workdrive.</p>
3	Zoho Products and Bundle suggested for solution	Zoho CRM, Zoho Expense, Zoho Creator, Zoho Desk for ticketing process. Zoho CRM Plus bundle and Zoho One bundle was also discussed.

Key milestones for further engagements

S.No.	Topics	Subject	Ownership
1	Price discussion and proposal to be shared	Price break-up for Zoho individual applications and bundle product to be shared.	Harshendu

Thank you.

Regards,

Gayathri Devi A

Senior Solutions Consultant / Zoho Presales

--- On Mon, 13 May 2024 12:25:28 +0530 **Sreejith** <sreejith@prabhusteels.com> wrote ---

Hi Gayathri,

Following our recent discussion regarding the requirements for the new system, I am attaching some of the reports that we currently generate from our existing app. These reports should provide you with a clearer idea of the data and insights we work with.

Additionally, I have created a screen recording demonstrating how our current app functions to give you a better understanding of its features and capabilities. Please review the below link at your convenience.

https://drive.google.com/file/d/1pBhGCUj58Utod-n7ndCsghh9itO3yQ4J/view?usp=drive_link

Should you need any further information or updates, please do not hesitate to contact me. I am more than happy to provide any additional details or support required.

Looking forward to your feedback.

Thanks & Regards

Sreejith.C.B

Sr. Accountant

Ph:0484 -2575933|Extn:221

Email : sreejith@prabhusteels.com



From: Gayathri Devi Anbazhagan <gayathridevi.a@zohocorp.com>
Sent: Thursday, May 9, 2024 5:46 PM
To: sreejith <sreejith@prabhusteels.com>
Cc: Harshendu Udayaprakash <henry@zohocorp.com>
Subject: Zoho CRM - Requirement Discussion

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Sreejith,

Greetings from Zoho.

Thank you for your time during the requirement discussion meeting and for making the engagement interactive. In reference to the same, recapturing the points discussed during the session;

Date:	7 May, 2024
Time:	012:00 PM to 01.00 PM IST

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Agenda:	Requirement Discussion Call
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Participants:	Prabhu Steels	Zoho Team
	Sreejith - Senior Accountant	Gayathri Devi Anbazhagan - Lead - Zoho Presales
		Harshendu - Regional Sales Manager

S.No.	Topic	Discussions
1	Business Overview of Prabhu Steels	They are distributors of Tata steels and takes care of sales of most products of Tata Steels which are defined ones for B2B and also custom products for B2C.
2	Key Requirement	<p>Team Structure</p> <p>Sales head</p>

- 2 regional managers

- Senior sales officers(2 or 3 districts)

- ASO area sales officers (one per district)

- Sales Executives (4 or 5 per district).

The Sales process involves B2B sales and B2C sales.

B2B Sales process.

1. B2B sales leads are majorly via dealers, orders will be received from other B2B sectors like construction contractors, architects and engineers. Leads will come from Tata steel as well.

2. Dealers will be placing monthly orders which are planned orders, express orders or unplanned orders will also be placed.

3. Dealers will have some schemes - targets per month - number of tones of steel lifted or purchased -> based on the

target achieved ->
bonus is given as scheme.

4. ASO and Sales executives will be meeting the dealers 2 a month to follow-up on orders, marketing demands, other competitors and also schemes and offers.

5. Dealers are having multiple brands products -> Tata steel is the costliest product.

6. Other B2B orders are coming via Tata steels, via dealers, ad campaigns and call enquiries.

7. Sales executives will be meeting the end consumers who will procure products - leads are from dealers or online channels -> Meet the customers -> Price discussion -> They will get orders from near by dealers.

8. Sales executive will give a quote to customer -> connect them to dealer -> dealer will finalise the price. Prices for distributors and dealers are defined and shared by Tata steel.

9. Sales Executive will follow-up with the customer or dealer to get the status of the deal - material is delivered or lost.

10. Dealers target achievement, monthly orders and its delivery are followed-up by ASO and Sales Executives.

B2C Sales.

1. B2C specific products will be displayed in dealer's showrooms. Leads will be enquiring at dealer out-let and these enquiries are passed on to distributor's sales team.

2. Sales Executives will call the customer, discuss on the custom requirement.

3. Based on the requirement -> Accessories of the custom product (60 to 100 attributes are to be selected for one SKU) are selected and confirmed with customer to place the order.

4. Order details are shared with Tata Steels, they will manufacture the products.

5. Once its manufactured, the product will be delivered to customer by Prabhu steels - Sales Executive will co-ordinate on the work.

Inventory Management.

1. Stockyards are in kochi.

2. B2B products stocks and B2C products catalog are managed.

3. Stock yard team will check the stock availability and update the status in orders.

4. When the stock will be available, how the order can be processed with existing stocks will be updated by stockyard team on the order record.

5. Stockyard team - managers, supervisors - 50 members (7 acre land). Invoicing and accounting is done in SAP. Quotes, sales orders, invoices - are managed in SAP.

Sales Process and Order Process Requirements.

1. Leads management.

2. Dealer database, dealer visits, beat plan module - Update attendance, meetings with customers, follow-up and calls.

3. Order acquisition and order delivery follow-up.

4. Schemes and offers follow-up.

5. Dealer's target setting and achievement tracking.

6. Visits check-in, check-out, meeting time and mileage expenses to be tracked.

7. Overall expenses of sales team and their reimbursement to be tracked.

8. Sales person movement - punch in for visits -> check-ins are done at client's location - based on the check-ins the total distance is calculated - converted to expense. Scanning the invoices of the expenses -> Expense receipts to be uploaded -> Expense records are done -> Approval of expenses -> Reimbursement.

9. Aprox visits per day - 10 stops minimum - monthly target for visits are also there. SAP integration with Zoho CRM - order confirmation to sales order creation in SAP.

10. Communications - majorly visits, calls, whatsapp.

Portals Required.

1. Dealer Portl - for scheme and offers dashboard.

		<p>2. Target and achievement KPI reports.</p> <p>3. Orders module to place monthly orders.</p> <p>4. Leads module for submitting B2C and B2B order enquiries.</p> <p>5. Stockyard team portal - to see the orders placed and update the stock status for orders.</p>
3	High Level Solutions Discussed	Zoho CRM for the entire sales process tracking, dealer management, beat plan module, communications and follow-up management. Zoho Creator portals for dealers and stockyard team. Zoho Expense for expense tracking.
4	Main sources of leads	Tata Steels, Dealers and online channels of emails, website, whatsapp and calls.

Key milestones for further engagements

S.No.	Topics	Subject	Ownership
1	Sample data to be shared.	Sample data for leads, dealers, inventory, B2B and B2C order, schemes and few examples of reports required.	Sreejith - Prabhu Steels
2			Harshendu

	POC Demo to be scheduled	Once the sample data is shared, the poc demo date and time slot can be confirmed	
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Thank you.

Regards,
Gayathri Devi A
Senior Solutions Consultant / Zoho
Presales