Automate your sales processes with Zoho CRM

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You might have heard the old saying, **"time is money."** This adage couldn't be more true than in the fast-paced world of sales, where every won deal generates more business for the company. More deals mean more revenue, and sales reps have to be on top of their game every single day to make sure that it happens.
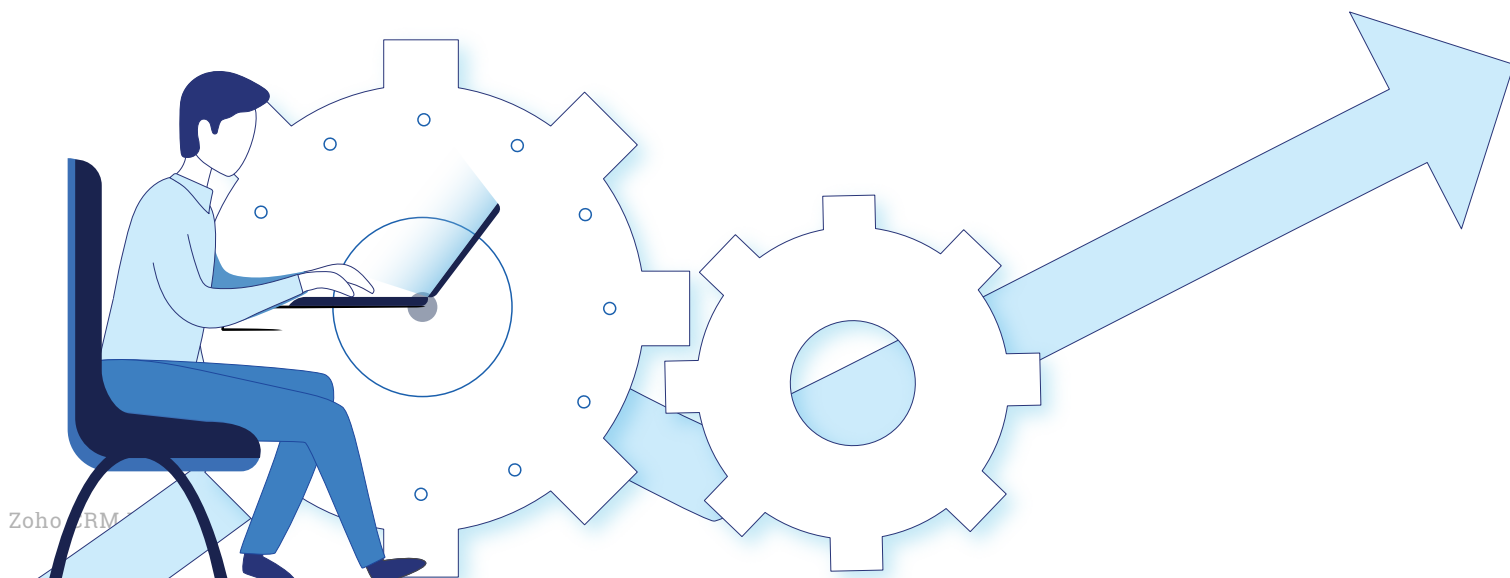
Salespeople certainly don't have it easy though. They interact with hundreds of leads, contacts, and customers every day while also performing a host of regular activities and tasks. This could range from following up with the leads they met at a trade show, visiting those leads, showing them a product demo, prospecting with contacts, negotiating with them and finally closing deals.

Sales managers have the responsibility of assigning leads to various sales reps, and may also need to send pre-sales and post-sales follow-up emails to customers at scheduled intervals.

Doing all these tasks manually can be repetitive, time-consuming, and overwhelming towards the end of a long and hard day. What's more, it can take sales reps away from their primary goal of "closing more deals".

Wouldn't automating these repetitive tasks make your job much easier and let you maintain your focus on closing more deals?

Zoho CRM has the tools you need to automate your sales processes, from lead generation to closing a deal.

What can you automate
in your sales process using Zoho CRM?

Through Zoho CRM, you can automate different stages in the customer lifecycle, from lead generation to closing deals. This ebook will show you how you can automate the following:

- Generation of leads from website and social media.

- Assignment of leads to sales reps.

- Follow-ups with leads and prospects.

- Communication with leads, prospects, and customers.

- Sales process and routine.

Automate Lead Generation

Lead generation from website

The first stage of your sales cycle is generating leads for your business. Some leads may have visited your website to learn more about the latest product updates. Others might have glanced through your website to see if you are offering what they want. When you have leads visiting your product website or landing pages, it will save you a lot of time if you're able to capture the lead information quickly. Zoho CRM gives you both customizable and pre-built web forms to automate this lead generation process. You can use web-to-lead forms to streamline lead generation by capturing the lead or prospect's information directly into CRM.

To do this go to ⚒ > **Developer Space** > **Webforms** and select the Leads module. Then, build the web form by adding fields and other details such as the landing page URL, the form's name, assignment rules to assign the leads to users, etc. Once you design the form, you can generate the code and publish it on your website.

Lead generation through social media

Interacting and engaging continuously with your prospects on social media is crucial for the growth of your business. When people interact with your company or brand on social media like Facebook, or Twitter, you can generate leads through conversations. If they have complained about your brand or service, you get an opportunity to message or tweet them and possibly resolve their issues. How can you automatically add those who follow you on social media as leads and contacts in CRM?

To do this, you can use social automation rules. For instance, you can instruct CRM to automatically add whoever mentions your brand on Twitter as a lead and assign this lead to a sales rep for regular follow-ups. Some other social media triggers can be direct messages, retweets, favorites, and likes. Once you've added them as leads and contacts, you can automatically assign these leads and contacts to sales reps.

You can also set parallel conditions for this. For example, you may want to add someone who mentions your brand on Twitter, as a contact, but if someone only retweets your tweet, you may want them to be added as leads.

In this case, there are two conditions in place. So if someone mentions your brand, the action taken should be to add them as contacts and the assignment rule as **Social contact assignment**. Similarly, when they retweet your tweet, you can take the action to add them as leads and add the assignment rule as **Social lead assignment.** You can set it up from ⚒ > **Channels** > **Social** > **Lead Generation tab**

Automate Lead Assignment

When sales managers assign only few sales reps to follow-up with the leads, they may end up with too many follow-up emails to send and calls to make, and as a result, miss out on other important sales activities. Remedying this is simple. Distribute these leads equally among sales reps, giving them an opportunity to interact with prospects and make sales without sacrificing time on any activity. In some other cases, you might want to assign leads with the potential to become big deals, to your best sales reps. You can take help of Assignment Rules which is accessible from

⚒ > **Automation** > **Assignment Rules.**

Lead assignment happens in CRM when lead generation is automated. When leads are captured from webforms and through social media, we assign them to the respective sales reps. But apart from these, you can automate the distribution of leads in these ways:

Assign leads through round-robin method

The round-robin method of lead assignment in Zoho CRM helps you automate the lead assignment process by assigning leads to multiple users of the Zoho CRM account equally. Let's say Joe, a sales manager at Zylker Corp, has four sales reps in his team: Amelia, Charles, Quinn, and James. He wants to distribute leads from Sydney among these sales reps. He can do this by creating a lead assignment rule called **"Sydney Leads"**, and choose to assign these leads to the sales reps in a round-robin fashion.

He can also select a workflow task that can be assigned to these reps once the leads have been assigned. Let's look at how the round-robin lead assignment rule works.

How it works

Here's how the round-robin lead assignment rule works. Each time a new lead is created, a lead number is automatically generated, and the leads get assigned sequentially to the sales reps.

That means the first lead will be assigned to Amelia, the second lead to Charles, the third lead to Quinn, the fourth lead to James. The next lead will be assigned to Amelia, and it follows the same sequence again.

Joe now knows that the leads from Sydney will be assigned equally among his sales team, and none of them will have more leads than they can handle. However, if he would rather assign these leads to specific owners with a proven track record of closing deals quickly, he can do that too.

Selecting a record owner

Steve Watson is a senior sales rep who has been instrumental in winning big deals for the UK sales office.

Joe, the sales manager, wants more revenue from the UK office. He can simply select James as the user to whom the leads should be assigned, and select the workflow task to be assigned to him.

> ⭐ **NOTE:**
> The assignment rule is only applicable for the records in leads, contacts, cases, and custom modules that are either imported or the captured through web forms.

Assign leads by source

Leads are obtained through various sources like trade shows, seminars, advertisements, marketing campaigns, websites, web forms, and others. Assigning all leads to the same sales rep will only burden them and bring down their productivity.

Instead, you can assign leads based on their source. Let's say Joe, wants to assign leads generated through trade shows to Jerry, a sales rep. He can create a lead assignment rule which will automatically assign all the leads generated through trade shows to Jerry. Similarly, he can create another lead assignment rule to assign leads generated through web forms to Alice, and leads generated through advertisements to Amelia.

Now that leads have been automatically assigned to sales reps through different methods, you can also automate the follow-up process.

Automate Follow-Up Tasks

Your sales reps have met a bunch of leads and prospects at a trade show and would like to send them welcome emails, while also offering them a glimpse of some of the latest products you offer.

Since there are hundreds of leads and contacts, you will be sending the same content to these leads and prospects, repeatedly. Automate this process instead, by setting up workflow rules.

Create workflow rules

When new leads are being added to your CRM, you would like to follow-up with them by sending them a welcome email. You can create a workflow rule for the Leads module, and choose the relevant email template to be sent.

In the future, whenever new leads come into your CRM system, they will automatically receive an email, welcoming them to Zoho CRM. You can also update tasks and fields through workflow rules, which will get executed after certain workflow conditions are met.

There are three options that specify when a workflow rule should be executed.

1

A Record Action

This option lets you specify an action based on which workflow rules will be triggered. Rules can be triggered when records are created, edited, created and edited, deleted, or when specific fields are updated.

Say new leads have been added in Zoho CRM and you want to send them a welcome email, or a series of emails, and also create specific tasks for them. You may also want to trigger a workflow when specific fields are updated.

2

A Date Field's Value

This option lets you pick a date field from a record and define the day when the rule should be triggered.

For all the records matching the rule criteria, a rule will be triggered every month or year, based on the value of the date field selected. For instance, you may want to get an email reminder a week before a deal's expected closing date, or send an email to customers reminding them of their monthly rentals or subscription renewals. In such cases, no fields have to be edited or deleted to trigger a workflow rule. The action is based on the value in the date field.

3

A Score Value

Workflow rules can be triggered when the score of a record increases, decreases, or gets updated. Let's say leads from the service industry are your prime prospects, and you want to prioritize them based on their scores. So, if leads have a score of 10 or more, you can create a workflow rule and create a task to follow-up with these leads immediately.

Multiple conditions

Workflow rules can be created for multiple conditions. In fact, you can set up to 10 workflow conditions at a time in the Enterprise edition.

Let's take an example:

When you meet prospects at a trade show who could be worth over $5000, you would like to alert the sales manager about these deals and also assign a task to the record owner to check the discount guidelines before offering a final discount. If the deal amount is worth $2500 or more you would assign a task to the record owner to close the deal within a week. For prospects that don't match any of these criteria, you can simply assign a task to the record owner to close the deal within a week and give the prospects a 15-day trial in the meantime. This does not require you to create three different workflow rules. Instead, you can accommodate them all in a single workflow rule by adding multiple conditions. One condition if the estimated revenue could be worth more than $5000, another if it ranges form $2500 to $5000, and so on.

Once you've created workflow rules and set up multiple conditions, you need to know which workflows have worked and which ones haven't.

ℹ️ **Know how your workflows are performing**

Not all workflows work the way you intended them to. You need to clearly know which workflows have been successful and which workflows need to be improved so you can modify the ones that haven't worked.

Zoho CRM gives you additional insights on the usage of those workflow rules that have the action to send email notifications associated to them.

You can view the best performing workflow rules for each week based on the open rate of the email templates. When you go to the Usage tab in the workflow insights page, you can view the list of the top performing workflow rules by email open rates for the last 7 days.

Usage

Top Performing Workflow Rules by Email Open Rate - Last 7days.

Rule Name	Template Name	Open Rate(Workflow)	Open Rate(Global)
Tradeshow Leads	Welcome to Zylker	14.2%	14.7%
Big Deals	Welcome Email	14%	15%
First followUp	Welcome to Zylker	12.8%	11.5%

i Detect anomalies in your workflows

When you've setup multiple workflows for your leads and contacts, you might sometimes send two or more emails to the same contact through multiple workflows. So how can you detect anomalies like this? Zia, your intelligent sales assistant, will closely monitor the execution of workflow rules on your CRM records.

When you click on individual alerts to view more details, Zia will show you the respective workflow names and any repeated email notification messages. She will also alert you that the workflow rules you've configured may cause the same email template to be sent twice to the same lead. This will save you the embarrassment of duplicating your messages through different workflows.

Engage constantly with prospects

Most deals need a fair bit of negotiation and persistence before you can close. You need to constantly engage with prospects to eventually persuade them to sign up for your service.

Let's say a user has signed up for the trial period of your product. Instead of manually sending this user a series of emails at regular intervals, you can simply automate this task and send email messages on different days, like a drip campaign. For instance, you can send a **Getting Started** email on the first day, a **support and feedback** email on the second day, an email about the latest product updates on day five, an email about a special purchase offer on day 15, and a reminder email on the 25th day.

Autoresponders come in handy here. You can set up autoresponders by selecting the Leads module and clicking the Autoresponders link in the Leads home page.

Once you've done this, you can:

- Enter a name for the autoresponder.

- Select the user to whom records will be assigned.

- Set up the list of recipients for the autoresponder.

- Choose the templates that need to be sent on different days of the week.

Follow-up promptly with leads

For small and medium businesses, following up with a new lead is as important as generating a new one. You can generate a number of leads, but if you don't follow up with them soon enough, they're very likely to move to your competitors. Research [(insidesales.com)](insidesales.com) has shown that 78 percent of buyers respond to those vendors who respond to their needs immediately. As a sales rep, when you're calling 50 new leads everyday, there's a good chance that 20 of those calls will go to voicemail.

You will have to quickly follow-up with these leads before they move to another company or service. You can automate your sales routine in such a way that you get timely reminders to follow-up with prospects before it's too late. You organize a user conference and plan to perform the following set of actions for all those who attend the conference.

- Send a follow up acknowledgement email.

- Update the Status field as 'Contacted'.

- Create a task to send brochures and schedule a demo.

Wouldn't it be a lot easier if you could automate these three actions instead of selecting records and performing them individually? Simply combine these actions in a single macro, select the records for which you want to apply, and run the macro.

> **ℹ Auto suggestion of macros**
>
> There will be instances when you need to make quick and important decisions on prospective deals. Say you're negotiating with a potentially big deal and it requests an additional five percent discount on the product. You need the approval of your manager or another superior before deciding to approve or reject this request.
>
> To do this, you may be drafting a number of individual requests, sending them to your manager, and waiting for their go-ahead; a process that could take several days.
>
> Avoid jumping through so many hoops, and simply automate the submission of records for approval.
>
> > ★ Those with the Manage Automation profile permission can set certain criteria based on which the records will be sent for approval.
>
> When you go about creating or adding an approval process, you need to clearly specify the rule criteria, the name of the manager who needs to approve it, and associate the relevant actions that need to be carried out after the request has been approved or rejected.

Let's say your criteria in this case are Order **Quantity > 50 and Discount >=5%**. You need to select the Deals module, give the process an appropriate name and description, and select what action you would like to execute of the approval process. You can also choose who should approve these records. It could either be users who you select manually, users associated to roles in the organization, users belonging to specific groups or those at a superior level.

Say James, a sales rep at the US office, has three people at immediate superior roles to him. There's Mary, a senior sales executive for the US region, Jeremy, sales manager for the US region, and Matt, sales manager for the European region.

The approval process asks for two levels of approval. In this case, James would need the approval of two immediate superiors, Mary and Jeremy. Once you've selected who will approve or reject the criteria, you can associate more actions such as adding a task, updating a field, sending an email alert, calling webhooks, and more. In case there are multiple stages of approval that need more than one user to approve the record, you can assign a task and update the field as soon as the records have been approved. However, if one of the managers has already rejected the criteria, you won't be able to assign a task for the superior.

Automate A Lot More With Functions

When you've generated a lead in CRM and sent the lead a welcome email, you also need to create tasks, delegate them to specific users, set up events, and carry out other tasks. Earlier, you read about the assignment of leads in a round-robin method. This ensures equal distribution of leads among sales reps. Consider this scenario. There's a group of sales reps at Zylker's US office working in general shift and another group of reps working in night shift.

Leads need to be promptly followed up and time difference should not become a roadblock. Functions can help you assign leads to people working the appropriate shift, while still using the round-robin method. You can create your own functions in CRM to suit your business process, and by using them in conjunction with workflows and automating them, you can maximize the benefits of this feature.

If you want to make sure sales reps in the night shift follow up with leads from the US, you can create a function to do this. Similarly, you can create another function to make sure that sales reps working in the day shift follow up with leads from Japan.

Let us look at another example. Most companies follow a procedure which calculates the sales revenue generated by a specific sales rep. Thus, the sales rep's sales margin is scrutinized and used for his evaluation or any other purpose.

Sales margins can be used to facilitate a healthy rivalry between your employees. It can also be used to evaluate the performance of not only individual employees, but also different teams.

Now, imagine having to manually calculate the sales margin for each deal and populate them in a field. Same for calculating the aggregate margin for a team when you run reports. This can be automated using functions.

You can create a function to automatically calculate the sales margin and populate it in a field. Then, automate the process by using the function in a workflow, to display the sales margin in real-time within a Dashboard. Additionally, you can have your own 'conditions' in workflows, such as sending a notification to the seniors once the discount value crosses a certain limit, or if the deal amount is too much or too little.

Streamline Your Sales Process

Any organization that uses software to run its business needs to ensure that their processes are correctly mapped to that software system. When this doesn't happen, there are bound to be loopholes and inconsistencies in the way of execution.

Consider a deal follow-up process in your company. This has several stages such as "Qualification", "Negotiation", etc., with different teams being responsible for completing each stage. Your strategies to close deals may be mostly discussed offline in boardroom meetings, conversations with managers over cups of coffee, etc.

However, if the details of the processes are not captured by the system used to execute it, in this case CRM, how will you know if all sales reps execute a process as decided in your policies? How will you know when a deal has moved from the 'Negotiation' to the 'Discount Approved' stage? Or, when a sales rep has updated the field status to 'Contacted'?

Some sales reps might update the status after a single attempt, while others might do so after five attempts. Some may even forget to add notes after a follow-up making it difficult for any other sales rep to track what actions have already been taken. You need to have a standard process that all your sales reps follow to ensure greater accountability.

So, when a process is not mapped to a system that you use, you run the risk of not having compliance in your organization. This is where Blueprint enters the picture. A Blueprint in Zoho CRM allows you to build a business process, define its stages, specify details of who handles each stage and what has to be done to complete it, and automate routine actions that are part of the process. This way, your software system knows the process as well as you do, so there are no inconsistencies or gaps in its execution. With a Blueprint you can,

- Define every stage in a process and associate the right people with each stage.
- Guide your teams through the execution of the process.
- Mandate and validate important information contextually.
- Automate routine sales actions.

Creating a Blueprint

Creating a Blueprint largely consists of two stages: Defining the process flow and defining the transition settings.

Part A - Process Flow

A Blueprint process flow is made up of States and Transitions.

Every stage in the business process is a State, while transitions are the links between the two states in a process. For instance, the conditions and actions required for a deal to move from the **'Negotiation'** to the **'Discount Approved'** stage can be mentioned in a Transition block called **'Negotiate'.**

You can start designing a blueprint by specifying the module, layout, and field for which the process should be created. Once this is done, you can define the process flow by dragging and dropping each stage into the Blueprint Editor.

PART B - Transition Settings

Transitions are the blocks that define the conditions and actions required to complete each stage of a process.

There are three segments in a transition:

Before Transition, During Transition, and After Transition.

The **Before Transition** segment decides who should execute the transition for which stage. For example, in the product demo stage, the sales rep needs to give the prospects a demo. In this case, the criteria for the **Before Transition stage** will be **None.**

The **During Transition** segment decides what information should be prompted by the transition owner for the transition to be completed.
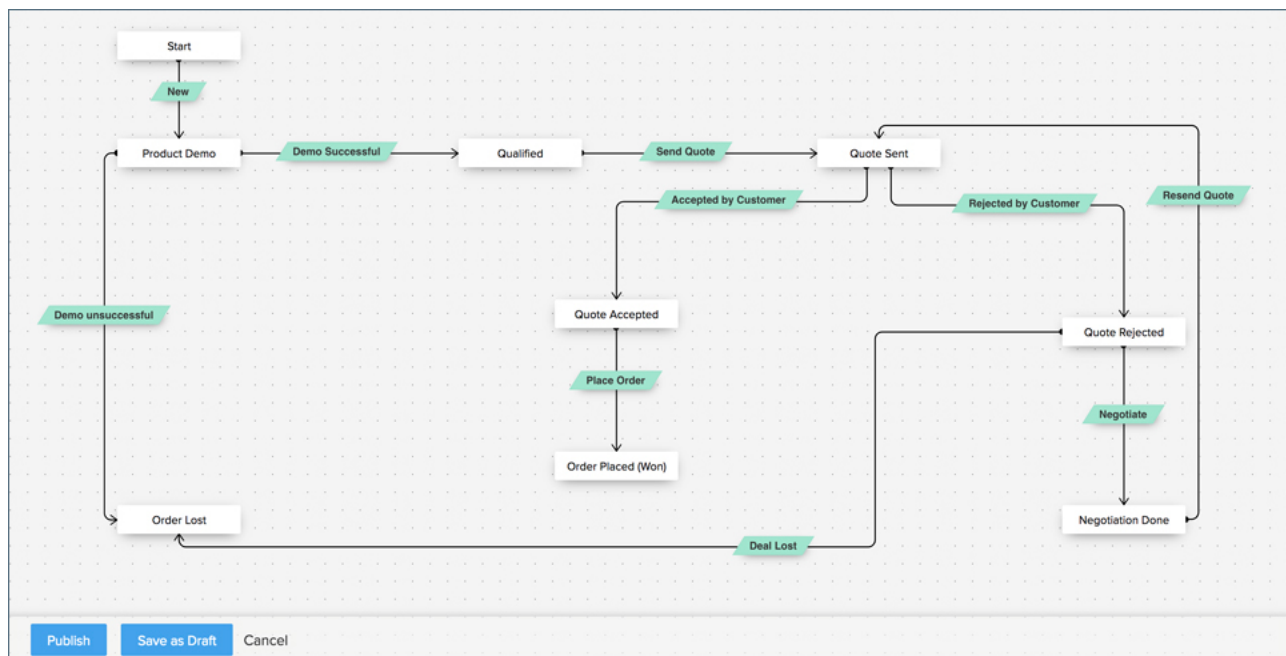
In this case, the transition owner will have to send a message to the prospect regarding the product demo. They can send an email asking for the best time to schedule a product demo session. When prospects respond to this message, the transition owner can set the appropriate date and time to meet them.

The **After Transition segment** decides the actions that can be automated when a Transition has been executed such as sending emails, assigning tasks, configuring webhooks, or marking field updates.

In this case, a product demo notification email will be sent to the sales manager and a task to arrange for a demo will be created by the transition owner.

This is how your Blueprint will look. The white blocks *(Product Demo, Qualified, Quote Sent)* are the States and the green blocks *(Demo Successful, Send Quote)* are the Transitions in this process flow.

Blueprint process flow

ℹ️ **Checklist**

Checklists are simple to-do items that are mandated as part of the During Transition segment. By mandating a checklist you will ensure that your teams mark off each important item on a the list to proceed to the next stage in the process.

For example, checklists are handy if you wish to mention the list of documents that need to be attached or the list of tasks to complete at a given stage.

Time Limits for States (SLAs)

You can't afford to have a deal in the qualification stage and not follow up with them for too long.

Blueprint will ensure you're notified if a record has been idling in a particular state longer than necessary. However, how do you know how long is too long, and to whom should you notify? You can configure these details as part of the Blueprint using Service Level Agreements (SLAs). For example, if a lead has stayed in the Qualification stage for over three days, the lead owner will get an immediate alert from the system.

When you configure an SLA for a deal that is in the qualified stage, you can set the maximum time limit for which it should remain in that state, and set an additional alert to be sent before or after the SLA time limit. This will ensure that you follow-up promptly before it's too late.

Order Of Execution

Now that you're aware of all the different automation features that Zoho CRM has to offer, you might choose to enable some or all of the automation features.

If you choose to have all the automation features enabled in Zoho CRM, they will be executed in the following order:

- Assignment rules

- Workflow rules

- Approval process

- Blueprint

Conclusion

Zoho CRM has all the tools you need to automate every stage of your sales process, whether that's lead generation, follow-ups, approvals, communicating with your customers, or creating a uniform sales process that all sales teams should follow. This lets you focus less on the mechanical stages of the sales process and more on generating additional revenue for your company.

Try these automation features and see how they significantly cut down on the time you dedicate to manual, repetitive tasks, and improve your productivity in the long run.

ZOHO CRM

Contact Us

USA

- **California**
  Zoho Corporation
  4141 Hacienda Drive, Pleasanton,
  California 94588, USA
  Phone : +1 877 834 4428 | +1 615 671 9025

- **Austin**
  Zoho Corporation
  3910 S, IH 35, Suite 100, Austin,
  Texas 78704, USA

INDIA

- **Chennai**
  Zoho Corporation Pvt. Ltd.,
  Estancia IT Park, Plot No. 140 & 151, GST Road,
  Vallancherry Village, Chengalpattu Taluk,
  Kanchipuram District 603 202, INDIA
  Phone : +91 (44) 71817070 | +91 (44) 71817000
  +91 (44) 67447000

- **Tenkasi**
  Zoho Technologies Pvt. Ltd.,
  Silaraipuravu Village, Mathalamparai,
  Tenkasi, Tirunelveli District 627 814, INDIA

Zoho CRM Resources

www.zoho.com/crm/resources