

Data Management and Analytics Implementation in Zoho CRM for Improved Efficiency



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SOP Overview

- Department Name : Data Analytics
- Application Name : Zoho CRM

Glossary

Account and Contact Mapping: In Zoho CRM, **account and contact mapping** refers to the structured relationship between companies (accounts) and the individuals (contacts) associated with them. An **account** typically represents an organization or client company, while a **contact** refers to a specific person within that organization, such as a manager or decision-maker. Multiple contacts can be linked to a single account, enabling teams to manage all interactions, deals, and communications in a centralized way. This mapping allows for a clear hierarchy, streamlined communication, and better sales tracking. It also supports lead conversion, where leads are automatically mapped into accounts and contacts for continued engagement.

Glossary

- **Account and Contact Mapping:**

This mapping system in Zoho CRM helps businesses maintain organized and meaningful relationships by clearly defining who they are working with and at which organization. By linking contacts to accounts, users can view all related activities, emails, deals, and tasks in one place, making customer management more efficient. It also enables sales teams to track the role of each contact within an account, such as influencers or decision-makers, which is crucial for deal closures. Overall, account and contact mapping enhances visibility, ensures better collaboration across teams, and improves customer relationship strategies.

Safety Precautions

- Data safety is important for protecting personal and confidential information from unauthorized access or misuse.
- Data safety is the protection of data from unauthorized access, use, modification, or destruction.
- Data safety ensures the confidentiality, integrity, and availability of data.
- Data safety requires policies, procedures, and technical measures to prevent data breaches and losses.
- To avoid plagiarism, you should always cite your sources properly and use quotation marks or paraphrasing when using someone else's words or ideas.

About this SOP

- This SOP will help you for Account and Contact Mapping in Zoho CRM applications. Also provide the step-by-step process for Account and Contact Mapping and the interactive video to understand the concepts.



1 Data Collection and Structuring Process

Comprehensive data collection from official websites and LinkedIn for accurate mapping



Structured dataset creation for institution details and faculty information management



Creating Institution Details Spreadsheet

Capture critical data including college departments, labs, and student counts in an organized Excel format.



Developing Faculty Details Spreadsheet

Compile essential information on faculty members such as names, designations, and contact information.



Data Standardization Procedures

Standardize names and contact details to enhance data consistency prior to CRM import.

Web scraping and manual research methodologies for effective data extraction

Manual Research Best Practices

Employ strategic search techniques to uncover relevant information that may not be accessible via scraping.

1

Techniques for Effective Web Scraping

Utilize advanced tools to automate data extraction while ensuring compliance with website policies.

2

3

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Conduct thorough validation of emails and phone numbers to maintain data integrity in the CRM.



2 Data Import and Role Hierarchy Implementation

Refined data import into Zoho CRM for streamlined account management



Comprehensive Data Structuring Strategy

Developing a structured approach to collect and organize data from various sources, ensuring precision and consistency.

Establishing reporting structures for efficient organizational hierarchy



Defining Clear Reporting Relationships

Establishing a clear reporting structure within the organization to enhance communication and accountability.



Mapping Roles to User Permissions

Aligning user permissions with defined roles to ensure appropriate access levels within the CRM system.



Streamlined Role Hierarchy Configuration

Creating a streamlined role hierarchy that outlines the organizational structure from executives to entry-level staff.



Performance Evaluation through Hierarchical Reporting

Implementing a reporting structure within the organizational hierarchy for effective performance evaluations and employee development initiatives.

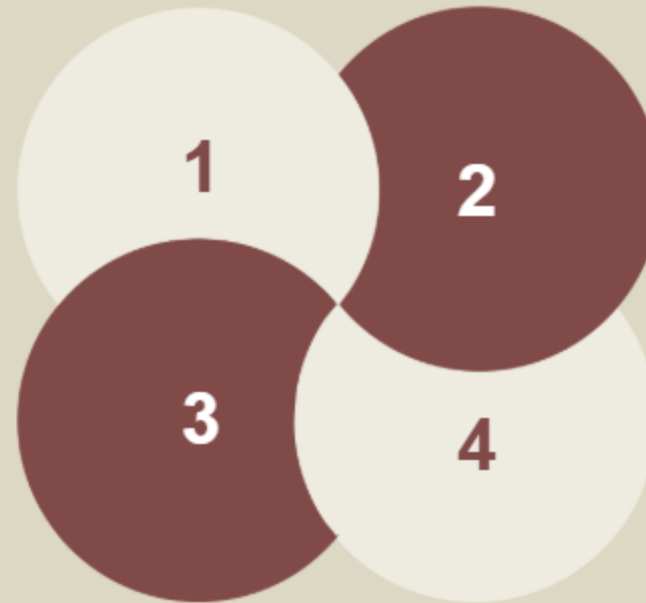
Configuring user permissions based on defined roles within CRM system

Role-Based Access Control Implementation

Implementing role-based access controls to secure sensitive information and enhance data integrity within the CRM.

Regular Audits for Permission Management

Conducting regular audits of user permissions to ensure compliance with organizational policies and data protection regulations.



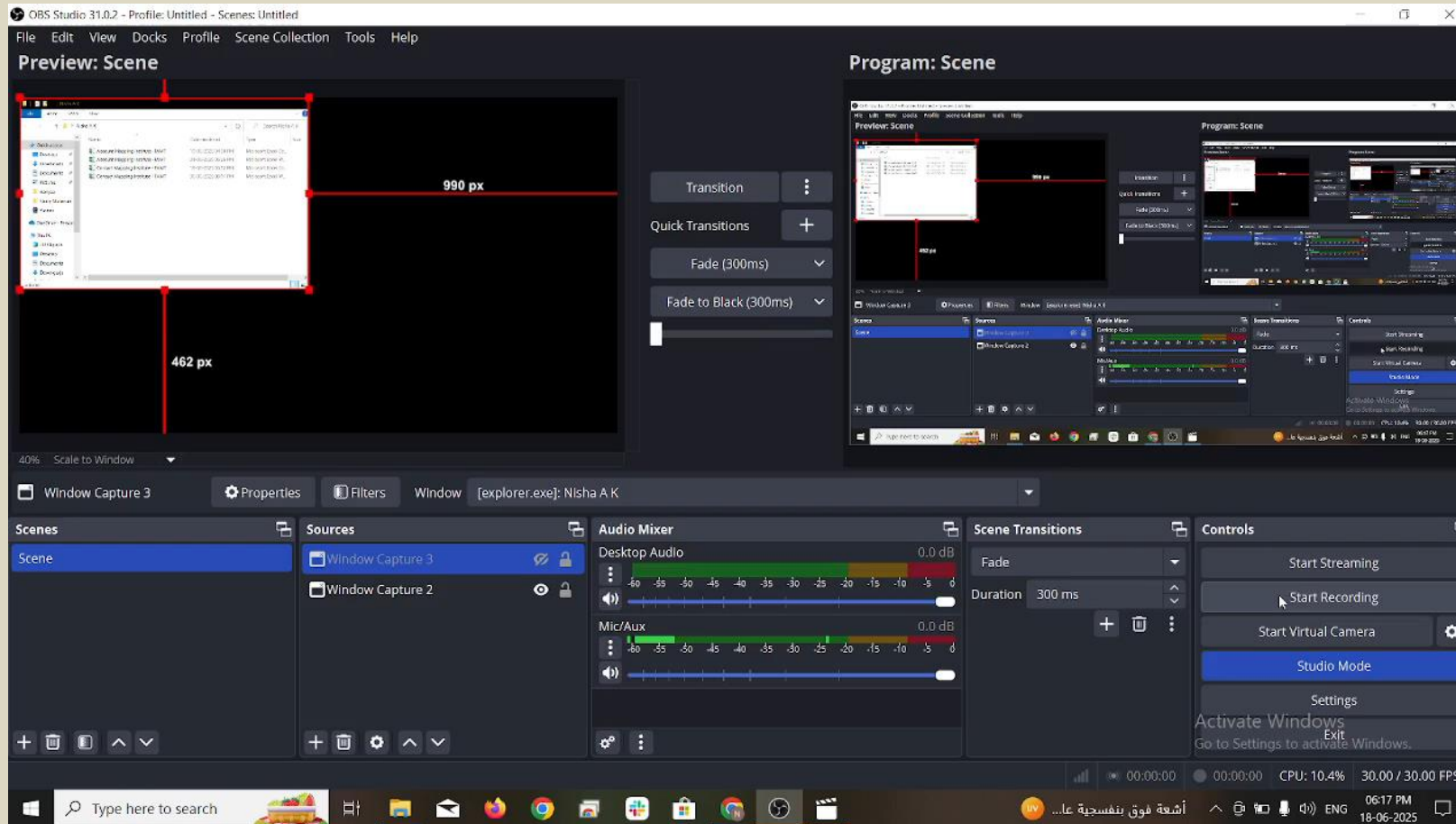
User Empowerment through Permissions

Empowering users by defining clear permissions that align with their roles, promoting accountability and efficiency.

Training on Permission Utilization

Providing training to staff on how to effectively utilize their permissions to maximize productivity within the CRM.

Skill Capture Video



THANK YOU



the Win
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