Zoho Training,

Section 1: Introduction

Speeding up a video higher than 2x:

F12 or inspect element

In the console write

var vid = document.querySelector('video'); vid.playbackRate = 4;

Section 2: CRM Overview

What is a CRM?

CRM = customer relationship management

There are many CRM systems on the market including Zoho CRM, Salesforce, Infusionsoft, Microsoft Dynamics and Pipedrive. The purpose of a CRM is to store data about current and prospective customers to make it easier for a business to effectively sell products and services to them. Normally what happens is that when a business is brand new, the founder keeps track of customer requests on Post It notes, their mobile phone contact list, their email inbox, various spreadsheets and their brain. This works relatively well up to a point but when they start hiring other people to help them, it quickly becomes a nightmare. Where's the phone number for John Hathaway? When are we meant to deliver the cement to the Beaverson development? Did anyone respond to the guy who was interested in a new swimming pool?

At a certain point, it's time to get organized. Instead of having customer information scattered around in multiple sources, it's time to have a single source of truth. If you want to know something about the customer, you look in the CRM.

The main people who use a CRM are:

- salespeople who need to keep track of potential customers

- customer service staff who need to understand the history of a customer's dealings with the company

- managers who want to view reports to see how many new customers have signed up

Modules in Zoho CRM

**Modules in Zoho CRM**

In Zoho CRM, data is split up into multiple modules:

**Leads:**

These are potential customers who have not yet been "qualified". The customer may have filled out a form on the website or put their business card into a bowl to win a prize or been recommended. A large proportion of these people will not be in the target market for the business. Therefore, a salesperson needs to call these "Leads" to see if they are genuinely interested or if they're just "kicking the tyres".

**Contacts, Accounts and Deals:**

After the salesperson has spoken to the Lead and determined that they are interested, they will "convert" the lead. There is a button labelled "Convert" in every lead in the CRM. When the button is clicked, it creates a Contact (the person), an Account (the organisation the person works for) and a Deal (keeps track of the contract that the potential customer might sign up for). In a B2C (business to consumer) model, there might not be an account but generally CRMs are used for B2B (business to business) environments.

At this stage there is only one contact associated with the account but as the salesperson talks to more people at the account, they will add more contacts. It might be that the first person they talk to is a project manager but you need the CEO to sign off on any contracts. You'll want to add all relevant contacts to the CRM to help you understand who the decision makers are.

**Additional Deals**

Let's say you sign the first contract. The CRM is not done at that point. Generally you'll want to have long term customers where they keep on buying more and more. Do you create new accounts and contacts each time? No. Do you create a new Lead? No. You create a new Deal for these future sales opportunities.

**Stages in deals**

You're on a first date. After three pleasant hours together, you get down on one knee, produce a ring and propose. Is the other person going to say yes? Probably not. Likewise with sales. You're not going to get a cheque on the first meeting if it's a big deal. There will be multiple steps in the sales process. Zoho CRM incorporates this using "Stages". (Check out the video on stage probability mapping further on in the course).

**Quotes**

Typically one of the Deal stages will be "Send a quote". You can achieve that using the Quotes module in Zoho CRM.

**Sales Orders**

After a quote has been accepted, you convert it into a sales order and send it to the customer. Many small service-based businesses don't use sales orders. They'll just issue invoices. If you're dealing with big companies, they will expect a sales order.

**Purchase Orders**

In order to produce the goods/service, you may need to consume materials. To account for this, you will send purchase orders to your suppliers.

**Invoices**

Cash is king! To get the cash coming in, issue an invoice.

**Records in Zoho CRM**

A record is an entry in a particular module. E.g. if James Hawkins signs up via my website, the form will generate a Lead record in my CRM.

Section 3: Navigate the CRM