

Developing content for Cloud Computing, Assignment No. 2



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Compare and Contrast Cloud based CRM software

Salesforce.com Vs Zoho crm

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Abstract:-

This assignment deals with visualizing and analyzing the effectiveness in the usage of the applications of cloud based CRM that is Zoho and Salesforce on SAAS platform and also evaluate which application of CRM is suitable to which scale of companies. Analysis is also been done on the how CRM is integrated and also its developments are considered which are made on the CRM on the basis of the customer requirement. In this summary analysis has been done on the features of Zoho and Salesforce and their advantages keeping in mind of the enterprises and its potential customers. Analysis of the Zoho and Salesforce led to the conclusion of the suitable application of the Cloud based CRM.

Chapter 1 : Introduction

1.1 Background

Customer relationship management is a framework made to administrate customers and provide services to them. CRM is considered to increase the profits of the company and also increase its turnover anticipating its business contacts and also integrating these contacts with the suppliers, customers and business partners (Vaňková, 2011). CRM has not always been the cloud based software which companies rely for increasing their sales and gathering new customers. In the initial stages before the development of the CRM in 90s digital rolodex and other vendors such as Goldmine for efficient for the storage and managing the customer information throughout the 80s (crmswitch.com, 2013). The first step towards the development of CRM software was in the 90s. Initially Brock and few other innovators with the development of the control systems helped in the development of the contact management software and then towards the development of SFA (Salesforce Automation). The functionality of the contact management software and SFA were almost similar to the similarity to the functionality of CRM. However the name was not CRM initially, various other names like customer information systems and enterprise customer management were given however by the year 1995 finally the name was given as customer relationship management (CRM).

1.2 CRM and its present usage

Cloud based CRM is not only used for companies for being advantageous in terms of marketing but also provide services to its potential customers. According to the requirements of the businesses different solutions of CRM are provided by the cloud providers accordingly. CRM permits the organization to investigate the client information to accomplish best client administration and product delivery however earlier CRM is use to include in central databases comprising of hardware and system base however with the progression of the technology in the cloud, organizations are moving far from the hard areas of information and moving into cloud based arrangements which implies that the hard drive or the innovation won't be situated in an IT framework with which the information can just recovered or got to through a desktop anyway it can got to or recovered through the Cloud CRM by which the managers, directors and officials all together can handle the information with the help of real time. For managing the company's relationship with the customers Customer Relationship Management

is used as a strategy. It is also used for managing all of the company's relationships and interactions with the customers and managing its potential customers. CRM is used for helping the company in terms of profitability (Salesforce.com, 2014).

CRM is mainly comprised to the methodology regarding the business and marketing strategies helping the company to identify their potential customers and also maintain their customers according to the requirements of their customers. Long term benefits are achieved by the company with the help of maintaining the relationship with its potential customers (Vaňková, 2011). Information Technology look the CRM as a tool to deliver customer satisfaction with help of gathering their information and also with the help of the support tools for providing an excellence in customer experience (CRMforecast.com, 2014). CRM has been evolved from gathering customer information to maintain and manage their data and harness them so that interaction can be possible with the customers and improve their service in order to provide better customer satisfaction.

At the initial stages of the development of the CRM software few issues occurred. The usage fees of the CRM software was higher and the customers who were using the CRM was not completely satisfied with the ratio compared between the usage and the fees(ssworld.com, 2014). For the initial stages to the present stage CRM has grown from just being customer data storage system to being the efficient tool for the companies to manage and analyze its business data. With such evolution of the software now companies can maintain and manage the customer's data and analyze which customers can be the potential customers (ssworld.com, 2014).

1.3 - Suitability of CRM

Suitability of CRM is not standardized. That is standard rules has not been set up for designing the CRM and the warehouse which supports it as well. However the success and failure of the CRM is mainly based up the design of the warehouse which supports it. In the recent statistics shows that most of the CRM initiatives do not succeed due to the lack of appropriate selection of technologies used in for designing the warehouse (Hunter, 2009). This stats almost range to 50% to 80%, which makes the designers understand the importance of considering the CRM factors which effect the design of the warehouse and also analyze the classification of the CRM factors which determine the decision making in designing the warehouse.

Profitability of companies with CRM:-

With the help of the usage of SaaS CRM the companies offer advantages to the customers by offering them loyalty. Low cost entry and lower aggregate expense of proprietorship (TCO) - end of capital expenditure and reduction in IT salaries. Vested vendor interest - if the application use is not effective, the vendor loses the client revenue opportunity Much lower risk - quicker executions and outsourced ability significantly lower hazard. Few associations can match the infrastructure and security speculations made by SAAS vendors. Customer data is protected and only access is given to the teams working in the organization according to the role of the employee (preact.com, 2014). The feature of increase in lead generation helped in the complete storage of the data and maintaining the relationship

with the customers. Correct actions can be performed in order to protect accounts of the potential customers with the help of CRM.

Chapter 2: Salesforce

Salesforce is world's first and most popular cloud base crm system on SAAS platform with more than 82000 companies rely on salesforce including 100,000 + customers, currently it is in 16 different language with 82400 regular customer and over 210000 subscribers . Salesforce has edge over other cloud based crm available in the market due to its providing complete solutions for marketing, sales ,partner and community management .Salesforce is built on Cloud saas platform, due to low cost and low risk cloud based service to buy, that why it is affordable by many organization moreover it provide fast result because it drains resources on high value mainly focus on innovation to give optimum result to its customer.

Generally Salesforce is pay as you go option as different plans available for different level of organization according to their need and (Salesforce.com, 2014) Basically Salesforce is divided into 3 categories sales ,service and collaboration cloud ,here we are mainly focusing on Sales cloud as it deals with sales leads ,opportunities and quotes as well it helps in to keep track of sales activities with helping out in order to maintain long term relationship customer on regular basis.

Analyst cited that salesforce.com is classic example of disruptive strategy innovation – it is a new concept, new technology, best value proposition and alters the competitive landscape. It is cheaper, very easy to understand and provide the main stream offerings.

The main reason organization prefer salesforce cloud base crm over the other crm because it provide different type of applications like partner build on ERP , human oriented size ,internal and portal type of applications an long tail apps . This cloud base crm helps organization to integrate their data on salesforce and get result more effectively with keeping track of sales activities.

Salesforce.com cater to all range of customer from large scale to small scale business ,Salesforce.com has great strength in market because to have ability to serve companies of any size and to customize and integrate with their enterprise application.

The main differentiate factor in other words we can say edge over other cloud base crm, as from the starting to provide customer technologies into the business applications and they are able to do it faster than any other competitors. As salesforce mainly concentrate on large scale organization they have ability to cater small and medium businesses , according to a survey completed by CSO insights,51% of the organization do not use cloud based crm so it provide salesforce good opportunity to capture the market and keep expanding the Cloud base crm market. The salesforce is first cloud based company to cross annual revenue of \$1.1 Billion +, the salesforce.com is leader in cloud base crm saas platform.

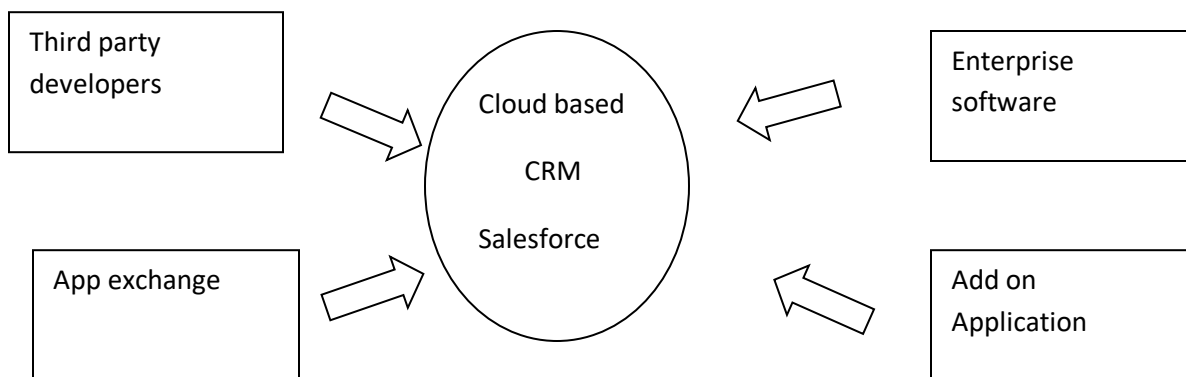
2.1 Functionality

The salesforce play a vital role in to manage the customer data in more effective manner in order to get a result basically salesforce.com offers primarily a demand crm. Salesforce.com is used for tracking the leads which help in to get optimum results in more effective manner, the sales process with social – listening and social media marketing tools to get connected to customer.

The main function of salesforce is to share resources in order to keep track of all the activities and keep update information to the customer on regular basis with efficient storage and computing. As the salesforce.com cloud based crm available in 16 languages and widespread availability across all geographical areas.

Business model of the salesforce explains the functionality of sales force in order to become world leader in cloud crm, they have develop programs with sales leader in order to manage the sales activities of the organization,as this is third party developers as well as salesforce provide add on application option as the customer can add on application with drive everything to app ,as salesforce helps the sales team to measure it progress through salesforce peter and pipeline.

Model



There are many other functionality of cloud based crm like account management which help in tracking all organization and companies you work with as well as sales activity tracking in order to take sales lead forward, even salesforce helps in conducting marketing campaign effectively which allows you to track your success rate on regular basis. Salesforce .com allows organization to add on application means collaboration tools if some organization need to add additional feature they can add it .Salesforce.com provide opportunity to maintain large chunk of data in more reliable and can do sales territory management ,as it allows to set a task for each individual automatically to the appropriate sales individual ,The question here is why salesforce.com cloud based crm on saas platform have edge over other crm available in the market the reason behind success of salesforce is due to its customer portfolio as well frequency of new product launches according to the market demand and requirement .

2.3 Methodology

CEO of Salesforce.com Marc Benioff, proclaimed in 1999 with advent of salesforce as the “End of software era”. Salesforce.com introduced saas in which customers have flexibility to purchase, install and maintain their business over the internet, the best part this methodology is cost saving instead of purchasing your own hardware and resources to maintain data.

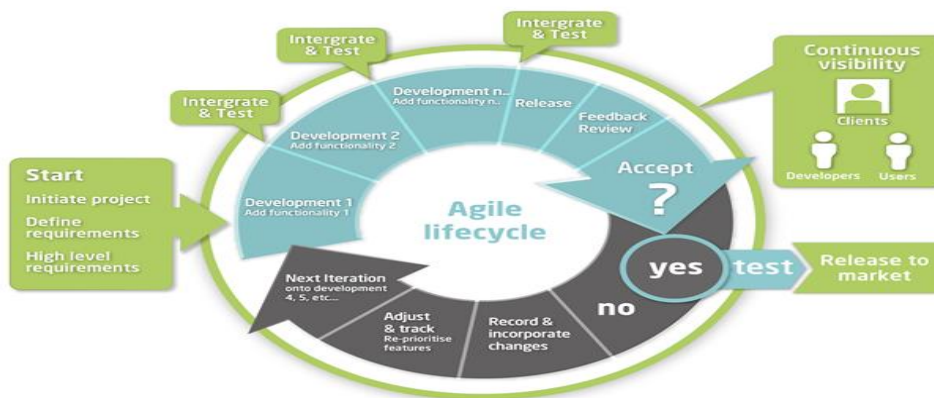
Salesforce started with traditional project management methodology means this method generally used in aerospace, construction etc where it is developed with largely disciplined, planning and execution is lengthy ,as the time passed the salesforce.com started out with waterfall development model as salesforce started with 15 people ,so when they need to released and upgrade every 4 weeks ,and it moved to 6 weeks , as time passed it moved to 4 times a year then it was once a year.

Peter Harris noticed a problem with waterfall approach as dead line or we can timeline were fixed and everybody were end up padding their estimates and still being late due to this every blamed quality assurance ,as it was end of the waterfall and everyone started pointing out each other as it caused weird behavior among people.

In 2006, when research and development ream grew up to 300 as many new people came from bigger companies like SAP with centralized approach towards software development.

2.3.1 Moving ahead with agile development methodology

Agile methodology basically required an owner, a scrum master and a scrum team members, in this people wanted to stay in particular over a time, so that working relationships fit each member and meetings are done on same location for every 15 minutes or its depend upon the manager, the main objective of these meeting are to “deliver fast means with in stated time and deliver early”



References - Volume 85, Issue 6, June 2012, Pages 1213–1221 Special Issue: Agile Development

In salesforce.com to get a result in more effective manner they divided the team into 30 scrum teams ,each team has 6 to 10 members ,the team has 45 minutes in order to discuss about the research and development with team member allow to speak as non-member had permission to attend but not to

speak. As agile methodology includes self-organized team as they member of the team know what is their role to play as well as dedicated resources are available to complete the whole cycle and if there is any problem with regards to prioritizing work then it solve the purpose of it. The best advantage of agile methodology is continues meeting and feedback form the team member and customer. Due to agile methodology the salesforce were able to eliminate the waste time, build quality in as well as people will be respected as roles are clear to each individual with just in time decisions easier to take with on time delivery and continuous innovation. In total we can say agile methodology give wings to sales force developer as it provide freedom to make changes whenever required.

Chapter 3: Reliability (Salesforce and Zoho)

Reliability in general is a stated condition for specific time period ,generally the customer have question like how cloud based crm on saas platform is reliable whether the company should trust these cloud crm companies .

Salesforce always built trust to their customer and well as they provide real time information system about its performance and security. The customer have to sign SLA (service level agreement) and it include terms and conditions which provide information about how salesforce would safeguard data and provide best security practices to the customer like disaster recovery plan are in place.

According to CRMExposed.com

“Salesforce.com does not offer a standard Service Level Agreement (SLA) within its contractual subscription. It seems that in most cases only Salesforce.com’s larger or more influential customers are able to secure contractual SLAs.

So, depending on the importance you place on application availability and uptime, it may be worth trying to determine from Salesforce.com exactly what commitments they are prepared to make before you sign the contract”.

Furthermore salesforce.com has provided users of enterprise edition and above, a real tracking mean mirroring service, these enterprise edition and above customers can access to weekly report.

3.1 Value proposition -

Salesforce.com and Zoho cloud based crm provide value proposition but it’s differ from each other.

In salesforce.com the mainly focuses on activity tracking as it provide opportunity for organization what sales staff actually doing, knowledge sharing is another important consideration where salesforce chatter collaboration tool allow to provide fast and direct knowledge sharing. In any organization coordination with people is very important so salesforce provides a feature of request a meeting which helps in to conduct coordinating with multiple people effectively.

Zoho helps small and medium enterprise to store their data and connects with popular business applications and result in visualization of data to create meaning full reports and dashboards.

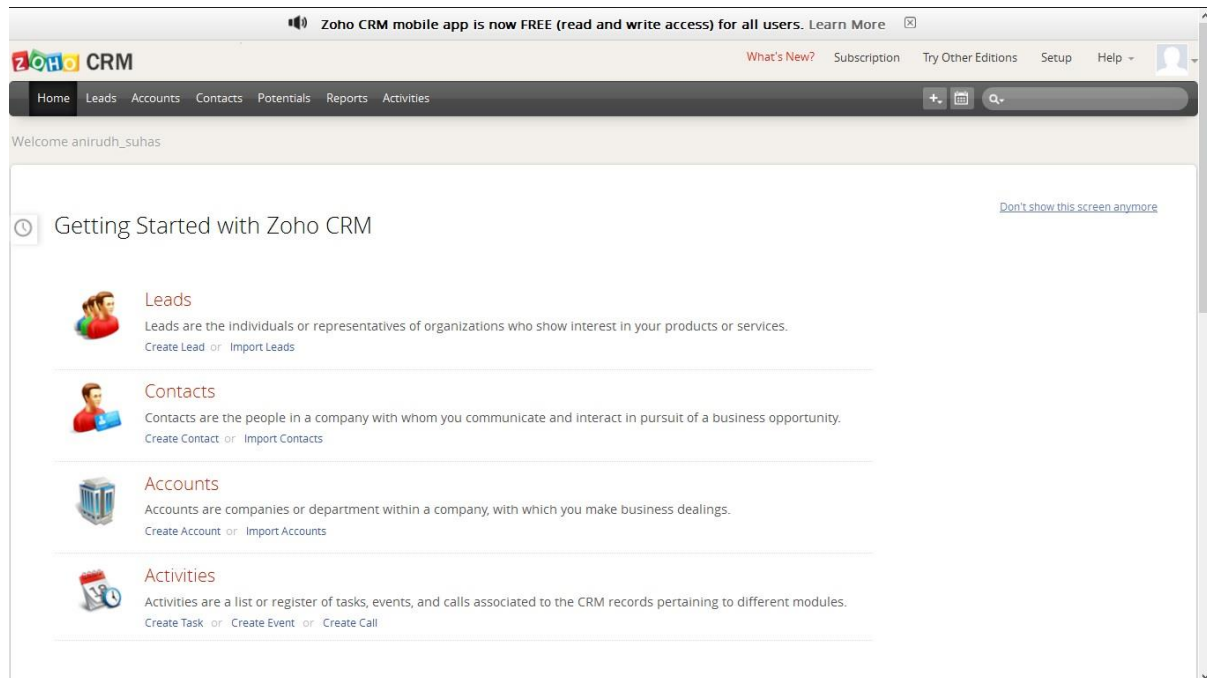
Chapter 4: ZOHO CRM

4.1 Introduction

Zoho CRM is cloud-based Customer Relationship Management (CRM) application software used for managing sales, marketing and service within one application. Zoho CRM is a SAAS solution which delivers complete CRM functionality with a price that is a fraction of the other offerings (Dhruvsoft, 2010). Zoho CRM within a single business system helps you to manage marketing, inventory management, email, complete sales of the business and also provide customer support and service (blinklist.com, 2013). It provides better customer relations and also manages the relations as it is an on-demand Customer Relationship Management (CRM).

Zoho CRM interface is very simple and gives a very ease of use for customers (Schaeffer, 2013). It is suitable for any type of business but it mainly targets on small and medium businesses. Through Zoho CRM we can manage all the contacts, leads, campaign, opportunities and service managements and also has mobile applications. This CRM is available in four separate editions and are easy to buy and provides simple upgrades for every edition (Schaeffer, 2013).

Zoho CRM is a fast and easy to deploy with no hardware and software installations required for it and it has a Pay-as-you-go solution and can upgrade or degrade their editions at any time (Dhruvsoft, 2010). Zoho looks like an older version of Salesforce that priced a low cost and facilitates with multilingual support (Shaw, 2013). For integrating CRM modules with third party applications ZOHO CRM provides Application Programming Interface (API). The third party applications may be accounting, E-commerce and self -service portals. With the help of ZOHO CRM API, CRM data can be extracted in XML or JSON format for developing new applications and also for integrating existing applications (CRM, 2014). Zoho CRM has the ability to create dynamic reports and we can use .CSV, excel, .PDF files that has adobe flash technology for creating dynamic charts. The Zoho has a very unique ability to access the CRM at any time and place through our mobile devices that supports iOS, Android and Blackberry through online or offline. This CRM has a two factor authentication process which provides additional protection to the customer (McCue, 2013).



(Figure 1, Source: <https://crm.zoho.com/crm/ShowHomePage.do>, 2014, Page: 1, Home Page)

Interface of Zoho CRM is designed so good that is very time saving where the customisation and setting up a workflow is simple to do and through automation software you can create assignment rules and workflows and business processes and tasks with an ease and it's a good feature in a long term usage. Zoho has more than 50,000 companies with 5 million users where 55% of customers in U.S and its headquarters located in California and 45% all around the globe mostly among the English speaking countries. In China it has been started as a Baihui CRM and is hosted locally in china by PC stars (Schaeffer, 2013).

4.1 : Functionalities of Zoho CRM

Zoho CRM is an 'on demand service' that gives whole control on application development and solution deployment. Zoho CRM helps to make web applications and deliver them quickly (kiwicrm.co.nz, 2012). Zoho CRM presents sales force, executives and management with refined operations, they are: lead generation & qualification, sales pipeline analysis, sales stage & probability analysis, competitor analysis, real time sales forecasting and many more facilities, which gives whole focus on the customer life cycle(lead generation, acquisition, conversion, retention, loyalty), hence this elevates revenue through sales (zoho.com, 2014)

Zoho CRM has separate leads, where each lead has a database of each individual potential prospect data which can retrieved anytime. These leads are often gathered from trade shows, seminars, advertisements and other marketing campaigns.

Lead management in Zoho CRM supports the efficiency to collaborate leads with another leads, converting leads to accounts, approving leads as qualified or creating lead assignment rules so that it will label leads to their designated places automatically although it occurs by importing the lead records to the system from other websites. In the CRM we can access dashboard that includes standard metrics of accounts, abundant sale opportunities with scheduled activities. Dashboard is well structured with very good graphical displays of patterns, trends and sales, metric comparisons and marketing and support. The graphics in the dashboard will be in two dimensional and three dimensional charts which are developed through adobe flash technology. Accounts, contact and activity management covers the fundamental quality data. Accounts grants parent-child task to signify accounts and other auxiliaries (Schaeffer, 2013).

The Potential management or the opportunity management of Zoho CRM gives whole view of the potentials and their related data like open activities, completed activities, sales stage history, products, contacts, attachments and notes. The potential management also records its related competitors through competitive analysis where it classifies rival company name, product name, product code, manufacturer, support and expiry dates, strength and weaknesses. Including competitor data at the potential record is a basic and supportive methodology. This competitive analysis feature is available for very few CRM merchants. Zoho CRM has a feature called Big Deal alert which gives an automated notification that relies on the potential records and arranged through Zoho workflow tool (Schaeffer, 2013).

Sale representatives performs their duty for creating quote for consumers and taking orders from them, Zoho sales force automation consists of quotes and sale order processing with integrated inventory management, pricing an item based on the customer analysis, providing discounts on line item and document and calculation of taxes. The sales pipeline and forecasting shows the basics of a report and also displays the compares between sales and percentage quota. In this report we can refine the closed amount, committed amount, best case amount and weighted pipeline amount (Schaeffer, 2013).

4.2 Marketing Automation:

Zoho CRM supports fundamental marketing management by identifying various attributes of campaign profiles, generating target list with account distribution, simple budgeting, broadcasting email distributions with email response metrics like open, click and bounce rates, merging mail and basic campaign reporting (Schaeffer, 2013). Campaign list is formed from the record sets of leads, contacts and potentials. Email documents can be designed from templates with rich text HTML editor that are present in Zoho CRM. By subscribing the CAN-SPAM act, users can make unsubscribe forms for opt-out responses. Marketing in Zoho CRM backs with multi distribution campaigns in parts by using auto responders. This method is very rare to the

regular marketing campaign way used by CRM vendors. We can schedule email distribution in advance with a 250 outbound emails limit for a day.

Web to lead form tool will transform website information into the leads database consequently utilizing either a favored leads function or assigning rules before the automating the leads to the sales resources. ROI reporting and fundamental variance analysis empower through campaign revenue forecasting and budgeting along with cost tracking. The profitability analyzer is very much valuable because it can analyze the revenue created by an individual client (softwareproviders.com, 2012). SAAS CRM software solutions do not focus on marketing software as much as sales force automation of Zoho CRM which has an enormous campaign tracking tool which is independent of marketing process automation (Schaeffer, 2013).

4.3 Customer Service:

Zoho CRM supports and provides these features case management, resource assignment, solutions lookup, incident escalation and customer service reporting. Incorporation in the middle of offers and post-deals help obviously helps inward groups in both divisions stay notified of client status while in the meantime giving data and automation to improve client fulfilment and advance cross-offering and up-offering open doors. Case entry is streamlined and constrained to the essentials along with stock identification and comment threading. Web to case form will help to create case automatically or through client emails in Microsoft outlook utilizing the Zoho CRM Outlook edition. The product inventory is unified to customer service, furthermore the product defect tracking, serial and lot tracking, warranty verification, service level agreement (SLA) compliance and return merchandise authorizations (RMA) can be obtained by customizing simple things in the software (Schaeffer, 2013).

Work flow tool is very helpful and flexible in configuring escalation rule. The knowledgebase tool is used for to learn and discover solution for frequent problems. In Zoho CRM knowledgebase tool has simple keywords based on titles, products and status and deliver records of related questions and answers. The Zoho Phone Bridge will help to connect multiple PBX systems like Asterix, Avaya, Elastix and Trixbox inside the CRM software that performs one-click dialing, log phone calls and associate calls with lead or contacts all inside CRM (Schaeffer, 2013).

Mobile CRM runs in iOS, Android and BlackBerry. In BlackBerry, Zoho CRM has to install locally as it integrated as local application. CRM in mobile has restricted sales force automation functions of leads, contact, accounts, potentials and tasks. Which can be viewed, create, edit and delete records and also we can make calls from CRM which records as an activity. In the

Android app it can support offline access to CRM where we can add or edit customer data and it gets updated and synced when it gets connected to internet (Schaeffer, 2013).

Business intelligence in Zoho CRM reports over 40 deliveries in sales, marketing, support and inventory modules with an option of modifying like cross-linking modules, arithmetic operations (aggregate functions such as sum, average, minimum and maximum), multiple types of layouts including matrix reports, 3-level column grouping, public/private folders, advanced scheduling of reports and permissions selection to deliver reports to intended users, including non-Zoho CRM users, through email. Zoho CRM has a reporting view called 'Pulse' which shows accounts, opportunities and other records as a timeline. We can distinguish the activity and non-activity for a user which is a good solution to recognize the decayed accounts and blockage in pipeline or processing of sales (Schaeffer, 2013).

4.4 Methodology:

Zoho CRM follows the traditional methodology called **Zoho Projects**. This project management tool gives an edge that delivers projects that includes features, timesheet and doc uploads from cloud services (zohoproject, 2013).

With the Task Management we can plan projects and assign tasks, ownership and priorities by using features that organize projects. With the Time tracking Software we can record working hours and you can send invoices of payments to the clients by exporting data with quick generation of reports. We can also schedule our meetings, create notes, post links within Zoho calendar. Zoho projects have been collided with wiki interface, which is quick in navigating and to create pages and publish them. The documents can be stored and can tag for tracking them in history. Bug tracking software has dual way to make clear image of issues arised with flexible workflows and set business rules that helps fix bugs which is simple with an ease of access. Project reports or Gantt Charts, we can track the reports and also measure time taken for the tasks done for the clients. There's an in-built chat room where everyone are allowed to discuss about their projects, important topics and can take decisions about them. All these will be occurred in the browser itself (ddm.ie, 2012).

Chapter 5: Comparison of Salesforce and Zoho crm

The following analysis shows a brief differentiation between the Salesforce and Zoho by comparing its various functionalities such as editions, sales pipelines, opportunities, dashboards and many more are factors are shown below.

5.1 Editions

Zoho is always been considered as inexpensive however its considered to be on-demand software and is basically designed for the companies which has an intermediate and basic usage. Zoho also visually looks like an previous versions of Salesforce. Zoho has editions like which are inexperienced however has strong multi language features and for the first time in 2011 Zoho CRM was introduced Magic quadrant for Salesforce automation (Shaw, 2013).

When compared to salesforce there are limitations to up to only 5 users' maximum for the Group edition. Other than the limitations in the number of users Salesforce is also considered to be costly. Other than these defaults there are a lot of limited features and also hidden costs.

5.2 Mail merge

Mail merge is easier in Zoho when compared with Salesforce. Through Zoho writer available mail merging is possible and also templates in order to merge the mail can be loaded from various documents such as Word or Google docs.

Mail merging is not always an easy task in Salesforce various steps have to be followed in order to merge the mail. Extended mail merging capabilities are also available in the Salesforce however it has to be activated by contacting the customer support team which in turn shows a lot of limitations.

5.3 Opportunities

Opportunities are considered to be pipelines in Zoho. The potentials in Zoho can either be imported from an external source or also created internally. The structure potentials in Zoho is similar to the structure of contacts and accounts.

When compared to the Salesforce the quoting function is only available in the editions which are of Enterprise Editions and higher and other than the cost inefficiency even the contact catalog has also an extra pricing in the Profession edition (Shaw, 2013).

5.4 Sales pipeline

With Zoho CRM it is easy to create sales funnels. By the creation of the sales funnels it is easy for the companies to determine their potentials customers and also their win or loss rates. Sales can be predicted with the help of sales funnels and increase the areas in which the sales performance can be increased (Zoho.com, 2014).

Whereas in Salesforce it has a limited methodology in the areas of sales and some features are also are restricted (Shaw, 2013). Companies have to purchase sales methodology from Salesforce APPEXchange in order to perform some changes on the stage names or percentages and also individual stages.

5.5 Dashboards:-

In Zoho the dashboards can be customized however the customized options are limited with relation with the editions. These dashboards can be edited and customized however filtration is not possible.

Different options are available in different editions in Salesforce for example Group and Contact manager editions customization of dashboards.

5.6 Mobile and Offline availability:-

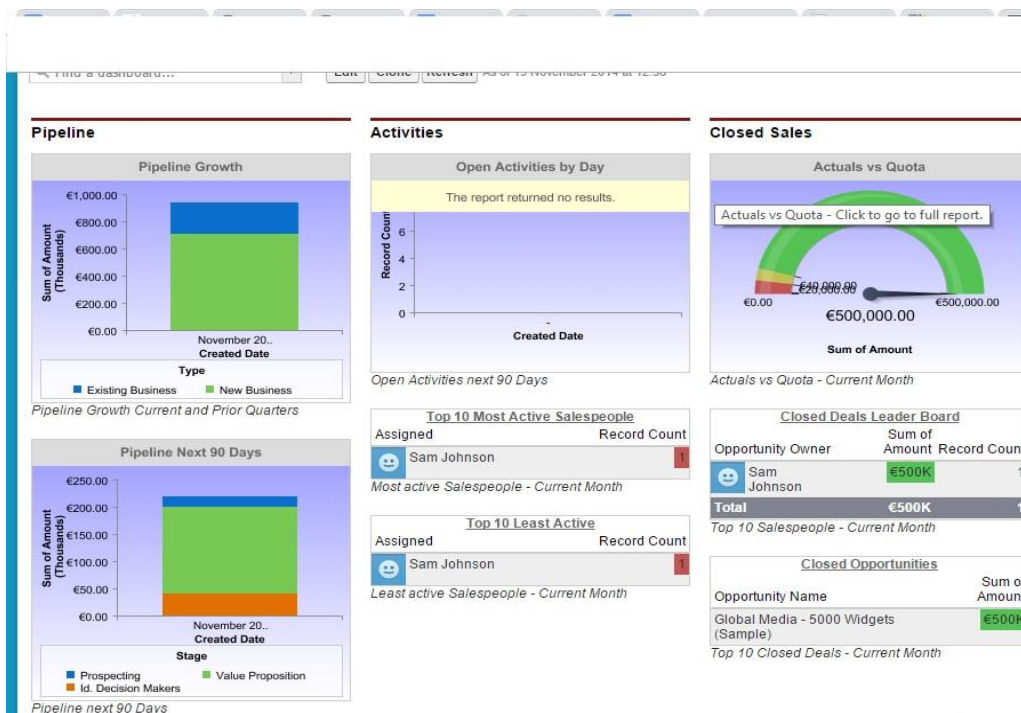
In Enterprise edition offline access is available in Zoho and there is an option as paying an extra cost for the Free and the Professional editions.

Salesforce only provides limited accessibility in most of its editions and the full accessibility is of high cost.

Chapter 6: Findings

6.1 Salesforce:-

Below this is an example of the dashboards which we have retrieved due to the contact information generated. As it can be understood clearly from the below diagram that in the Salesforce provides a clear understanding of the leads visually which in turn helps the sales representatives to understand and analyze the performance of the company in yearly and quarterly basis according to the target set by the organization.



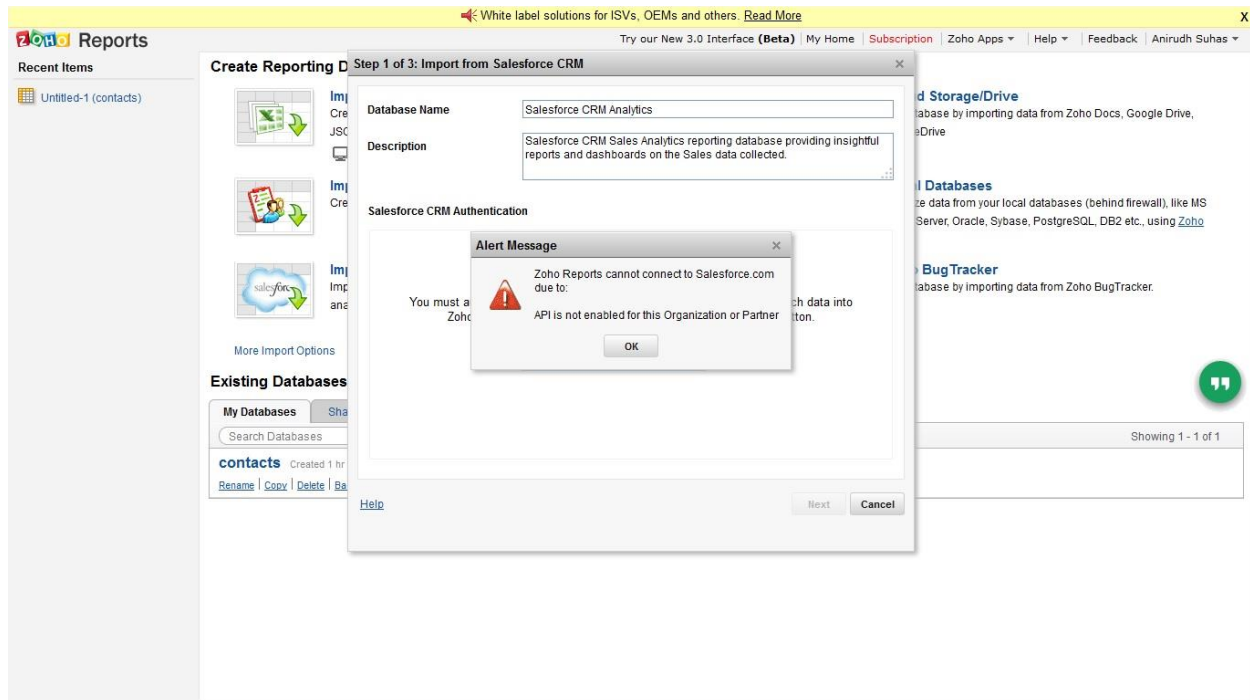
(Source: <https://eu5.salesforce.com/01Z24000000HImX>)

In any organization the leads are classified into three parts **hot leads** which means the gather has been done by which the proposal can be exchanged between the organization and the potential customers. **Warm leads** determine that the organization has just contacted the potential customer to have an official arrangements in order to exchange proposals and it also means that there is a requirement in the future not in the present stage. **Cold leads** means that the initial contact has only been initiated however further contacts will be done in the future.

Salesforce also provides chatterbox by which the sales managers and the representatives can interact on regular basis with the customer in order to gain more information to increase the revenue of the organization. Salesforce application add-on can be provided according to the requirements of the organization and also provide third party developer option which is the main reason Salesforce is the leading in the cloud based CRM.

6.2 Zoho

Zoho is another other type of CRM which mainly focuses on the companies which are of small size in terms of revenue and sales. The dashboards are available in the Zoho CRM however the account used for the research and analysis does not comprise the option of dashboard however it comprises in the higher editions. Zoho interface is simpler in terms of usage and can be understood by the users who are not so fluent in the technologies which in turn helps the organizations in saving the costs of training. Project management and the lead generation is simple in the interface of the Zoho and it is inexpensive when compared to most of the cloud CRM applications. Zoho has its own dash page and it can be synchronized with the Zoho however with the edition available in this research was not that efficient.



(Source: - <https://reports.zoho.com/ZDBHome.cc>)

The leads were generated through the contact information generated from **lead411**, **hoovers** and **jigsaw** which was the same source as Salesforce. Mass email is efficient in Zoho when compared to that of the Salesforce. The above reference shows an error because of the non-synchronization of the API.

6.3 Data Collection

The data has been collected from the **Lead411**, **Jigsaw** and **Hoovers** are the same data collected for Zoho and Salesforce in this research. The Leads generated comprises of ten different companies and the parameters in which they are classified are given below

Name of the Company	Company Sector	Designation	Name of the Decision maker	Revenue of the company	Lead Status
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The parameters which has been step for Zoho and Salesforce to analyze the potential customers from the contact information retrieved. By considering the above parameters retrieved analysis has been performed on the functionality of Zoho and Salesforce.

6.4 Data Analysis

There are two approaches in which the data can be collected for the lead generation in Zoho Salesforce. We have used **Lead411**, **Jigsaw** and **Hoovers**, we have also taken 10 different companies for the lead generation in Zoho and Salesforce. Different parameters have been considered in the lead generation like prospectus of the employees and the sale of the organization. The type of the organization is also considered in this parameters.

In **Lead411**, **Jigsaw** and **Hoovers** contact information can be retrieved according to the requirements of the company. By this contact information leads can be generated and the potential customer can be identified in order to increase the sale of the company (lead411.com, 2014).

Chapter 7: Reports

The data which has been collected and generated both in Salesforce and Zoho it is found that both functionality of both the CRMs are completely different from each other. Zoho CRM is very much suitable for Small and Medium businesses. It mainly manages their information and be productive when in office or anywhere through mobile, without worrying about expenses and outdated hardware or software. The Sales force does not require any updates as it is application as it update itself. As Salesforce is an application and runs on cloud server however there are times Salesforce is not accessible due to the cost. CRM industry is coming in to play in the cloud technologies with Sales force and ZOHO however Cloud technologies have its own benefits which helps the middle sized business are hoping to get an advantage in the host technology which in turn helps in their infrastructure and also the providers helps the businesses in maintaining the data.

Conclusion

During this process of research and the analysis done, it clearly shows that salesforce and Zoho are the best cloud based CRM on SaaS platform. Sales force and Zoho differentiate in their functionalities and the target audience as well as we have understood the different aspects of the Zoho and Salesforce as well as its competitors which make these CRM more efficient than other services. Salesforce.com has got a barrier for adoption means even though it is cheap as it does not require any cost but it is possible that the cost of integrating can exceed the costs of the software itself. Sometimes difficulties in the transition of the transactions have to go through multiple screens to process it further. As there are times Salesforce.com is not accessible. It has got barrier to adoption means even though it is cheap as it does not require any cost but it is possible that the cost of integrating can exceed the costs of the software itself as well as Marketing management functionality is limited due to this it involves additional costs and vendor management. There is no service level agreement in standard contract moreover simple user interface quickly outgrown by experience users. As new user it is little difficult to understand accustom yourself with Salesforce.com.com. For us the main barrier would be to get subscription of Zoho and Salesforce.com and to communicate with companies of various verticals to understand their outlook on Salesforce.com and how it is effective contributing towards organization strategies. CRM modules provide integration with third party applications Zoho CRM to provide Application Programming Interface (API). The third party applications may be accounting, E-commerce and self -service portals. With the help of Zoho CRM API CRM data can be extracted in XML or JSON format for developing new applications and also for integrating existing applications. Any applications can be developed in any programming language such as Java, C, C++, PHP and many more with the help Zoho CRM API as it is independent of programming language. By the above research we have a clear understanding that Zoho CRM is very much suitable for Small and Medium businesses and Salesforce is suitable for large enterprises.

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