Zoho CRM

Getting started with **Zoho CRM** for Everyone

ZOHO

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Why do you need a
CRM for Everyone?

The ultimate goal of every business is to achieve customer delight—and achieving customer delight cannot happen with the effort of a single person or function. It is often the result of the collaboration of sales teams with several other departments. While sales teams are the champions that lead customer conversations and make the tough negotiations with prospects, in order for timely and successful wins, they need to be enabled by several other teams, such as the pre-sales solution experts team for implementation consulting, the legal team to put a contract together on time, or the marketing team that brings out convincing case studies.

The ultimate clinching of a business deal is the result of the cumulative efforts of multiple minds. So, if several teams have a stake in business performance, have deliverables that they must bring to the table, and the responsibility of promoting customer delight is entrusted across teams, then why shouldn't the power and access to efficient systems be awarded to every team that enables sales and works with the customer?

Presenting **CRM for Everyone** — a truly democratic approach to managing a CRM, gift-wrapped in an exciting and intuitive user interface! Here, multiple teams across an organization can find their place in the CRM, assume power to devise their own processes and functions, and seamlessly collaborate among other teams to meet a singular objective — **delight their customers every day.**

How it works

In the current-day CRM, the sole authority of setting up the processes for all teams rests with the central admins (understandably, because they need to ensure data privacy, maintain order in the system, among other priorities). The challenge with this is that the dependency on admins could also cause internal process delays, and this could ultimately impact customer experience. To the customer, ultimately we are all a single company though internally there are several teams.

In CRM for Everyone, this challenge is addressed from two angles — **the empowerment of** these customer facing teams to set up and take care of their processes, and the improvement of **coordination** among them to accelerate processes— thereby maximizing customer experience.
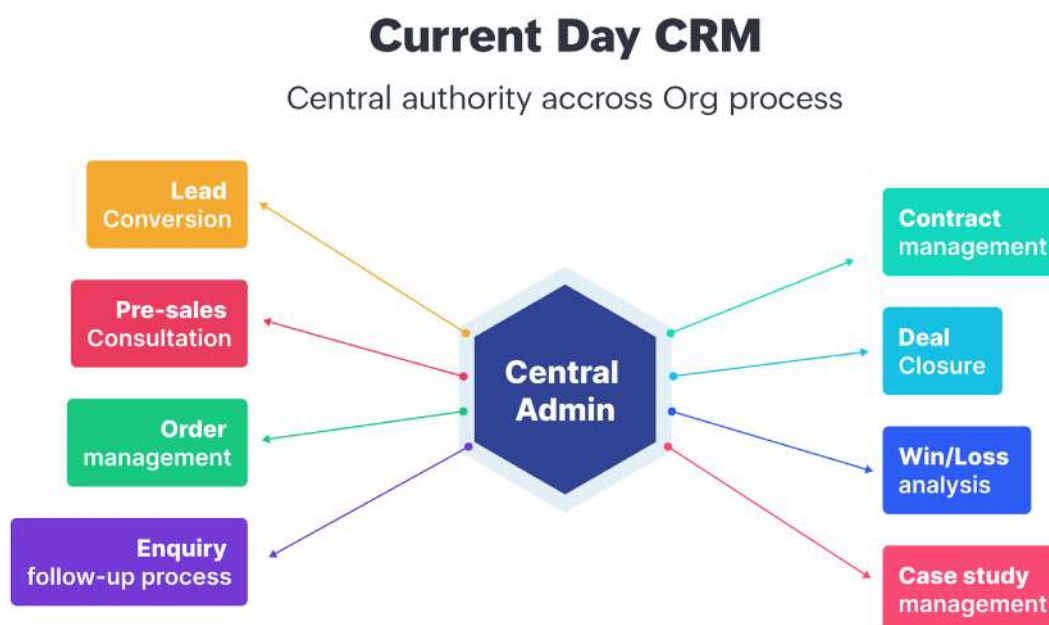
Empowering teams: Today, it is possible to bring all customer-facing teams to CRM and enable them to manage their processes with the introduction of **Team Module.**
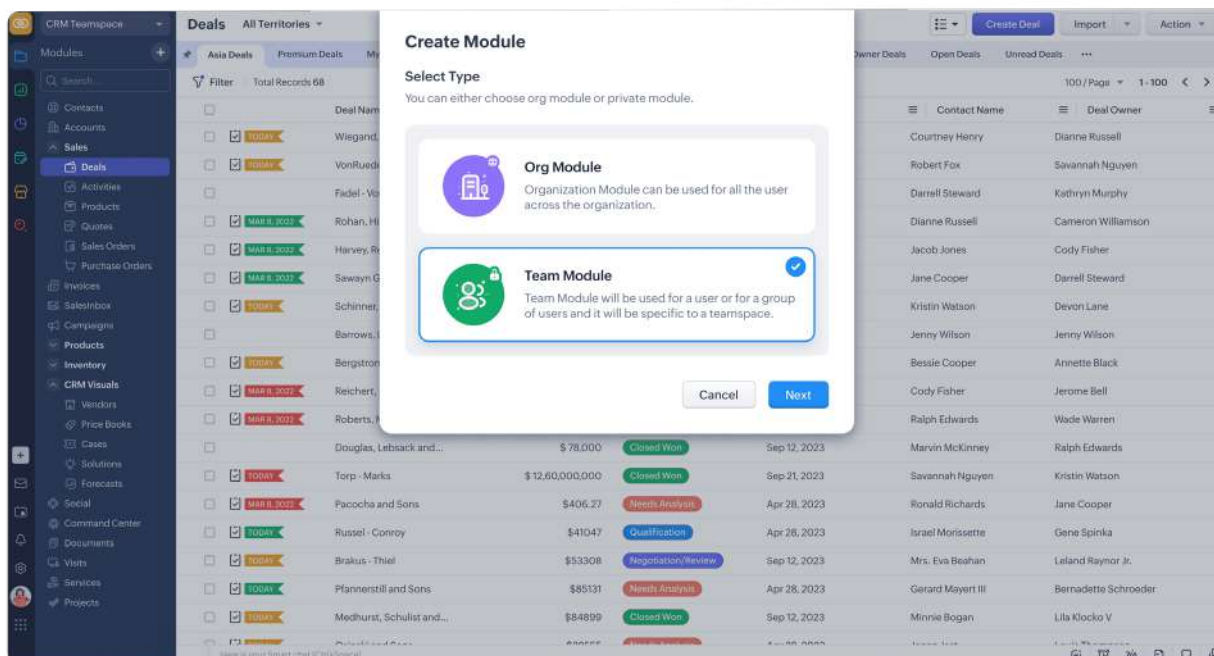
While a central admin will certainly continue to operate at the highest level to take care of org-wide priorities, there could be several team-admins who could set up their own modules and processes.

CRM for Everyone
Organized and decentralised way of managing org process
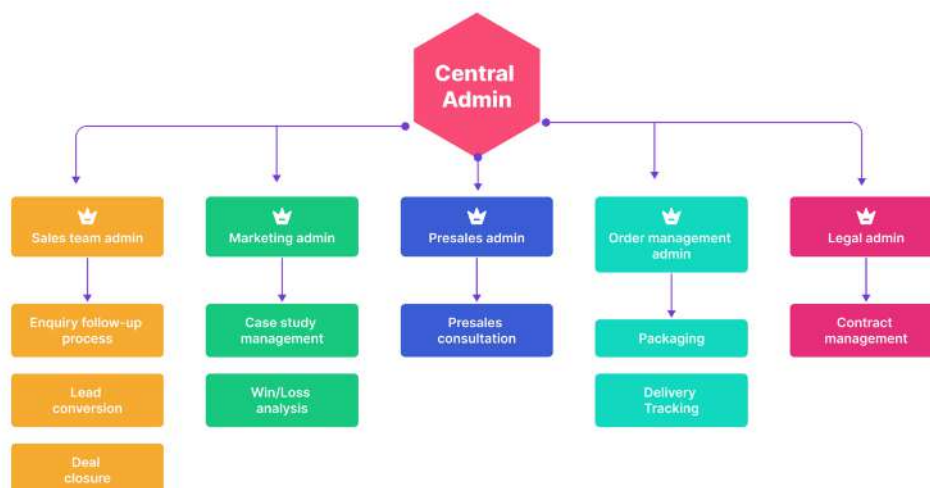
Improving coordination with Requests

Sales is often a well-coordinated effort between multiple teams.

One team's output could be another team's input and vice versa.

This is much like running a relay race, where one team passes the baton to the next until the race is won. In many cases, this "passing the baton" happens outside of the CRM system—most likely a chat interface or email, which could lead to a disconnect in operations, duplication of efforts, and often chaos.


This communication essentially connects business functions and helps teams trace the dependency and progress between their activities and deliverables.

It should be captured in the first place, and captured within the CRM system in the context of customer data and not be left outside the CRM.
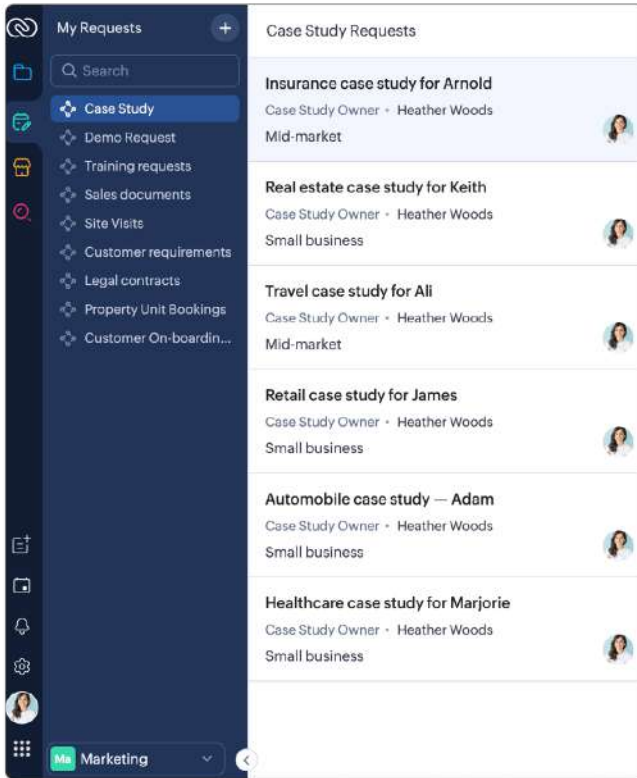
Team Module addresses this challenge by making team coordination a seamless part of the user interface because it is very much woven into the business process. This is enabled by what we call **Requests.**

Each team could register a need for a deliverable from another team in order to move ahead in the process by raising what we call a **"request".**
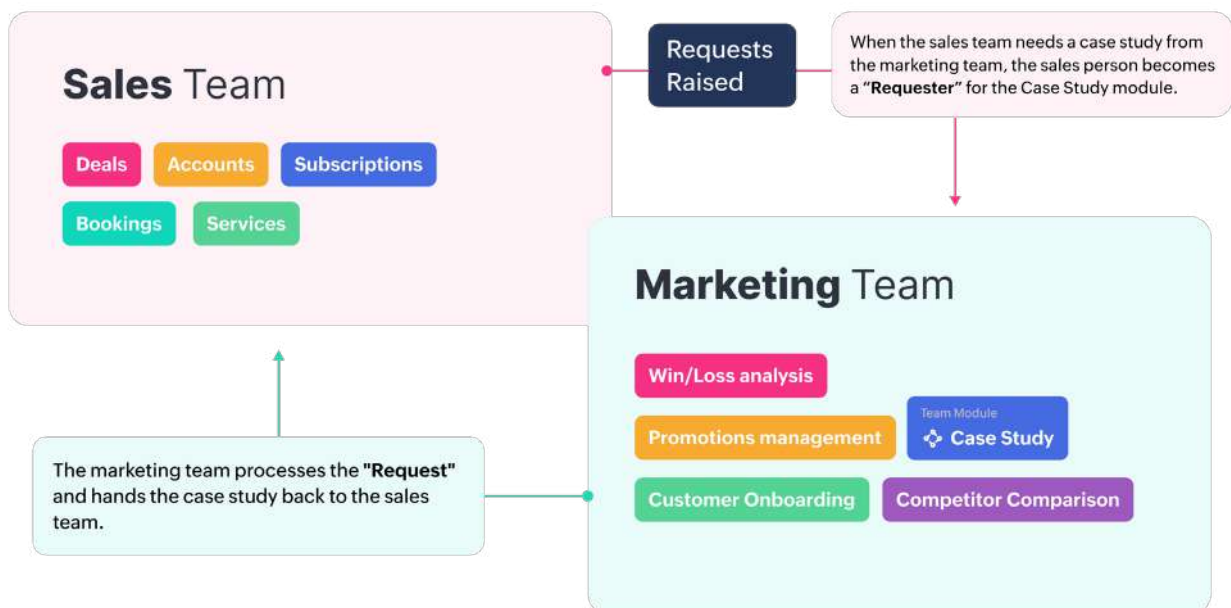
They can keep a track of their requests and progress on them from the Requests tab, without being privy to their other teams' internal operations.

Team Module also packs in an easy interface to manage access controls for the right people, thereby enabling you to maintain data privacy and integrity.

View

Edit

Read Only

Read / Write

Don't Show

Delete

With Team Module, bring all your customer facing teams on board CRM, enjoy the benefits of truly connected teams, beat communication silos, improve adoption, and empower teams without compromising on privacy.

How CRM for Everyone Works

Before learning a few use cases on how CRM for Everyone works, let's understand a couple of primary features that enable Zoho CRM to become a **CRM for Everyone.** They are— **Team Module and Teamspace.**

Team Module

A Team Module is a user-controlled module in Zoho CRM that is designed to help different customer-facing teams in an organization set up their processes and coordinate among themselves seamlessly on the same platform. With the advent of Team Modules,

- multiple customer facing teams can be onboarded to CRM.

- each of these teams can be empowered to configure their processes and manage data in spaces dedicated for them.

- each team will have a dedicated Team Module admin, who will be responsible for setting up processes and overseeing the operations of that team.

Teamspace

A Teamspace is a dedicated work management area for every team. The moment multiple teams come onboard the CRM, the system needs a mechanism to enable order — lest things get chaotic. A Teamspace is a folder-like space where all the modules relevant for a team are organized. This could be a combination of Organization modules and Team Modules.

Note: With the advent of Team Module, there are now two types of modules that you can create in Zoho CRM.

- **Organization module**
  Modules available by default across the users of an organization. These modules are ideal to store customer data, such as Leads, Contacts, Accounts, Deals and Vendors. You could have default or custom organization modules.

- **Team Module**
  Team Modules are specific to a team by default. This is meant to run the process of a particular team and are accessible those team members in different capacities based on their role in the process. **For example,** Pre-sales demo requests, Legal Contracts and Comparison documents could be some Team Modules.

Team Module	Organization module
Specific to a particular team by default	Common to all organization users by default
Ideal to implement workflows and processes of each team.	Ideal to store and maintain customer and sales data.
Ex: Onboarding, User Education and Training processes.	Ex: Leads, Contacts, Accounts and Deals.

Team Modules Vs Teamspaces — How they fit in together
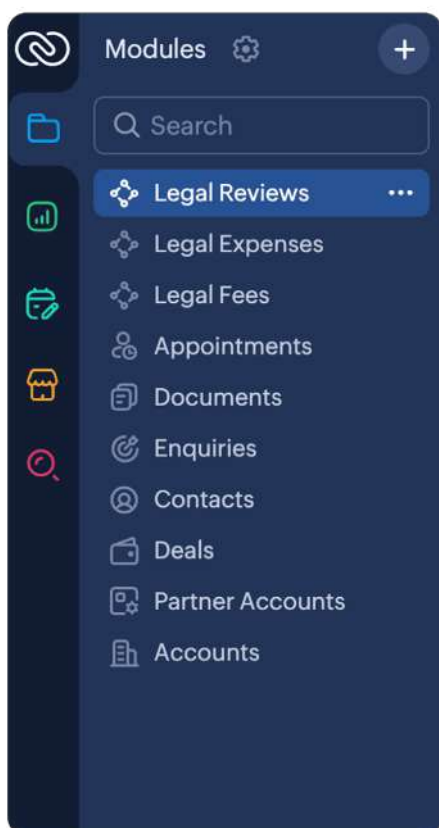
Let's assume that a team called Legal Team is onboarded to CRM. They have about 20 members, each with a different set of responsibilities. They could all be part of a Legal Teamspace where all modules relevant to their team are organized.

They have 5-10 processes — such as Document Management, Contract Signing, NDA review and so on. Each of these could be a Team Module. Out of these 20 people, 5 are involved in Document Review. So a Team Module called Document Review could be created with only these 5 members.

There could be 10 members involved in Legal Expenses — so this could be a Team Module with these 10 members alone. There could be overlaps, of course, the same member could be part of multiple Team Modules — or not — based on their role in the company. This could be set up based on needs— just note that this flexibility is available.

So a Legal Teamspace could also have Leads, Contacts, Accounts, Deals, Activities, NDA Review, Document Management, Legal Expenses, Legal Fees, Contract Signing modules— while the organization modules are relevant to supply business context to the Legal team, and Team Modules help them manage their specific work items within the same system that has the business context.

This way, Teamspaces is a dedicated area that enables work management for teams, whereas Team Modules help these teams set up and manage their own processes and coordinate among each other to accelerate overall business goals.

Team Module- A setup to implement a specific process in a team.
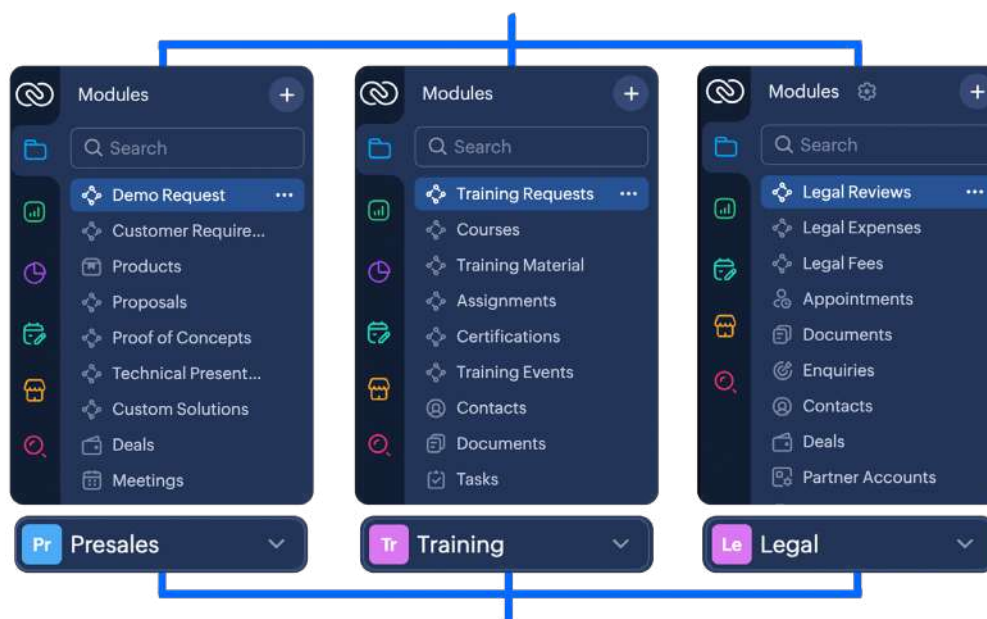
Teamspace- Dedicated work area that consolidates all modules relevant to a team.

CRM for Everyone — Use cases (How it works)

Let's understand how Team Modules work to make Zoho CRM a CRM for Everyone with the help of two use cases — a software company and a real estate company.

Use cases 1: Zylker Tech

Zylker Tech sells business software. Their sales team often requires the help of Presales, Marketing, and Training teams to close and retain a deal.

Each team has processes specific to that team:
For example, the Marketing team has to run ad campaigns, process sales enablement and content management activities. Presales teams process demo requests. The training team deploys trainers to the customer's organization to train their workforce. With Team Modules, all these teams can seamlessly coordinate with one another on CRM, without having to switch back and forth between email and chat platforms. Moreover, they can manage their modules on their own in CRM.

Amelia Burrows is the Super Admin of Zylker Tech. She makes Heather Woods, a senior sales manager, the Team Module admin of the Sales modules.
Now Heather wants to follow up with a deal. At the value proposition stage, she needs the help of the marketing team to offer her relevant competitor comparison documents.

Process requirement

Value Proposition

Needs competitor comparison documents from the Marketing team

Heather Woods
Sales agent

Action in CRM

Heather raises a **"Request"** to the Marketing Team module.

So she simply logs into her account, navigates to the "My Requests tab", goes to the Competitor Analysis Team Module and places a "Request" directly to the Marketing team instead of leaving them a message or sending an email. The final result of that message or email is for the Marketing team to create that work item and record at the end of the day. So why wait? Directly create a request and let it be processed.
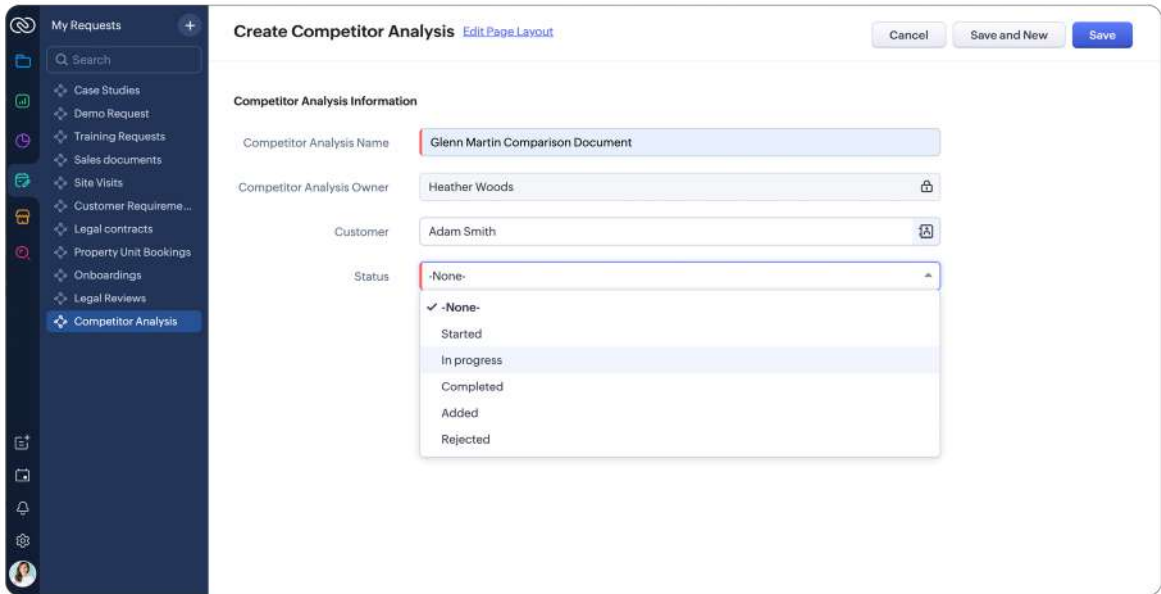
Now the marketing team agent Tai Chang receives this request.

She logs into her account, navigates to the Marketing Teamspace where her Team Module is, goes to the Competitor Analysis module, finds the request from Heather, takes it up, processes it and attaches the comparison docs to the same record. This way, she has now fulfilled this request.
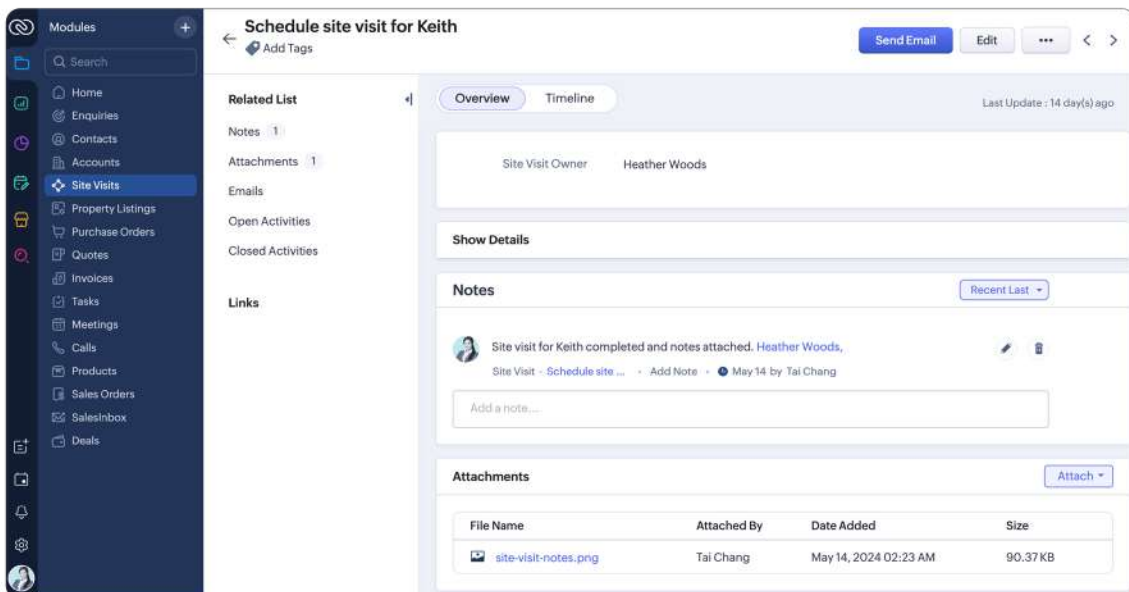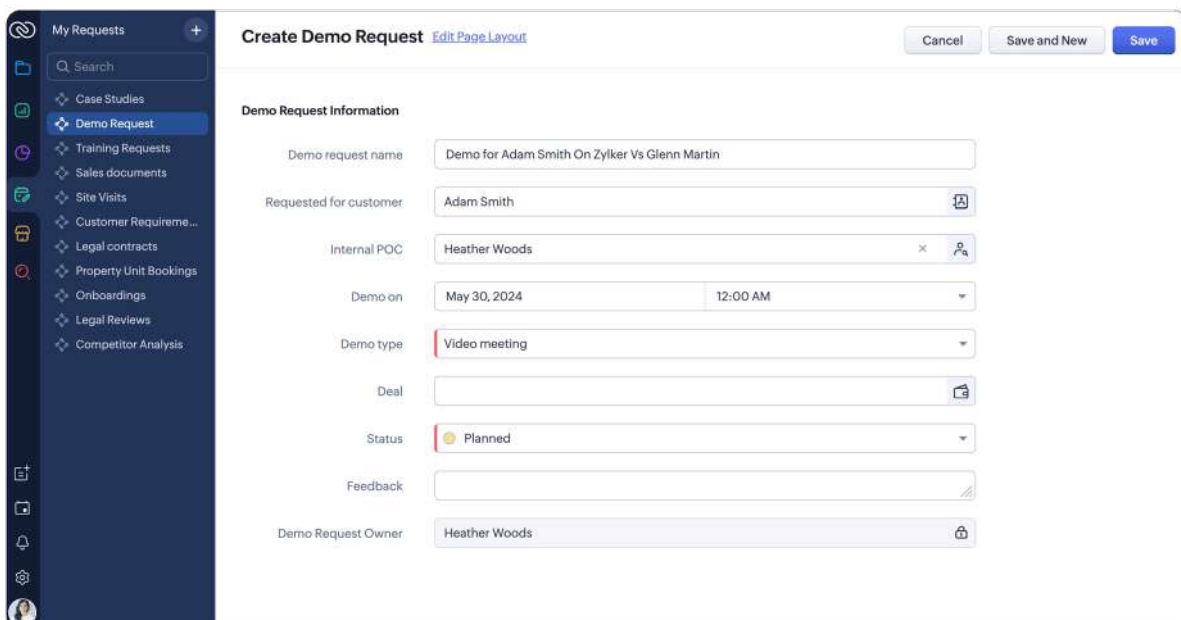
After scanning the comparison docs, the customer wants to proceed to the next stage, —that is, they would like to have a product demo.

Process requirement

Presales

Schedule a product demo for a customer

Heather Woods
Sales agent

Action in CRM

Heather raises a
"Request" to the
Demo Requests
Team module
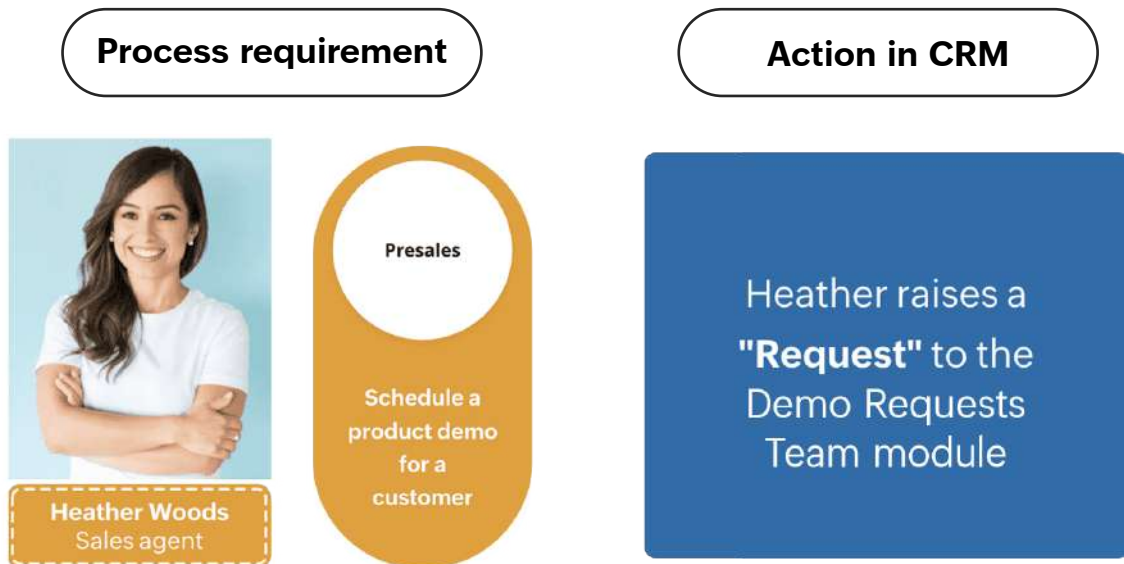
Heather now places a Demo request to the Presales Demo Requests module.

Martha, the presales team agent, finds the request, processes it, and hands the details back to Heather.

Similarly, Heather can request an NDA review from Raghav, a Training session from Priya Raman and similar other processes can be kicked off right inside the CRM system.
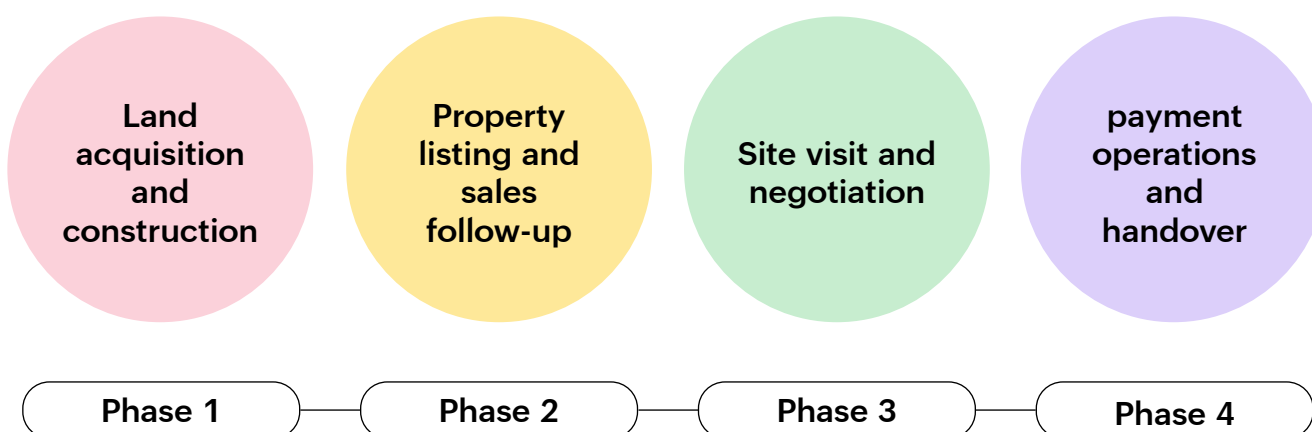
While all of these different records exist in multiple Team Modules, they are all connected to the same customer or deal for context.
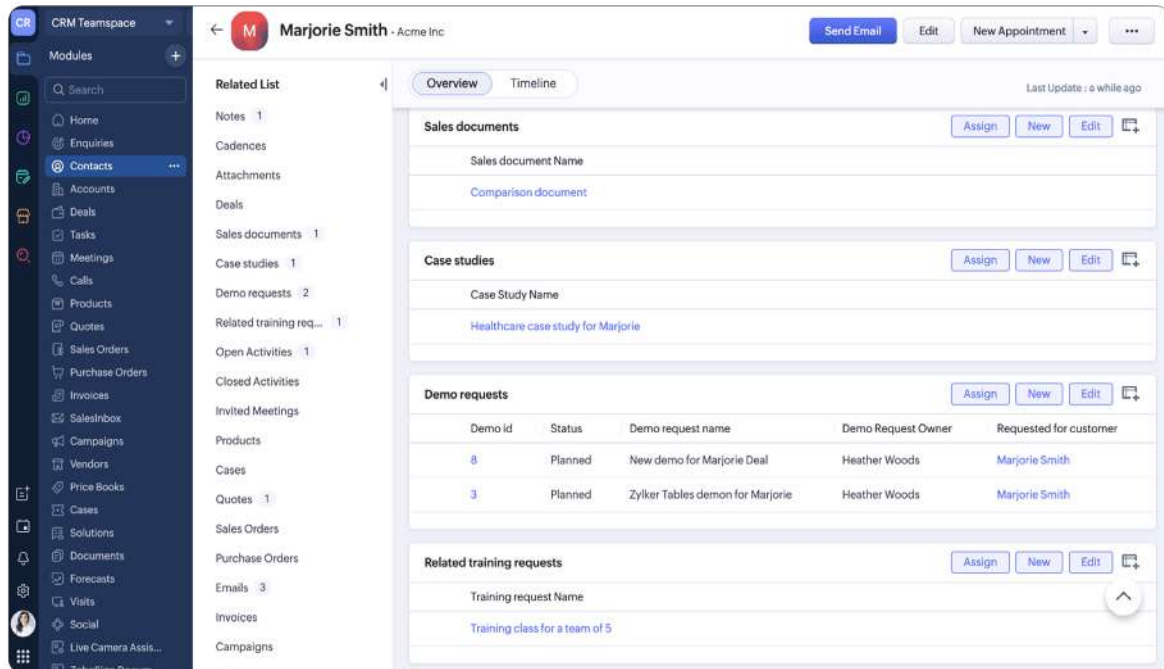
Use case 2: Real estate

Zylker Properties is a real estate development company. They acquire land for construction, raise residential buildings such as apartments and villas, list them and sell them to home buyers.

Land acquisition and construction

Property listing and sales follow-up

Site visit and negotiation

payment operations and handover

Phase 1 — Phase 2 — Phase 3 — Phase 4

They use Zoho CRM to take care of their property management needs. They have multiple teams — a land acquisition team to take care of acquiring the right type of land for construction, legal and liaison teams to take care of document management, and a project management team to design and execute the construction project.

Land acquisition	Land purchase	Legal	Liaison	Project management
Sales	Property listing	Pre-sales	Lead follow-up and conversion
Site visit	Site visit	Quotation	Negotiation
Operations	Unit booking	Payment operations	Key handover

Similarly, there is a sales team to list and promote the completed residential units. A pre-sales team gathers requirements of incoming leads and helps the sales team understand what they are looking for. The sales team then arranges property viewing for the leads interested — the site visit executive manages this and updates the sales teams of the outcome. The sales teams follow up to then negotiate the deal. Once the property is finalized, the advance booking is done and payment operations are initiated. Finally, after all the legal paperwork and payment processing, they key handover team comes in and completes the sale of the house.

So as you can see, right from procurement of land to construction, to listing, promoting, and site visits to key handover, multiple teams come in to do their bit of a huge process, pass the baton to the next team in order to take the customer through the entire buying journey.

Many a time, while the process happens in the CRM, the coordination happens outside this system. With Team Module, you can ensure that all the customer facing teams that enable sales to engage with the customer are all brought into the same system— this way, the process and the people are integrated in the same system and achieve customer context through their activities.

Let's see how the implementation of Team Module helps Zylker Properties.

Let's assume that Zylker has acquired the right land and completed the construction of spacious apartments and villas. They have now listed them on real estate websites, and leads have started coming into CRM.

Amelia Burrows, the Super Admin at Zylker has made Heather Woods the Team Module Admin of the Sales team. Heather has to approach Martha Hills from Pre-sales to help gather a lead's requirements. Up until now, Zylker's pre-sales team and site visit teams were not part of the CRM account — so Heather would look up the customer details on CRM copy key information and drop an email with this info to Martha. Martha would then gather requirements and then pass them to Heather via email.

You see the gap in this process— while Martha has a part to play in the sales process, Martha's work is not managed in the CRM. Similarly, there could be other teams such as legal, site visit teams whose work is needed for the deal closure, but is not managed in the CRM. This is where Team Module helps.

With the implementation of Team Module, this work management can happen inside the CRM itself by means of what we call Requests. While multiple teams can continue to run their processes in their own dedicated space, Requests are the thread that connects them together to promote coordination among them. With Requests, you connect teams, while at the same time continue to give them their space. Let's see how this works.

Heather logs into her account. She navigates to the "My requests" tab. This is where all her requests are created and tracked. As a "Requester" she can request deliverables from other teams— such as Presales, Legal and Site Visits teams. She is not part of the day to day activities of those teams, nor is she privy to their records. She cannot see their data— however she can request work from them in the context of her customers.

In our example, she can go to My Requests > Customer Requirements module and place a request for Martha to gather the requirements of a selected lead. This is equal to the email she drops in otherwise, just that this is a whole lot better, as this happens in the same system and supplies much-needed customer context.
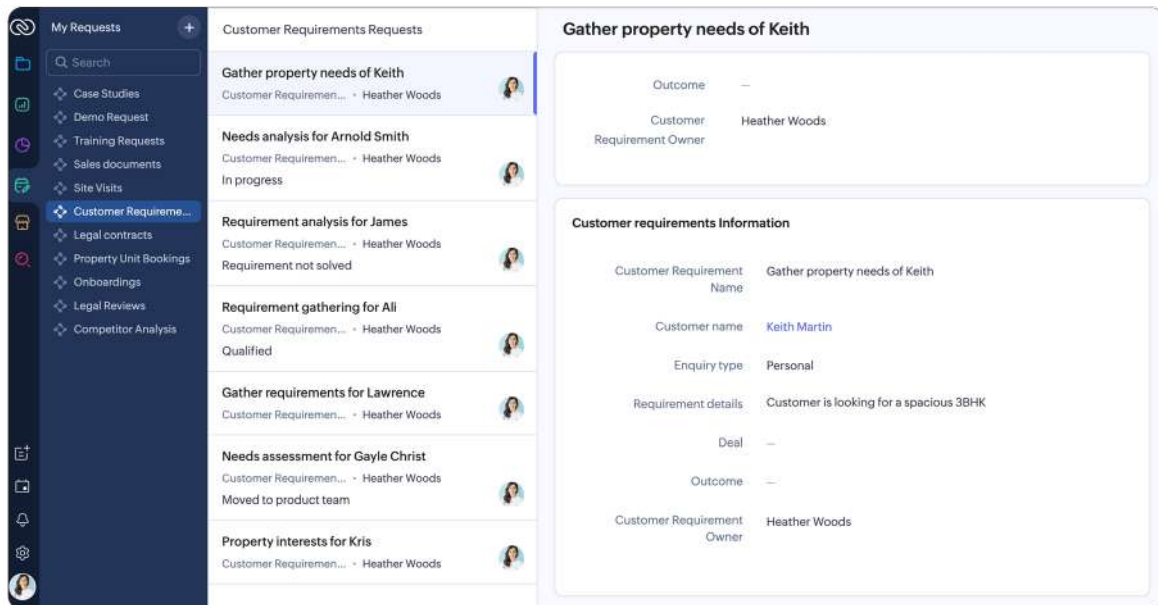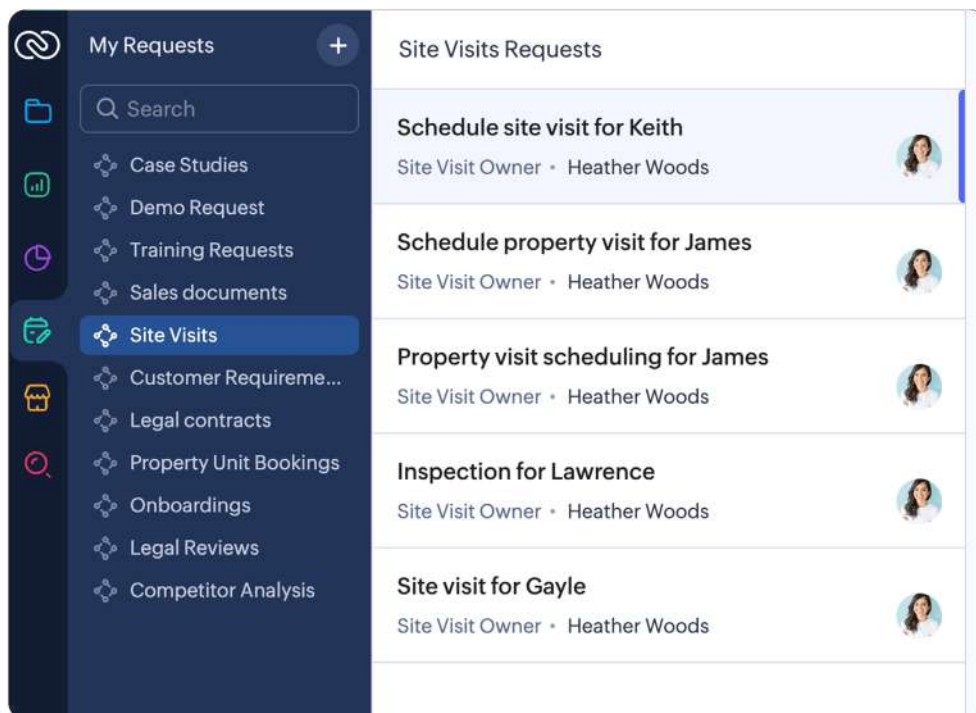

Now Martha from Presales logs into her account, finds this request from Heather, processes it, and hands it back to Heather— all in the same CRM account.
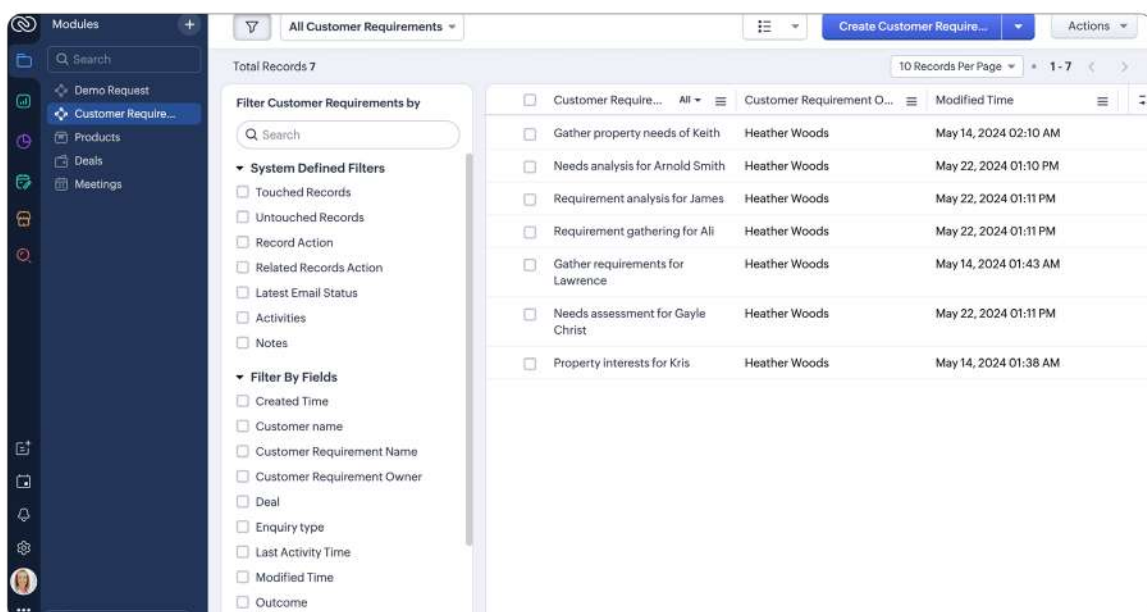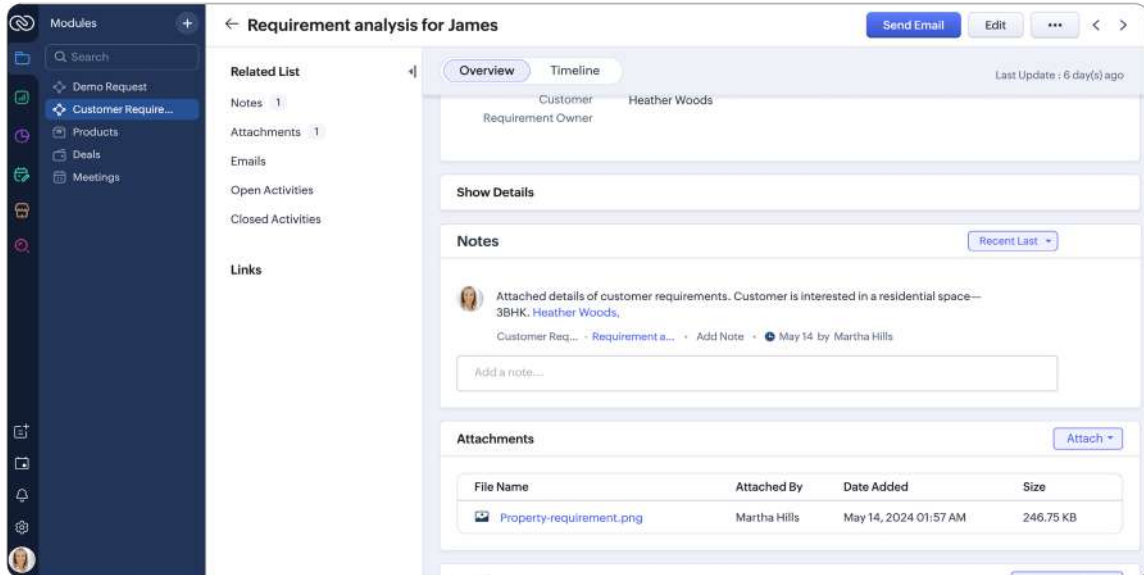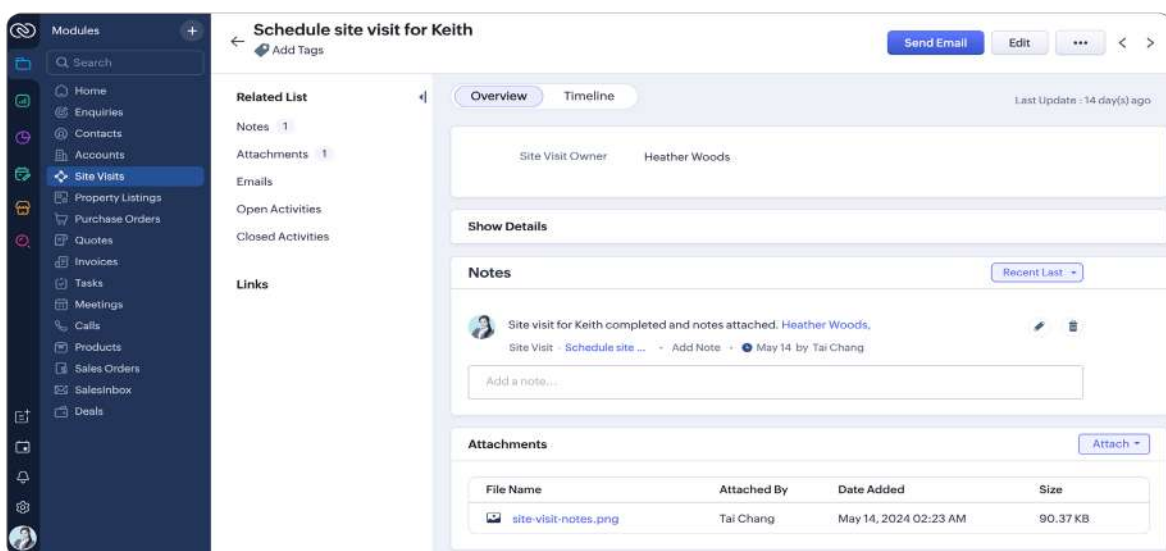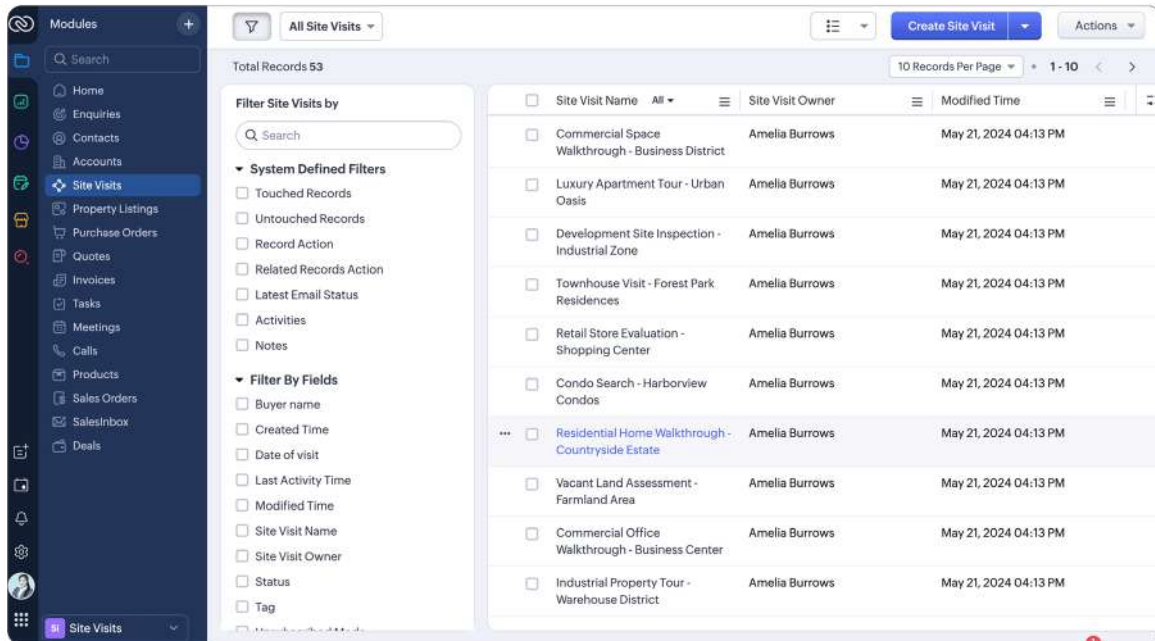
After learning the customer requirements, Heather decides to schedule property viewing for the customer based on the needs and preferences gathered. She raises a "Request" to the Site Visits team.

Tai Chang, Zylker's Site Visit Executive logs into her account, goes to the Site Visits Team Module that she is part of, finds Heather's request and processes it.

Similarly, once the customer has finalized a property, Heather can request Raghav from Payment Operations to initiate unit booking, and Priya Raman to proceed with Key Handover— all in the same system.
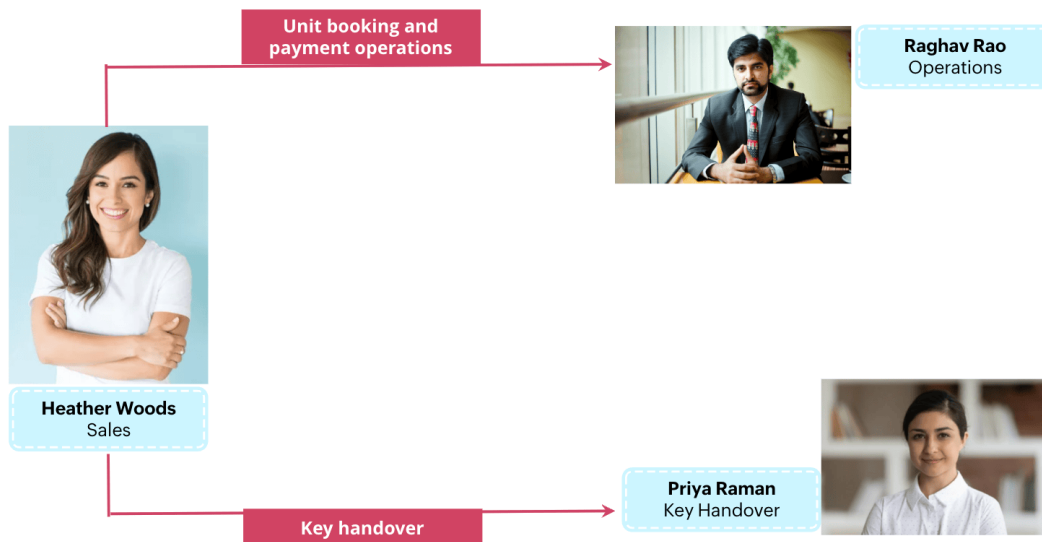
Also, at the end of the day, while all of these different records exist in multiple Team Modules, they are all connected to the same customer or deal for context.
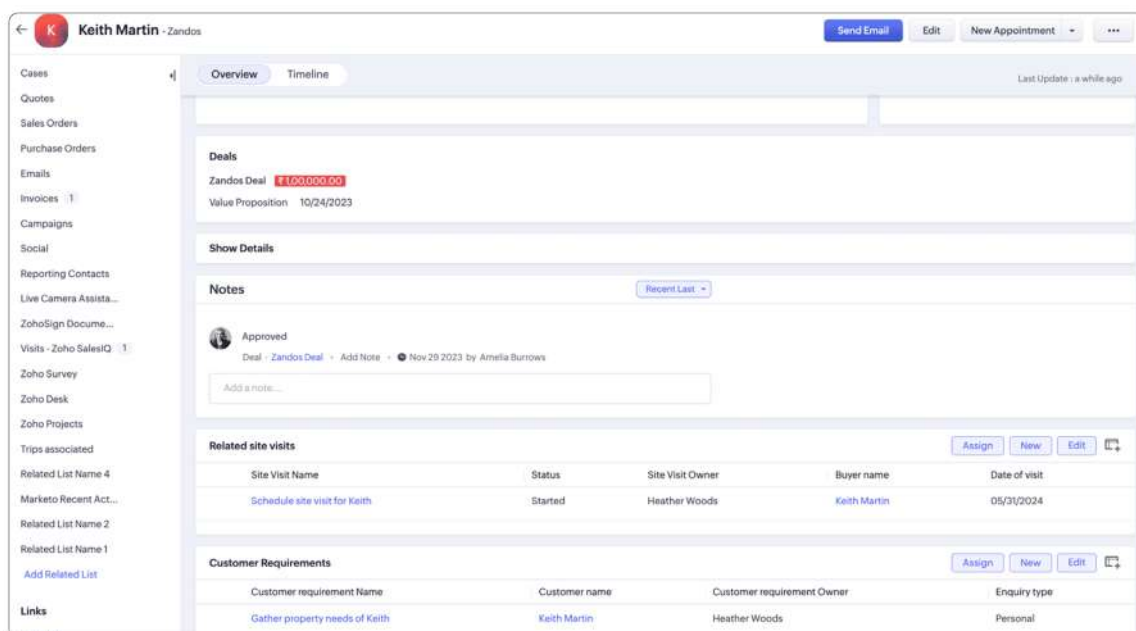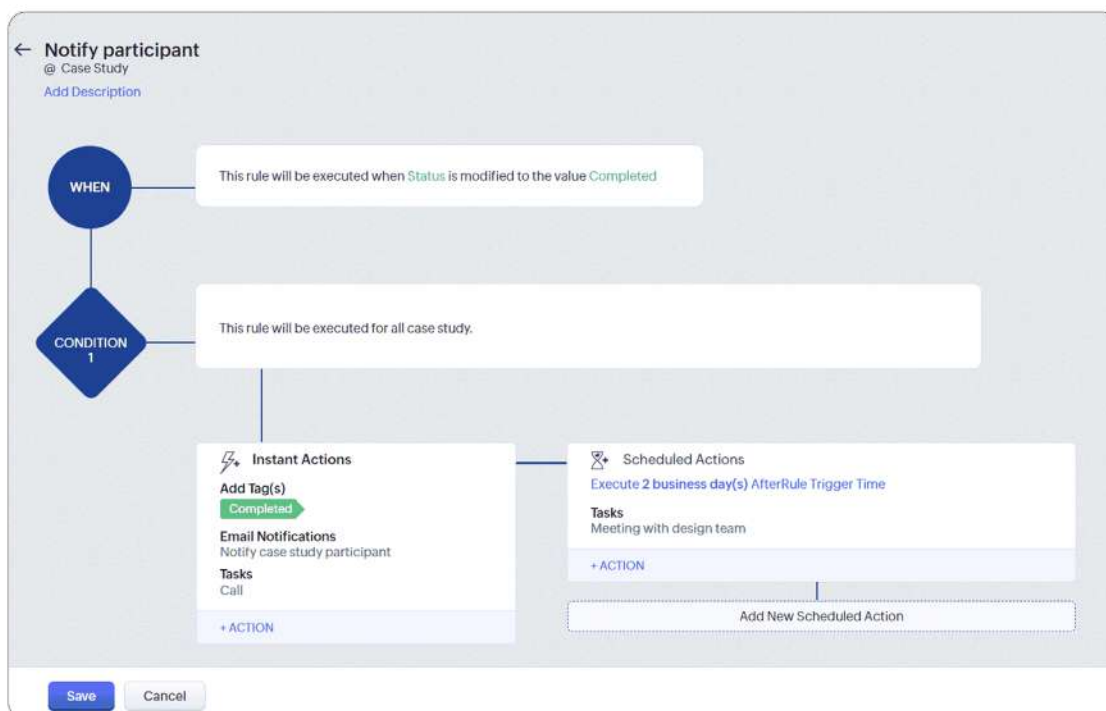
Just like in your physical office space, where you have the freedom of your private spaces for your team, but have conference rooms to coordinate between teams — you have Team Modules to carry out your activities in your own space. Link them together with the right requests to the right team to accelerate business processes, make a record of all the communication and coordination within the system, and serve your customers more efficiently using Team Modules.

Automation in Team Module

The Team Module also supports the following automation and process management capabilities:

- **Assignment rules:** These can be configured to **automatically assign record owners** based on pre-defined rules. For example, if a case study involves an enterprise customer, you can assign it automatically to a senior marketer. Note: In case the assignment cannot happen to the specified Team Module user for some reason, the record will be assigned to the default user. If it cannot be assigned to the default user, it will be assigned to the first Team Module user.

- **Workflow rules:** Workflow rules **automate the execution of actions** based on triggers. For example, you can automatically send an email to a customer when your case study's prep work is complete.
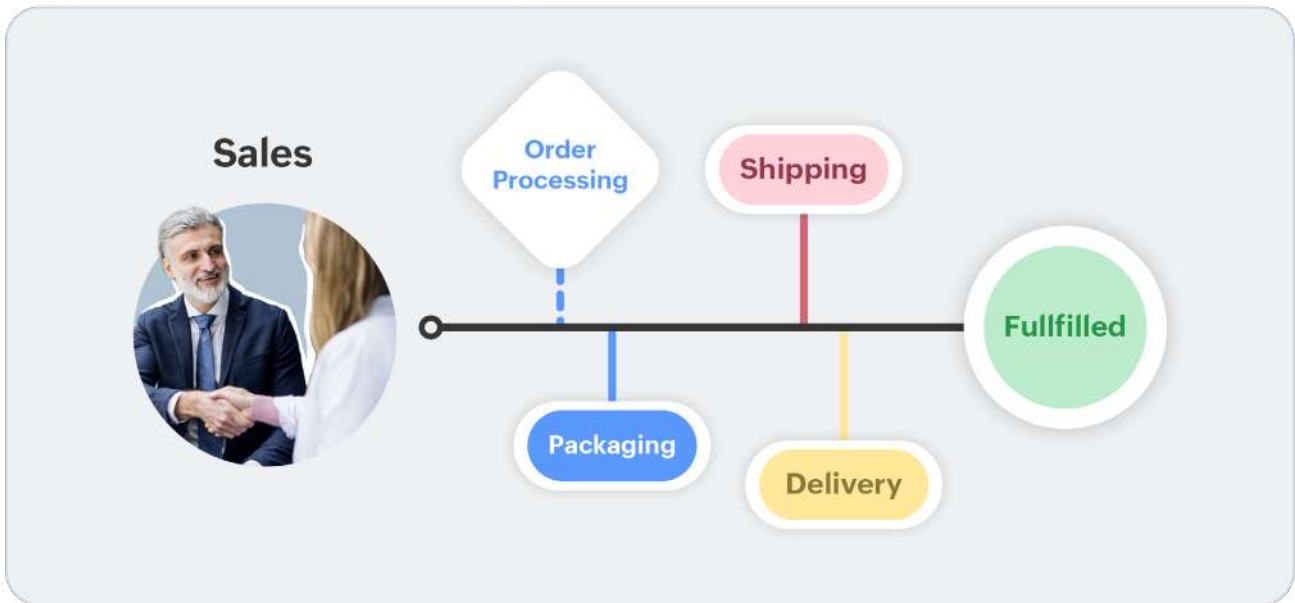
- **Approval process:** You can set up **approval processes with multiple approvers** to ensure that major changes are signed off by concerned stakeholders. So, when the case study's prep work is complete, you can make sure that it gets approved by the marketing manager.

- **Blueprint:** A blueprint lets you ensure **compliance to processes** within a Team Module. For example, a case study request has to go through several stages before it is approved. The blueprint helps you set up this process, ensuring users can move on to the next stage only after completing required tasks.
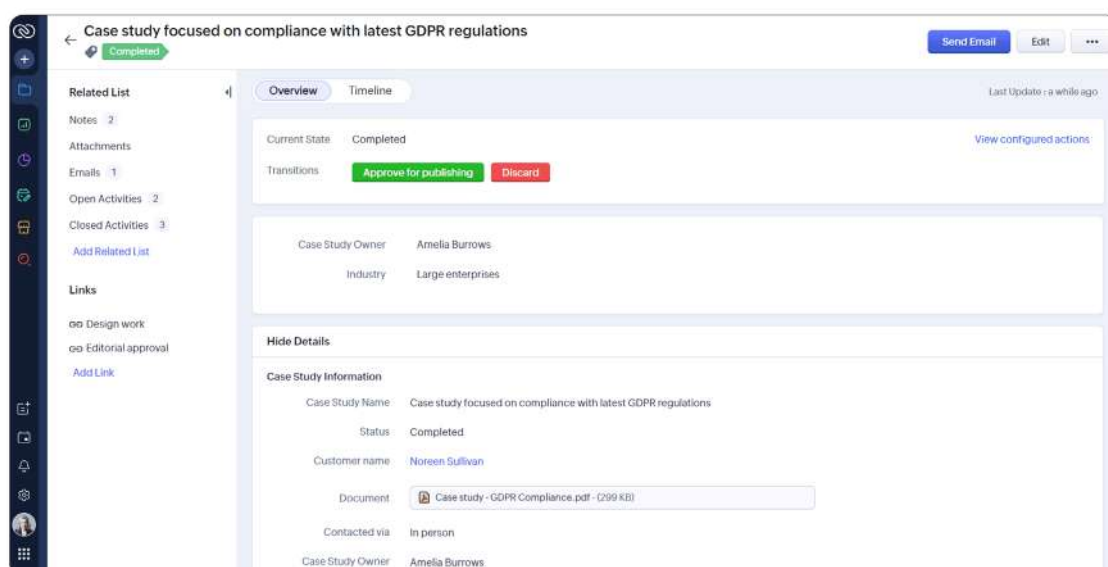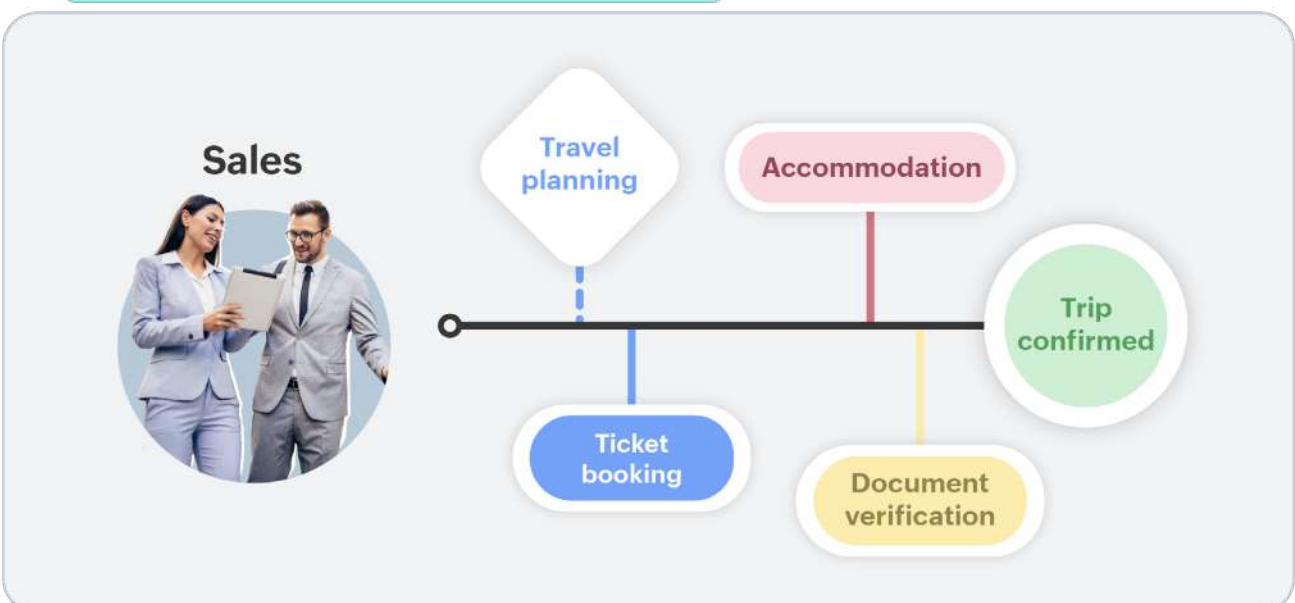

To understand the nitty-grittys of how the permission layers work with respect to automating processes in the Team Module, refer to this guide.

Here are a few more examples of different teams from various industries that could benefit from Team Modules and implement their processes in CRM.
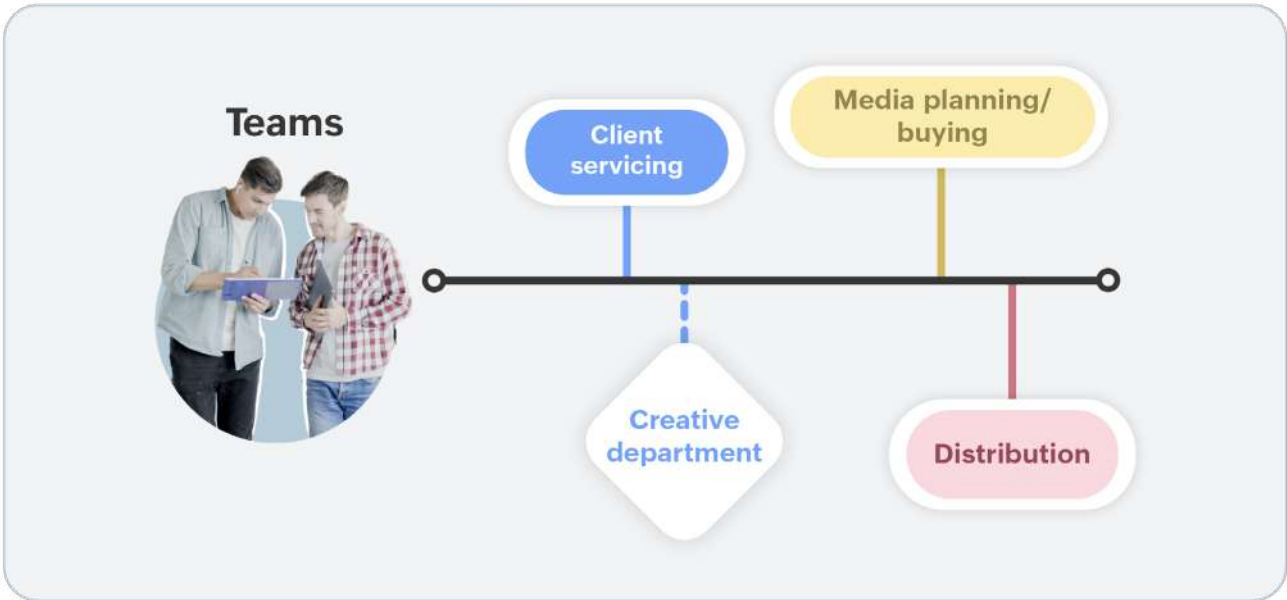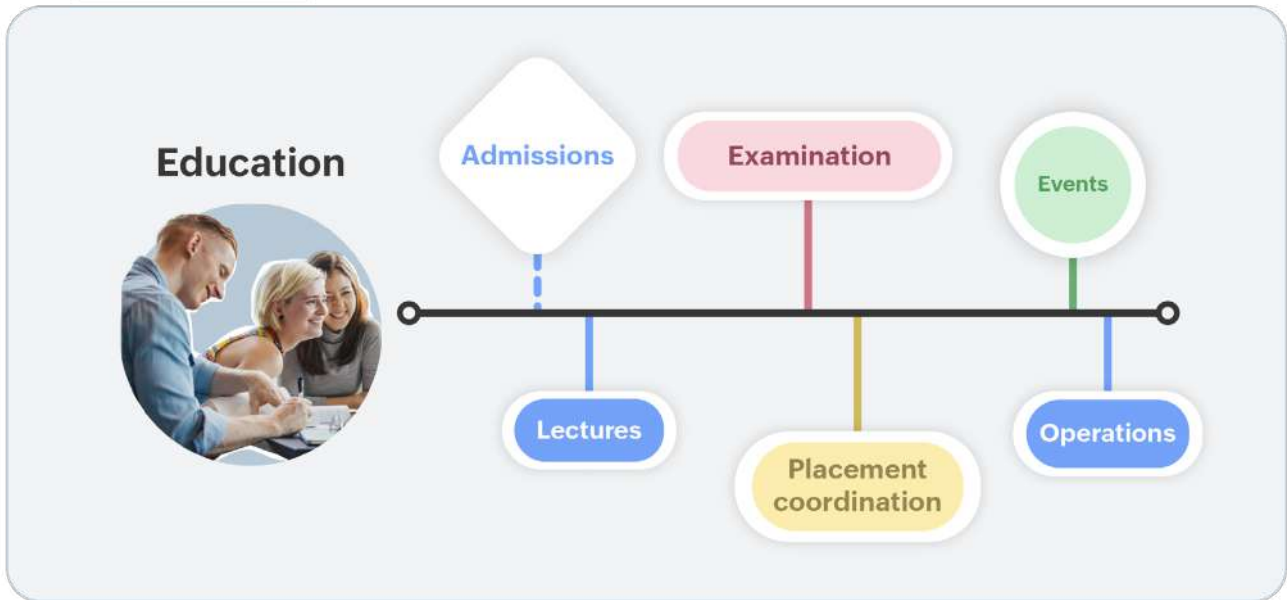
Order management

Travel/Hospitality management

Advertising agencies
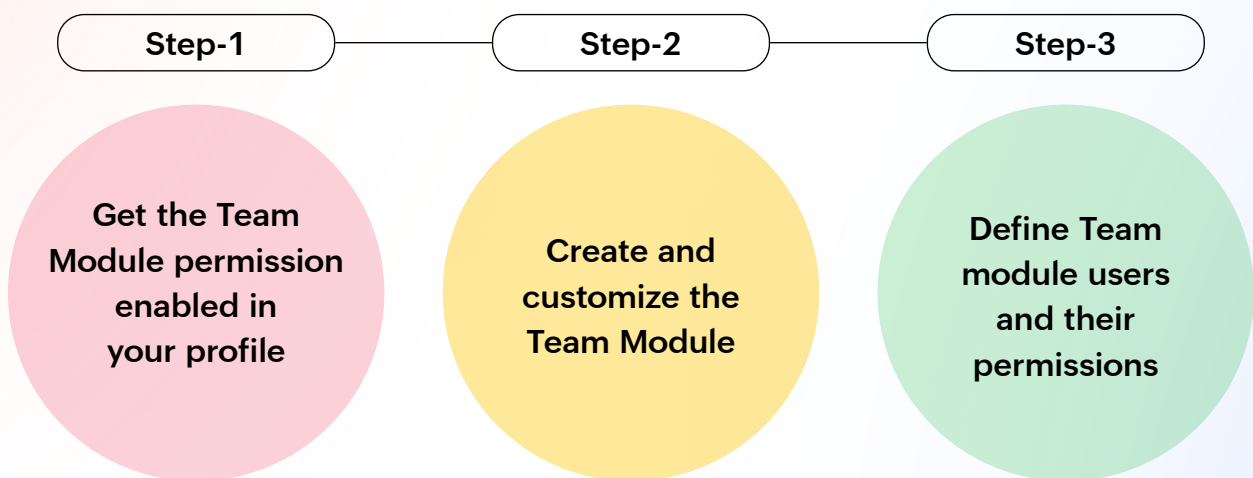
Teams

Client servicing

Media planning/ buying

Creative department

Distribution

Education

Education

Admissions

Examination

Events

Lectures

Placement coordination

Operations

Setting up your CRM for Everyone

Setting up a Team Module is a 3-step process.

| Step-1 | Step-2 | Step-3 |

Get the Team Module permission enabled in your profile

Create and customize the Team Module

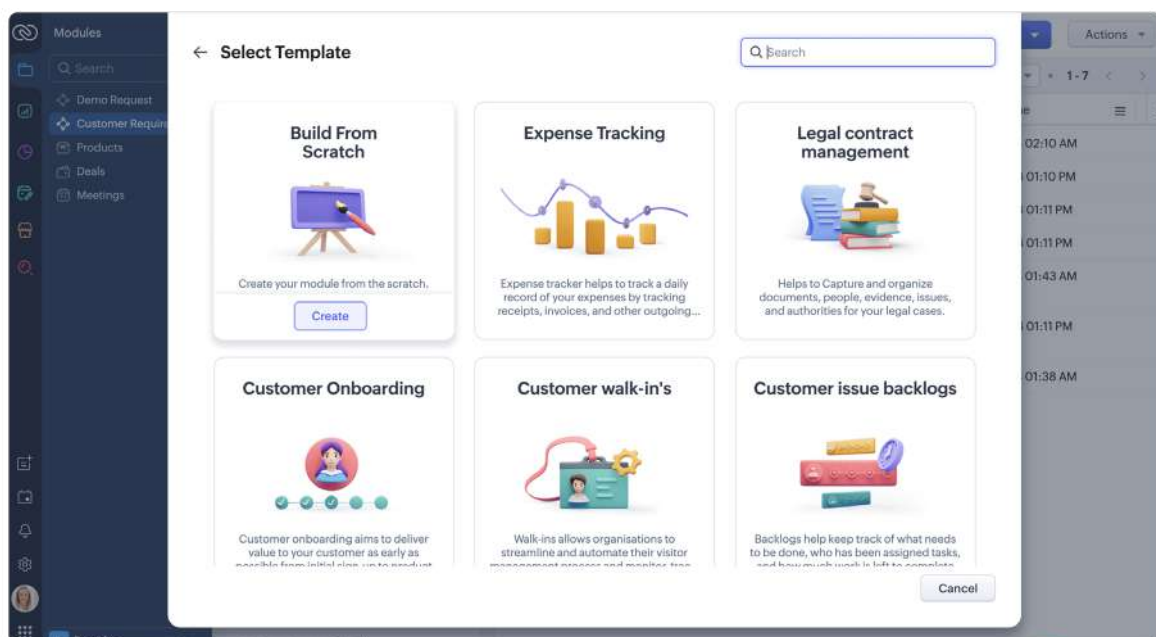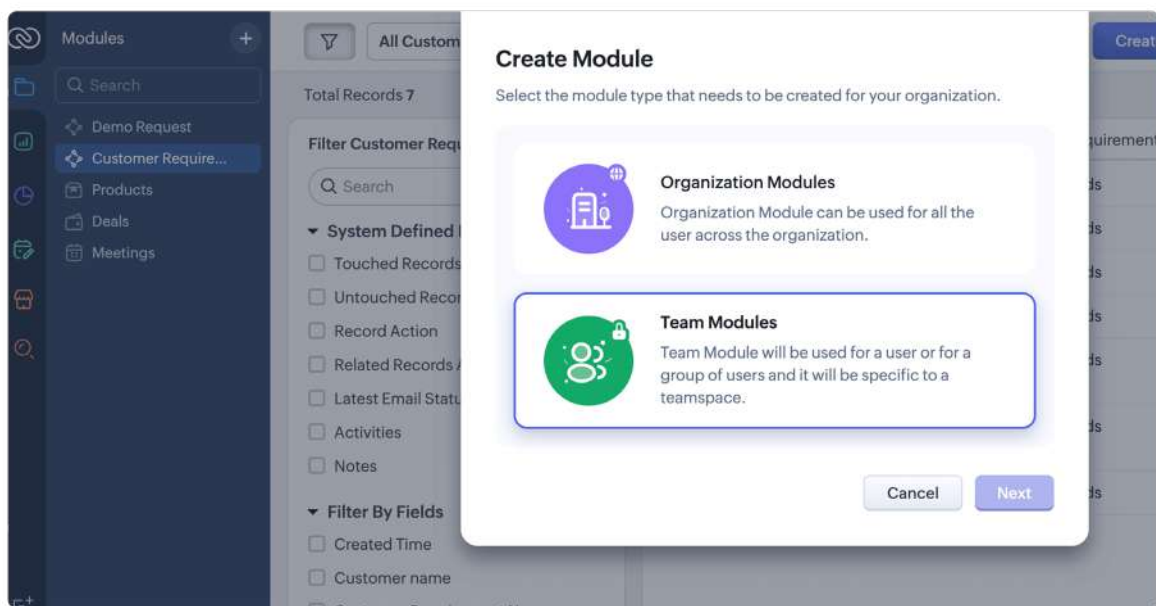**Define Team module users and their permissions**

Step 1: A user needs to have the Create Team Module permission in their profile.
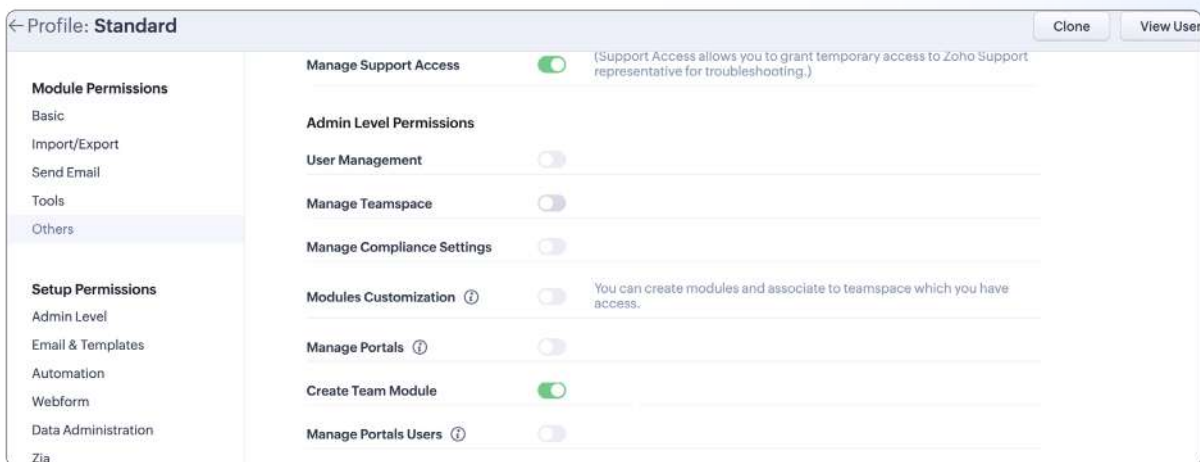
Step 2: Once the right permission is enabled, you can Create and customize modules: Team Module creation is easy with multiple out-of-the-box templates. You can add or modify the fields as needed.

Team Module creation is easy with multiple out-of-the-box templates. You can add or modify the fields as needed.

Step 3: Define Team Module roles and permissions: With the addition of Team Modules, you need to also learn about the following new roles and their permissions.

Team Module Admin

Complete authority over the Team Module seeings + Data

Team Module Users

In-charge of day-to-day affairs of the team's processes.
Manager | Member | Participant

Team Module Requesters

External members (from a different team) whose activities depand on the deliverables from the current team.

Team Module Admin

The Team Module admin has complete control over the Team Module, that is both the front end data and backend settings. This includes fields, permissions, configurations, and data (records).

Who can become a Team Module admin?

• Typically, the heads of a department, who are responsible for all of the team's processes, or an individual spearheading a specific process in a team could be made the Team Module admin. The criteria is that, they should have the knowledge about the specific process entrusted with them, and also hold themselves accountable to the usage of the Team Module.

• Alternatively, if you want to seek the help of a Central IT team member, you can also make them the Team Module admin. This way the Team Module settings are still taken care by a central CRM admin, while the processes are governed by the Team Module's managers.

- As far as the CRM system is concerned, the idea is to enable multiple team leaders to take ownership of their teams and set up and manage the processes. Therefore, even if a user has the Standard profile and has restricted access to the rest of CRM, if they have the Team Module permission enabled, they can create and manage a Team Module. Once a user is made Team Module admin, barring this module, the permissions for the rest of the CRM account will be dictated by their profile and role.

Team Module Users: Internal members

Team Module users are internal team members responsible to create and execute processes in their team. They will participate in the day to day affairs of the team under 3 different capacities: Managers, Members, and Participants.

- ✔ **Managers** have complete visibility and control over all records in the Team Module, irrespective of who has created them. In the case of a marketing team, this is ideal for the marketing manager.

- ✔ **Members** can view all records, including theirs and those of others. But they cannot modify or delete others' records. They can create, edit, and delete only their own records. In the case of a marketing team, this is ideal for a team member, where they need to refer to others' work but can only create
or modify their own.

- ✔ **Participants** can view, create, edit and delete only their own records. They do not have access to any other records, and cannot even view others' records. Ideal for interns. Project interns may not need access to other members' records. They can only work on what is assigned to them.

Team Module Users

User Type	Definition	Access to Own records	Access to Others' records	Example
Manager	Highest access to all records in the team	View, Create, Edit, Delete	View, Create, Edit, Delete	Marketing manager
Member	Refer to others' records but work with only their own.	View, Create, Edit, Delete	Only view	Team member
Participant	Work only on their own records.	View, Create, Edit, Delete	Not even view	Project intern

If the manager and admins are different people— the manager cannot access backend module settings for customization. Admin by default can access both backed settings and front end data.

All the users will see the Team Module in their associated Teamspace.

Requester: External member

Requesters are typically users from a different team, whose work depends on the current team. They do not participate in the day-to-day affairs of the team from which they make requests. However, their ability to directly add records to their module as their "request" helps in better coordination among teams for the entire company.

Eg: A member of the sales team can be a "requester" of case studies from the "Marketing team". Once a request for a case study is raised, the Requesters can create and track records using the **My Requests Tab** in their account. They will not participate in the day to day affairs of the Marketing team, and therefore will have no access to the Team Module in their account. They will only see a list of their requests to different Team Modules in the My Request tab without direct access to the Team Module(s).

Guidelines, Best Practices and Points to Remember

Central admins still retain highest authority

Decentralization of module creation comes with great responsibility. Each Team Module admin must take ownership of that module and is accountable for the processes in that module. The advent of Team Module admins could ease dependency on central admins for the smallest changes, and central admins could potentially delegate smaller admin activities to the respective teams and focus on organization-wide administrative priorities. However, Team Module admins do not supersede central admins. The Super Admin still retains the highest permissions and can even revoke Team Module admin access if they feel something is wrong or amiss with the administration of that module. The CRM Admins always have the ultimate power to restore balance as needed in the account.

Central admins can also be Team Module admins

While CRM for Everyone offers the flexibility of making representatives /heads of each team the Team Module admin, this is not a mandate. That is, you are not compelled to appoint a team representative as the Team Module admin. If you do not find this appealing or you want to use Team Module only for coordination (using Requests) and do not want to take the decentralization route, you can always have a member of the Central Admin team set up and configure Team Modules for different teams. Then in this case, the managers of each Team Module will only be able to take care of day-to-day activities and work with the data in the Team Modules. They won't be able to modify the settings of that module.

Team Module best practices

- While making a CRM user a Team Module Admin, a Super Administrator needs to evaluate and be mindful of the following:

- What is the current role and designation of the user in the organization? What are their responsibilities in the said team?

- Have they had at least a year's experience working with Zoho CRM or have they been trained to use the system?

- A Super Administrator can approve or deny a user's request to be made a Team Module admin. Though this action is not currently active in CRM, as a process, this is recommended for Super Admins to ensure that the right people become Team Module admins.

Next Gen UI - Quick Tour

The moment multiple teams are brought on-board the CRM, we need to ensure that the UI is easy and intuitive enough to accommodate their varied needs. The Zoho CRM User Interface has been re-designed for a greater appeal and to support easier configuration of key settings such as modules, reports, and dashboards, apart from several other visually pleasing surprises!
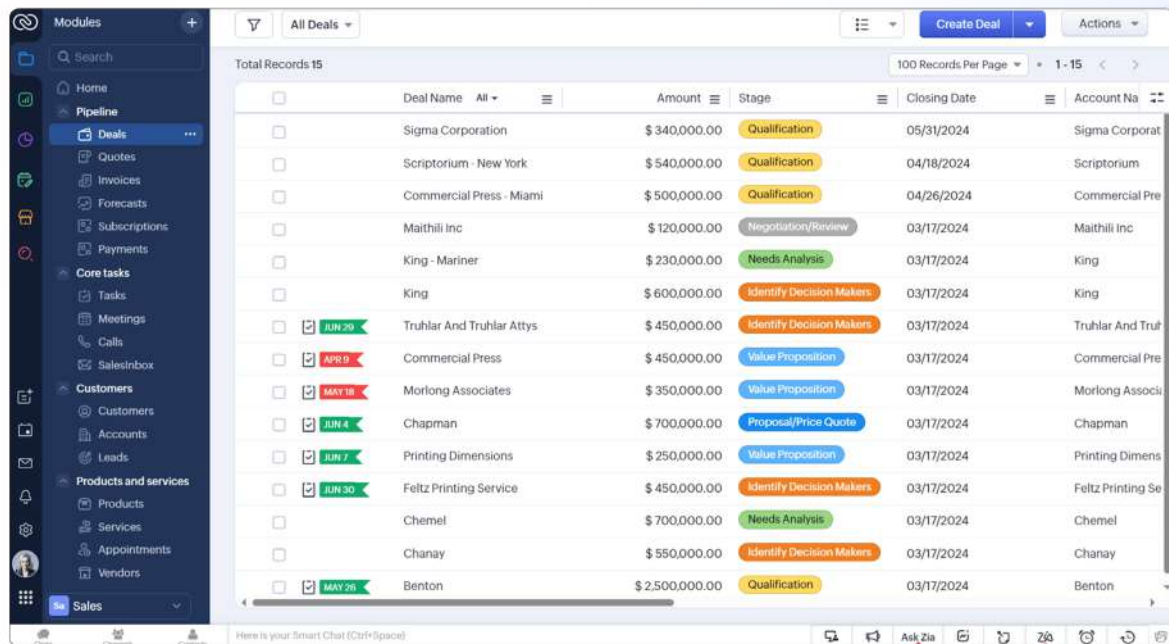
Following are the key highlights of the Next Generation User Interface of Zoho CRM.

Reorganization of menu options from the top band to the left-hand side vertical sidebar.

The sidebar is now an extremely functional piece of the UI with contextual shortcuts for quick settings, neat folders for better organization of modules and more. The sidebar now has two divisions—Primary Sidebar and the Secondary Sidebar.
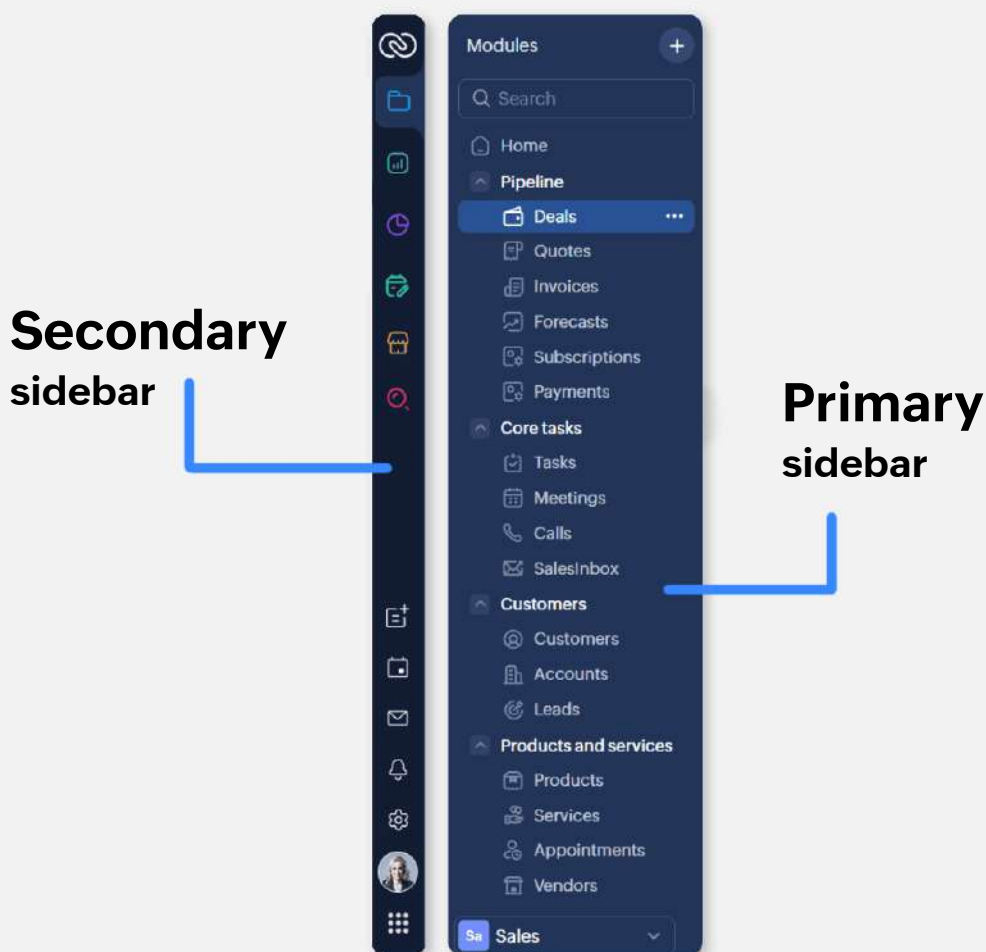
The Primary Sidebar is for first-level navigation of the product.

The top portion of the Primary Sidebar houses icons to view and work with Modules, Reports, Dashboards, Requests, Marketplace, and Global Search.

The bottom portion of the Primary sidebar now contains intuitive utility icons such as Quick create record, Mail magnet, Calendar and more. (originally located on the top right corner of the UI).
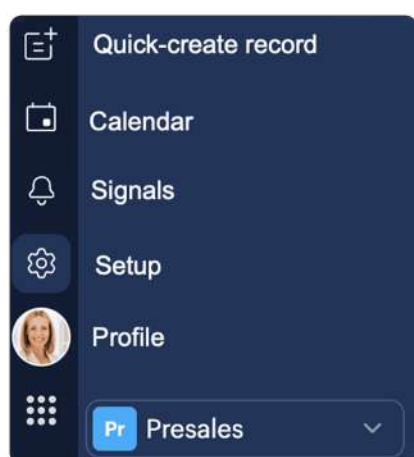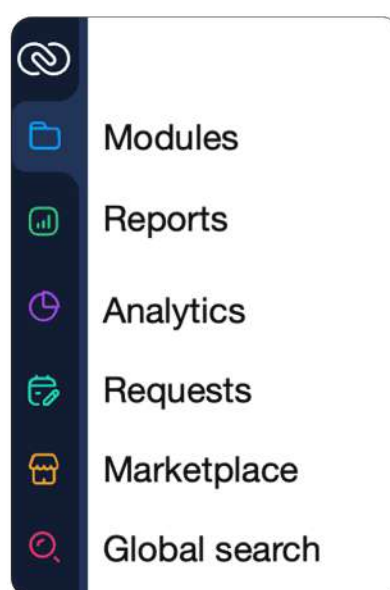

The Secondary sidebar opens up quick-controls contextual to what you choose in the Primary sidebar. This is collapsible in order to allow you to maximize your right-hand side work area.

Teamspace

**Option selected in the
primary Sidebar - Modules**

You also have contextual
shortcuts to Setup options
on the Secondary sidebar.
Ex: You can create a module,
a report, or a dashboard
right from this location
without having to navigate
to the backend Setup.
(While the backend Setup
is still intact, the Secondary
sidebar options offer a quick
shortcut).

**List of modules
open up on the
secondary sidebar**

**Expand/ collapse
secondary sidebar**
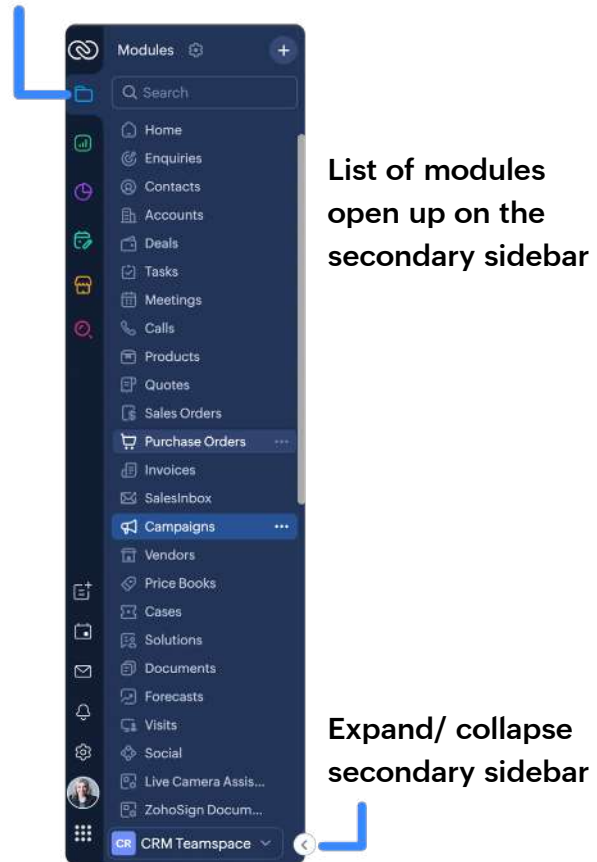
Click here
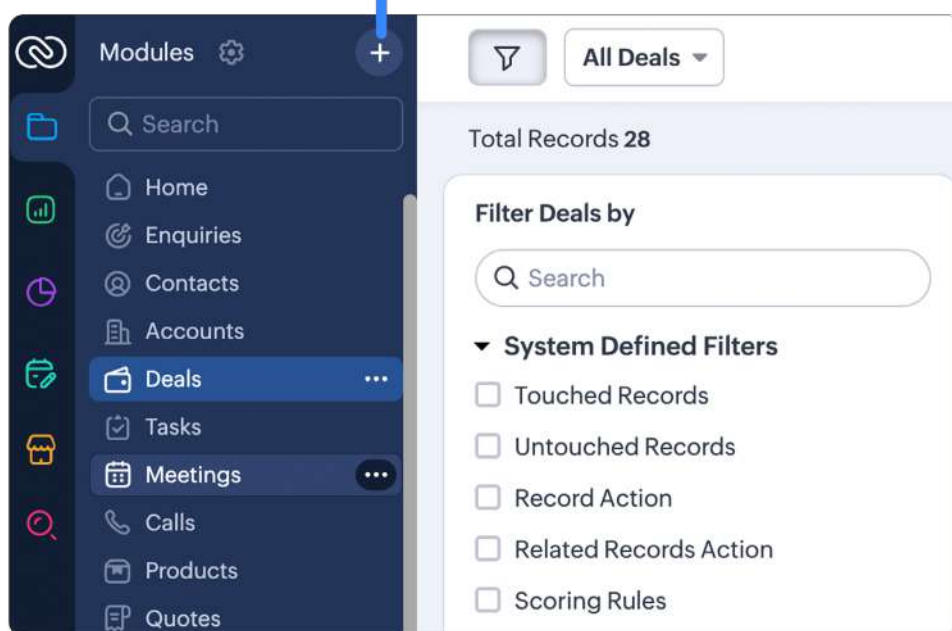
You also have contextual shortcuts to Setup options on the Secondary sidebar.
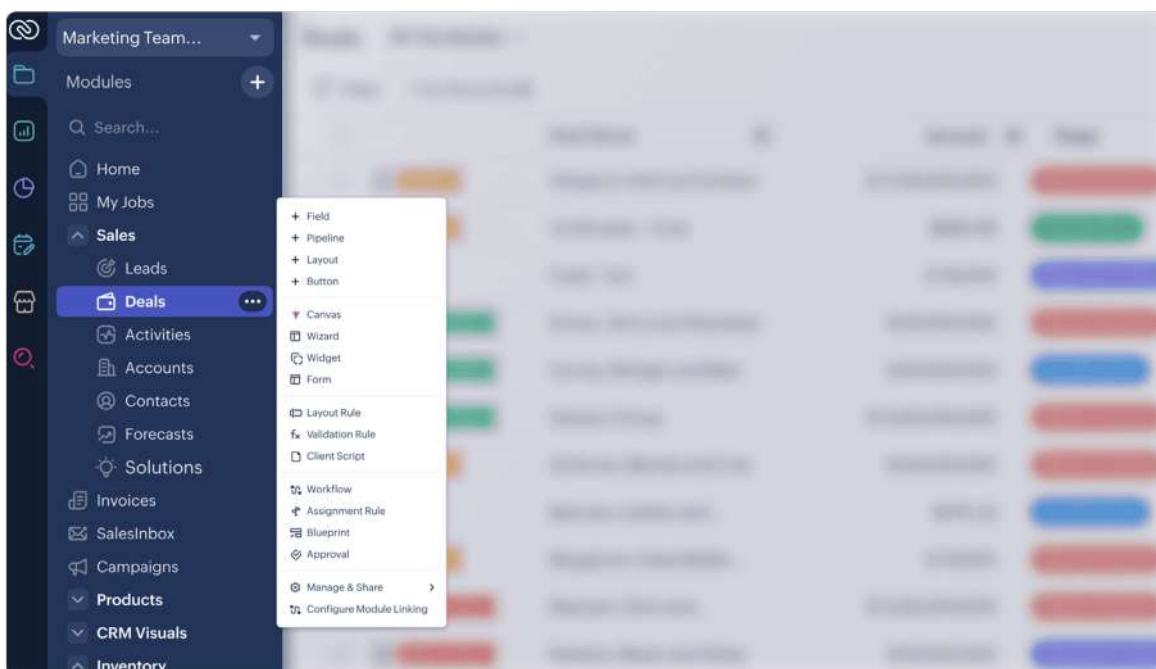
Besides, the Secondary sidebar houses folders for better sorting modules, reports, etc.

Organized Teamspaces for Focused Work

If you have multiple teams on board the CRM, you need a better way to organize and manage the data and work being done by these multiple teams.
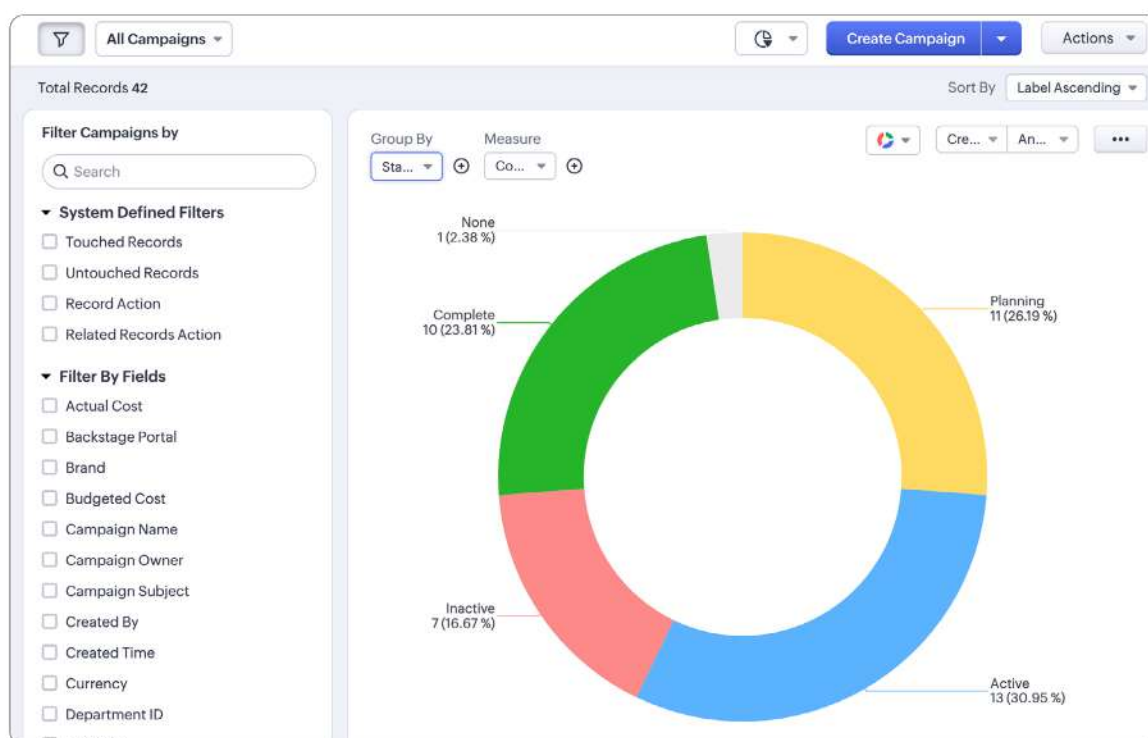
That "better way" is now "Teamspaces". Each team can have their own folder-like space where all of their process modules are grouped. This enables easy segregation among teams without one team crossing over other teams' modules.
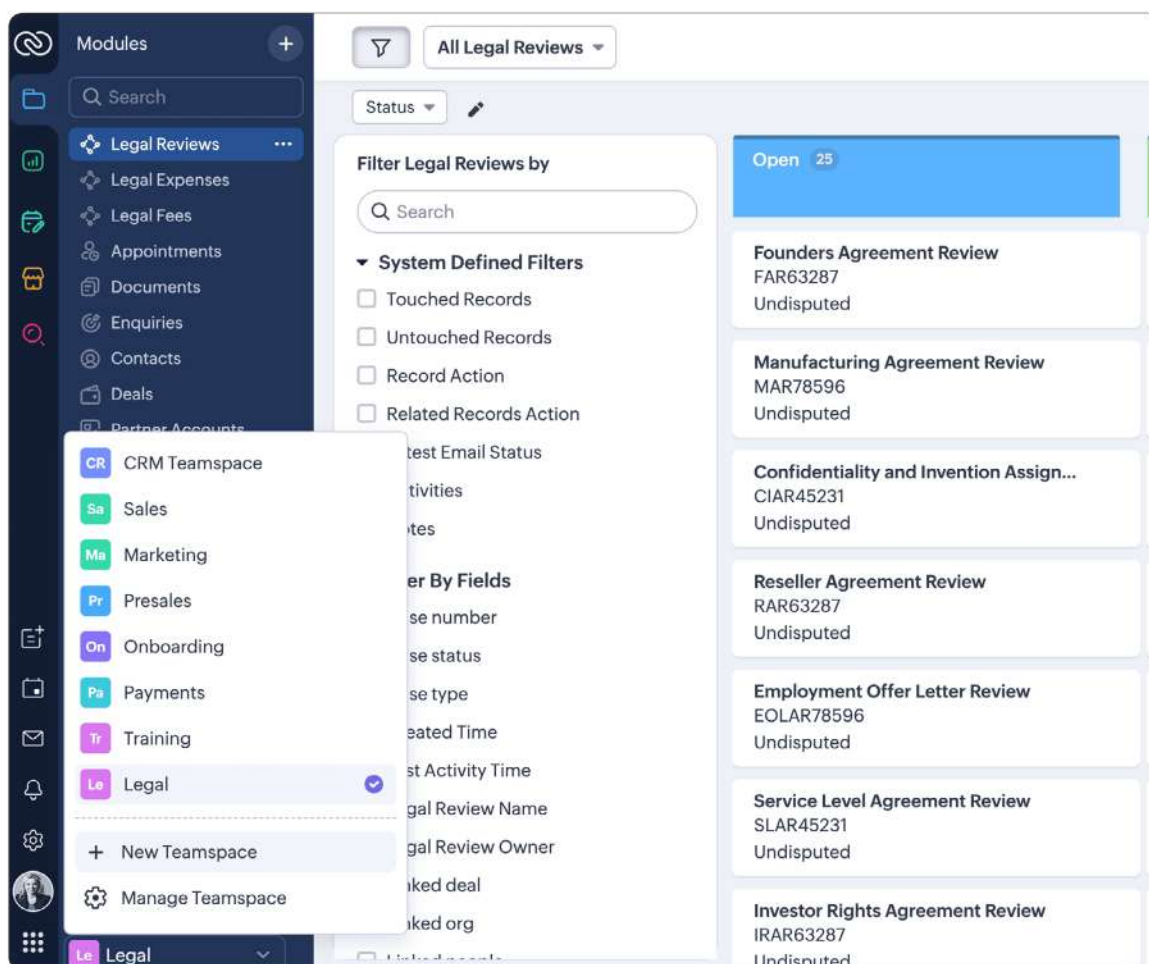
As part of face-lift on the user interface, we also have two more visually enhanced features that would especially be useful in the day-to-day activities of multiple teams.
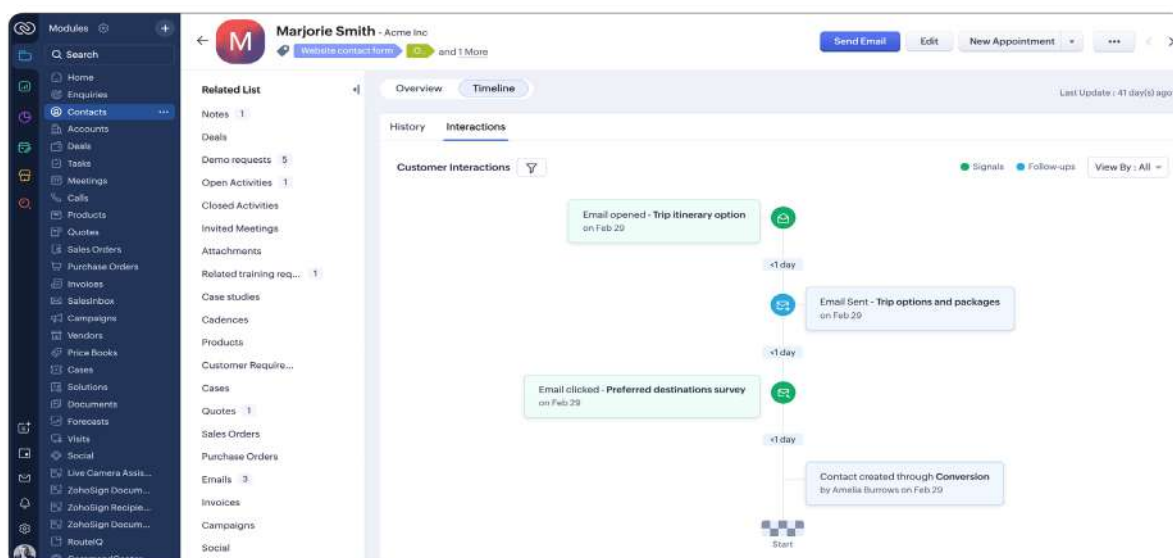
- **Chart view inside list view**— where the records in a module can be organized in the list view space as a chart component.

You can click on multiple segments in the chart to view the records distributed in that segment.

- **An omni-channel Interactions tab —** where you will be able to see the complete timeline of communication via multiple channels with a customer.

Try CRM for Everyone today to empower every team in your organization to set up and manage their work in the context of the customer and promote seamless coordination among all within a new and refreshing Zoho CRM!

CRM for Everyone — Test your knowledge!

Test your knowledge by taking the following practice exercises.

Match the following

1. Teamspaces	**(a).** The ultimate authority in a CRM
2. Team Module	**(b).** A user who can create and modify their and others' records in a Team Module
3. Requester	**(c).** A user who can view all records but only create and modify their own in a Team Module
4. Participant	**(d).** A user who can control the module settings as well as have access to a Team Module's data.
5. Member	**(e).** A folder-like dedicated work area for every team
6. Manager	**(f).** An external team member, who can ask for deliverables / work from your team.
7. Team Module Admin	**(g).** A user-controlled private module to implement and run a specific team's process in an organization
8. Central Org Admins	**(h).** A user who can view and work with ONLY their own records in a Team Module

True or False

1. An org admin has no powers over a Team Module once a Team Module Admin takes over the operations of a Team Module

Answer:

2. A Team Module admin can ONLY have access to the backend module settings

Answer:

3. The user denoted as a Manager of a Team Module can control backend settings.

Answer:

4. Team Modules have been introduced in order to help organizations bring all of their customer facing teams to Zoho CRM and manage their work in the context of the customer.

Answer:

5. The Team Module does not support Workflow rules and Blueprints.

Answer:

Answers:

Match the following.

1. (e), 2. (g), 3. (f), 4. (h), 5. (c), 6. (b), 7. (d), 8. (a)

True or False

1. FALSE

Feedback: Org Admin's power always supersedes that of Team Module Admins

2. FALSE

Feedback: A Team Module admin has access both front end data as well as backend settings

3. FALSE

Feedback: The Manager of a Team Module cannot access backend settings, they have the highest access to the front-end data

4. TRUE

Feedback: Indeed, Team Modules are introduced to help you bring all customer facing teams inside Zoho CRM and manage their work in the context of the customer.

5. FALSE

Feedback: Team Module does support Workflow Rules and Blueprints, Approval process and Assignment rules as well. A few more automation settings are also on the roadmap.

Zoho CRM for
Everyone

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