The Ultimate Action Plan For A New CRM

ZOHO

Game-changing value

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1 Why CRM is Your Secret to Success

In today's fast-paced business world, a well-implemented Customer Relationship Management (CRM) system is the backbone of any successful organisation. It's no longer just about tracking sales. It's about improving customer relationships, streamlining workflows, and providing real-time data insights.

Whether you're an SME, a mid-sized enterprise, or a global corporation, your CRM should be more than just a digital Rolodex. It should be a strategic asset.

The challenge? Choosing and implementing the right CRM for your business can be overwhelming. With rapid advancements in technology, particularly in automation and AI, making the right decision can feel like a real head-scratcher.

Why CRMs Matter

45%

of businesses saw improved sales revenue after implementing a CRM.

CRM systems are a game-changer. They transform how businesses manage customer relationships, fuel growth, boost productivity, and enable smarter decision-making. In fact, a study by Capterra found that [45% of businesses saw improved sales revenue after implementing a CRM].

A well-implemented CRM isn't just a tool – it's the key to staying ahead of your competition.

The Current CRM Landscape

CRM technology has evolved dramatically since the 1980s and 1990s, when it was just a basic database for storing customer contacts. Today, CRMs are powerful, cloud-based platforms that integrate sales, marketing, customer service, and analytics into one seamless ecosystem.

Key advancements in CRM technology include:

Cloud-based Accessibility

No longer tied to on-premise software, today's CRMs allow remote access and real-time collaboration regardless of if your in the office, at home or even chilling on a beach (wouldn't that be nice).

Automation & AI Integration

CRM systems now leverage artificial intelligence (AI) and machine learning (ML) to predict customer behaviour, automate tasks, and provide data-driven recommendations.

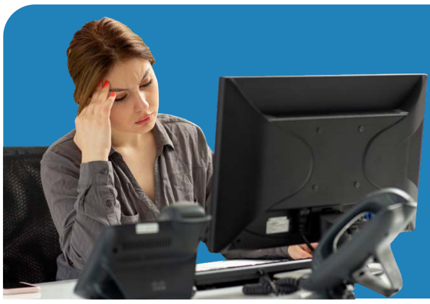
Omnichannel Customer Engagement

Businesses can now connect with customers through email, chat, social media, and phone. All managed from within the CRM.

Customisation & Scalability

CRMs can now be tailored to specific industries, business sizes, and workflow needs, making them adaptable as businesses grow.

The Importance of smart CRM Planning

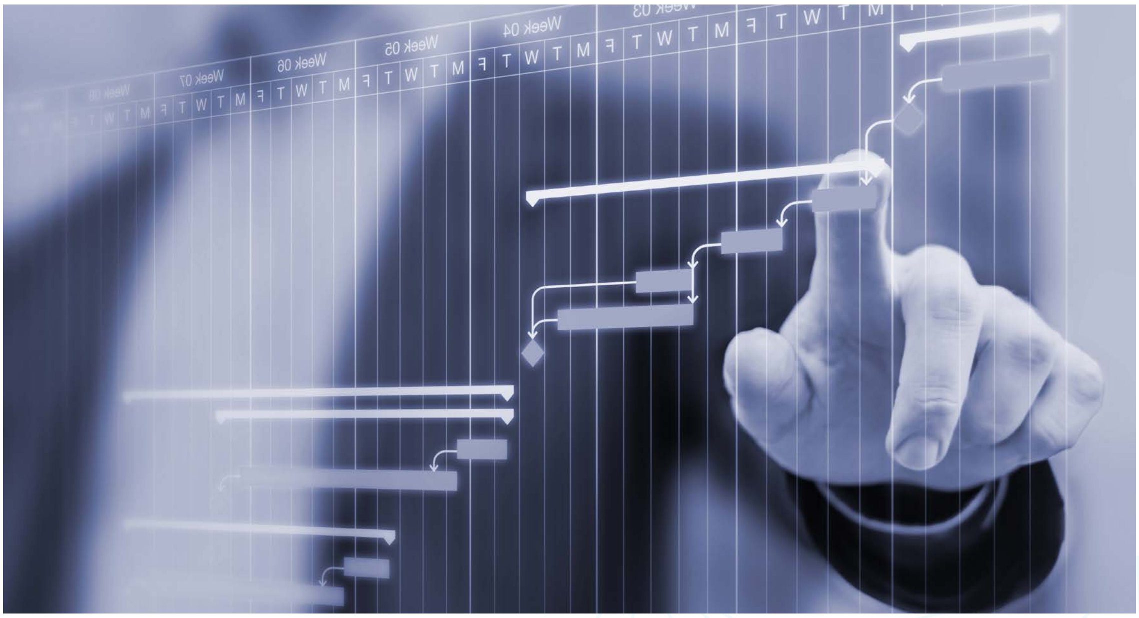


50-70%

of CRM systems fail due to poor adoption.

The benefits of a CRM are clear, but proper planning is key to unlocking its full potential. A poorly planned CRM implementation can lead to challenges like low user adoption or under-utilisation. In fact, studies show that CRM systems fail to deliver their full value 50-70% of the time due to poor adoption.

Without a solid plan, you risk missing out on the CRM's full ROI. Don't worry. This whitepaper will help you put that plan in place and make sure you're stepping off with your best foot forward.



2 Not Just a Sales Function: CRM for All

CRM isn't just for sales teams anymore. It's now a vital tool for marketing, customer service, and operations. Modern CRM systems streamline communication, enhance customer interactions, and drive business efficiency across all departments.

While traditionally focused on customer data and pipeline management, modern CRM systems integrate with:

Marketing

Lead nurturing, segmentation, and personalised campaigns.

Customer Support

Ticketing, case management, and automated follow-ups.

Operations

Workflow automation, data management, and forecasting.

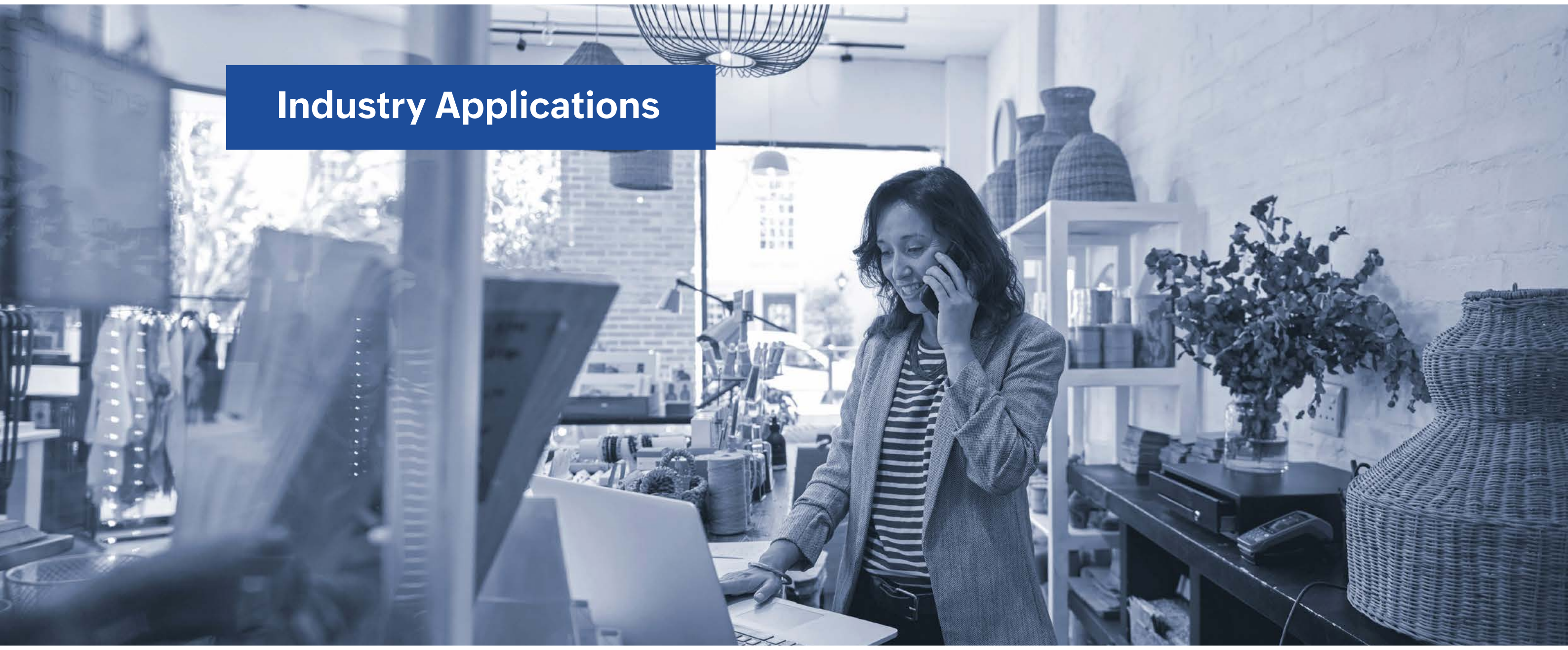
Finance

Payment tracking, invoicing, and financial reporting.

IT & Compliance

Data security, governance, and integrations.

A well-chosen CRM helps businesses improve cross-functional collaboration and create a seamless customer journey from prospect to post-sale engagement.



Industry Applications

CRMs are transforming industries far and wide. Whether you're in B2B or B2C, a travel agency or IT consultancy, CRMs are shaping the way companies operate. Here are a few examples:

Retail

CRM helps retailers personalise shopping experiences by tracking customer preferences, purchases, and browsing habits. This enables tailored promotions, loyalty programs, and real-time customer support.

Healthcare

In healthcare, CRMs streamline patient care by managing appointments, Communication, and medical records, while improving engagement through reminders and follow-ups.

Financial Services

CRMs in banking and insurance help manage client portfolios, track financial goals, and ensure compliance, all while providing personalised service and proactive outreach.

Manufacturing

CRMs in manufacturing track supplier relationships, manage orders, and improve coordination between sales, production, and logistics, enhancing operational efficiency.

Hospitality & Travel

Hotels and travel agencies use CRMs to track guest preferences and booking histories, offering personalised promotions and improving overall guest experiences.

Non-Profit Organisations

For non-profits, CRMs help manage donor relationships, fundraising campaigns, and volunteer coordination, enhancing engagement and improving communication.

These diverse applications of CRM demonstrate its ability to enhance customer experiences, streamline operations, and increase efficiency across industries.

3 Essential Checklist Before Investing in a CRM

Before selecting a CRM, businesses must carefully consider a few key factors to ensure they choose the right solution for their needs.

Here are some important questions to consider:

- **Business Goals:**
  What specific objectives are you aiming to achieve with a CRM? Whether it's improving sales, streamlining customer service, or enhancing marketing efforts, your goals will influence the type of CRM you need.

- **User Experience:**
  Will your team find the CRM easy to use? It's important to consider the user interface and overall experience to ensure high adoption rates across departments.

- **Customisation and Scalability:**
  Does the CRM offer enough flexibility to meet your unique business needs, and can it scale as your business grows?

- **Cost vs. Value:**
  What is the total cost of ownership, including subscription fees, setup, and training costs? Weigh the investment against the expected benefits to determine if it's a good fit.

- **Integration Capabilities:**
  Does the CRM integrate seamlessly with your existing systems, like email, marketing automation, or accounting software? Smooth integration is critical to avoid silos and streamline workflows.

- **Data Security and Compliance:**
  How secure is your data within the CRM? Ensure the solution complies with any industry specific regulations and provides robust security features.

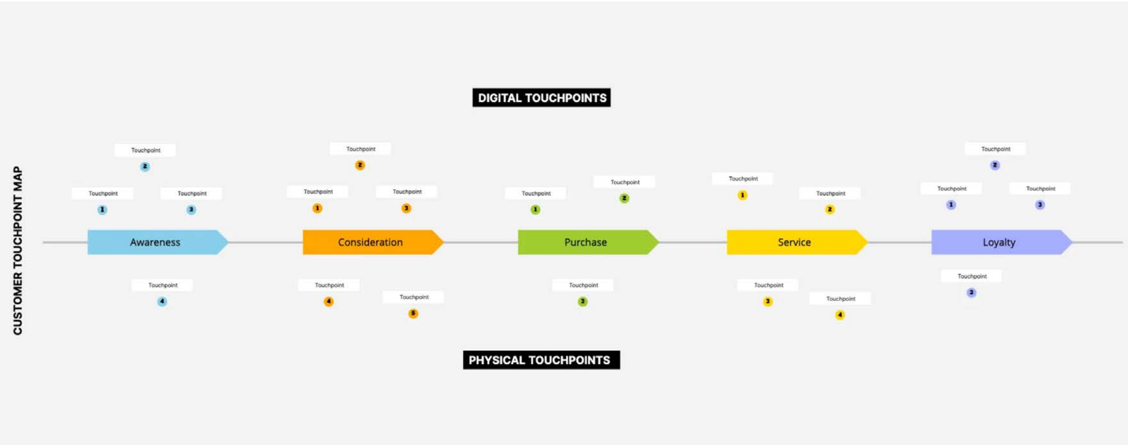
4 Step 1: Getting Your Foundations in Place

Before you get into the nitty-gritty of setting up a new CRM, it's important to lay the groundwork. Think of CRM planning like laying the foundations for a house - you want everything to be solid before you start building.

Here's how to plan for success:

Step 1.1: Map Out Your Current Sales & Marketing Processes

You must be able to transfer all sales (and often marketing) processes to your new CRM system. Record them before you start. Missed processes may be impossible in the CRM system you choose. Tools like Lucid Chart or Zoho Vani are invaluable for this.



Pay particular attention to sales to end users and dealers, credit and cash sales, online and offline sales, discount schemes, credit control, part payments, invoicing processes, service and delivery charges, delivery dates, sales of goods and services, stock control, optional extras, product configurations, lead generation, lead nurturing, lead assignment, lead qualification the list goes on.

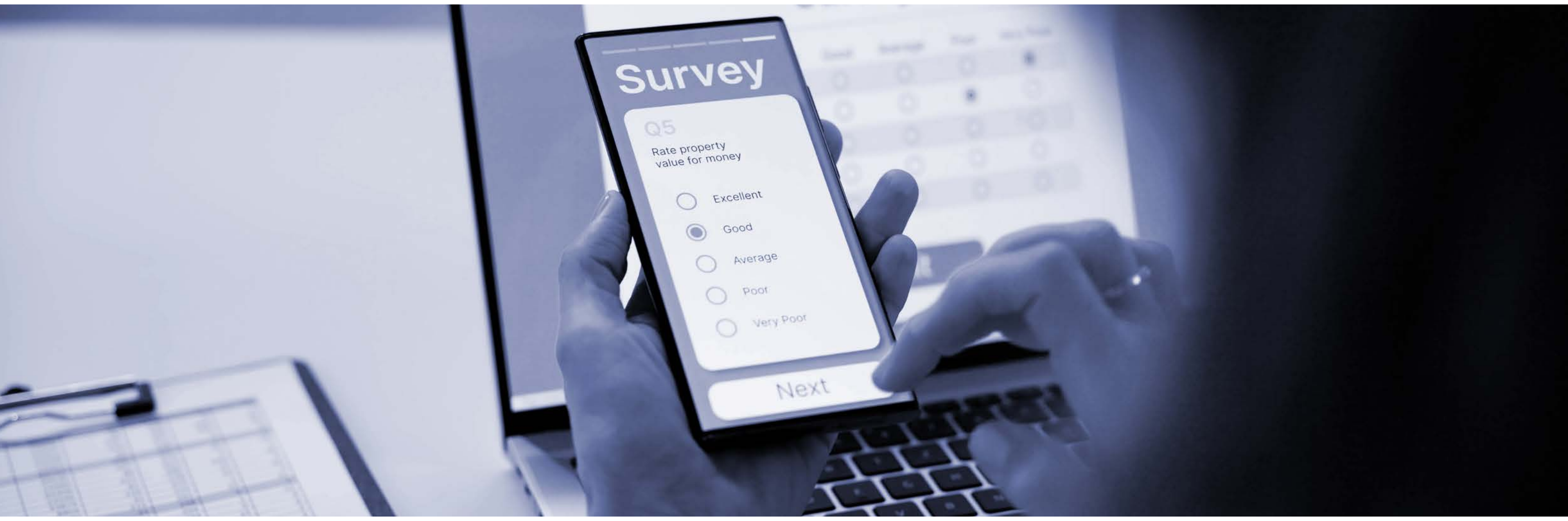
Businesses don't seem complicated until you try to record everything they do.

Step 1.2: Streamline The Sales Process

Improve your sales processes before you transfer them to your new CRM system. While you're mapping existing processes out, consider:

Improvements to the processes

- Some of your processes will have been laid down years ago - maybe when fax was the best way to communicate and documents had to be signed with a pen. Technology has moved on; your processes should too.



- Some of your customers will have changed the way they do business too. Do they need prices to be discounted by 14% then 7% when discounting by 20% achieves (almost) the same end result?
- This is the perfect time to survey users to find out which processes cause them the most grief. For example, can you reduce the activities that need approval?

Redundant processes

- This is the perfect opportunity to review whether some processes should be retired. If you're a law firm that no longer does conveyancing, there's no need to transfer your conveyancing sales processes to your new CRM.

Overlapping, contradictory or similar processes

- Processes are often developed by one team with no awareness of what another team is doing. For example, the New Equipment Sales Team may send quotes to customers in a completely different way to the Service Team. This is the perfect time to standardise your processes, making yourself look like one efficient business, not several siloed departments.

Step 1.3: Define and Setup Your Sales Pipeline

A sales pipeline defines the steps you take between the moment you come across a prospective customer and the time you make the sale.

Breaking the process into distinct steps makes sure you answer all the questions a purchaser has. The downside is that it can also over-complicate the process.

You need to decide:

- How structured do you want your sales process to be?
- Refer back to the sales processes you documented earlier - they contain your pipeline steps.
- Do you need stages for Qualification, Analysis, Proposal, Negotiation, etc. Or something totally different?
- Would your business work better with just Open and Closed Won or Lost?

Successfully adopting a simple pipeline is more beneficial than failing to adopt a sophisticated one.

Step 1.4: Incorporate Social Selling, Listening, and Feedback

When reviewing your sales processes, consider whether social media should be a channel you can use to sell to and support your customers. It may not have been a major force when your processes were created.

If you consider it worthwhile, you need to plan how your CRM and support systems use social media alongside phone calls and emails.

- Which social channels are important to your customers? You will need a CRM that talks directly to those channels.

- Do you just want to use social media as another communications channel or do you want it to become part of your marketing programme - "social selling". If so, you will need a suitable tool to sit alongside your CRM - something like Hootsuite or Zoho Social.
- How will you assign staff to manage conversations?
- What hours can you commit to answering questions via social media?
- How rapidly will you offer to respond to questions via social media? Will you - would you want to - commit to responding faster than email?
- Can you develop bots and knowledge-bases to answer common questions automatically, instantly, and accurately?
- Do you want to be proactive in promoting yourselves or just reactive, responding to questions?

Step 1.5: Work with Other Departments' Processes

CRM may serve the sales team more than any other, but it does not operate in isolation. Sales (and CRM) needs to work with:

- marketing about incoming leads,
- production for manufacturing,
- logistics for delivery,
- finance for credit control,
- and many other departments in different businesses.

Investigate how far you can automate the processes that transfer information with other departments.

Step 1.6: Check with Customers and Suppliers

Your CRM may do more communicating with your customers than any other tool. It can nurture them prior to sale, handle orders, produce invoices, and manage support.

Ask your customers what they want - what would make them view you as a good supplier? When do they want updates from you? What format do invoices need to be in? What details do invoices need to contain to get paid quickly? Who are the correct contacts for different aspects of your business? Do they want after-sales service by phone, email, or WhatsApp?

The same principles apply to the other side of your business: purchasing. Although CRM is primarily a sales tool, many CRMs can also handle suppliers and purchase ordering. If that's a route you want to follow, how do your suppliers want to work with you? How can you best interact with their processes so your orders are fulfilled quickly and accurately?

Step 1.7: Create a Data Security Structure

GDPR, PECR and business ethics oblige you to secure the data you keep about your business contacts and ensure it is only seen by the people who need to see it.

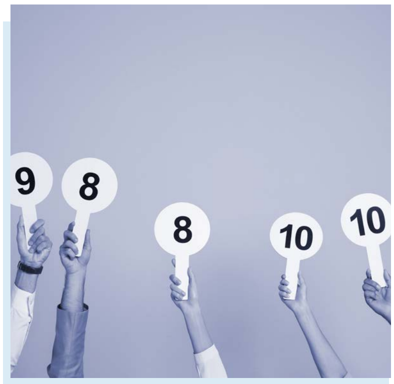
- Do you use 2-factor authentication to protect access to CRM? Tools like Microsoft Authenticator or Zoho OneAuth are perfect for this.
- Who will be allowed to see what data?
- Can they view it, edit it, and produce reports about it?
- Should access rights be different at home and in the office?
- Do you want to restrict access to certain IP addresses (locations)?
- Does access need to be limited to certain times of the day?
- Do you need to record who changes what and when?
- Who can build advanced functions like automations?
- Who can change other users' access rights?
- Can users be joined in functional groups to make management easier?
- Do you have a robust data minimisation plan to remove old and unused data?
- How will you protect your systems from cyber attacks?
- How will you recover from data breaches?
- Do you backup your data to an equally secure location?

5 Step 2: Selecting Your Perfect CRM

Choosing the right CRM for your business is a big decision that can have a lasting impact on your operations, customer relationships, and growth.

Step 2.1: Create an Evaluation Process

By the end of Step 1, you will have a very detailed explanation of what you need from your CRM. Compile that into a single report that specifies which requirements are mandatory and which are only desirable. The sections will be defined by Step 1:



- Sales process
- Marketing process
- Liaison with other departments
- Liaison with customers and suppliers
- Data security and administration

Be careful about your mandatory requirements - could your business really not function without them? Is there no alternative? Mandatory features can scupper a CRM project or make it ruinously expensive.

Create a scoring system for the desirable features but be careful about how complex you make it. In theory, it's best to have a score and a weight for each feature. The weight helps you prioritise some features over others.

In practice, a weighted scoring system is complex and may produce results that simply feel wrong. Like all numeric metrics, scores are not as definitive as they seem.

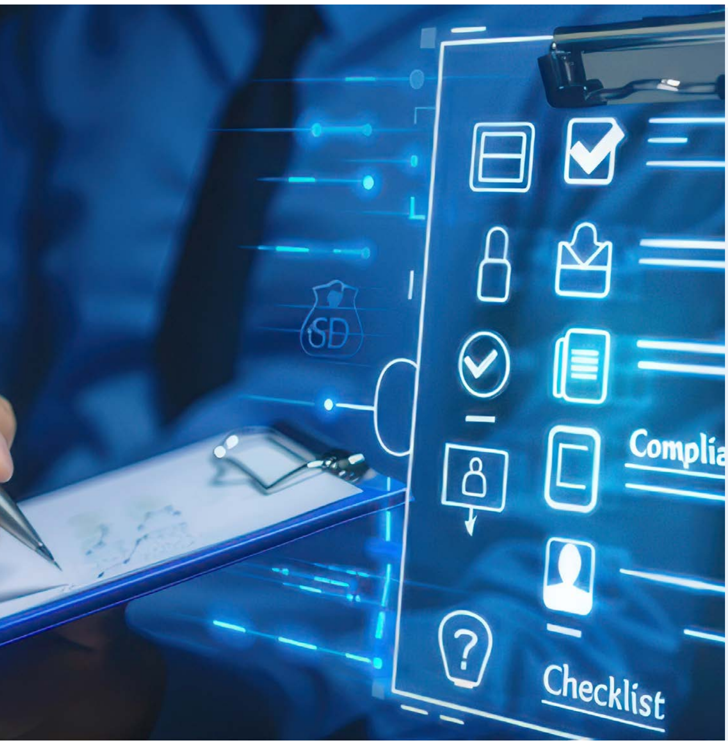
A good CRM system is a combination of three things: your team, your supplier's team, and the CRM software itself. Bolster your scoring system with assessments of the different suppliers:

- Project Cost & Terms
- Support Service & Costs
- Development & On-Boarding Process
- Corporate Reputation
- Relevant Experience
- Project Timescale
- Proposed Team
- Cultural Fit

Step 2.2: Create a Requirements Brief for Suppliers

Decide if you want a CRM system that you will customise and develop yourself or which will be developed and customised by a systems integrator.

- If you have few available in-house skills, the decision is made for you: use a systems integrator.
- If you have a limited budget, the decision is equally easy: you have to develop and customise the CRM yourself.
- If you have few available in-house skills and a limited budget, you have to set your expectations accordingly. The project will take longer and be less customised than it could be.



Compile your list of requirements into a brief for suppliers. They have to know what you need. If you have adopted mandatory/desirable and weighting systems, include those so the suppliers understand your priorities.

Include a timeline both for responses to your brief and for completion of the project.

Suppliers' ability to respond to such a professional brief will be your first clue to their ability to support you.

Step 2.3: Select a supplier and product

After reviewing proposals, select the deployment approach, CRM system, and supplier that meets your needs and fits your business goals. Although it's critical, making the decision is one of the shortest stages in your CRM journey.

6 Step 3: Successfully Implementing a New CRM

Whether you're transitioning from an old system or adopting CRM for the first time, it's essential to get your CRM set up right to ensure a smooth adoption process.

This next section will walk you through the steps to set up, personalise, and optimise your new CRM system for maximum efficiency and impact.

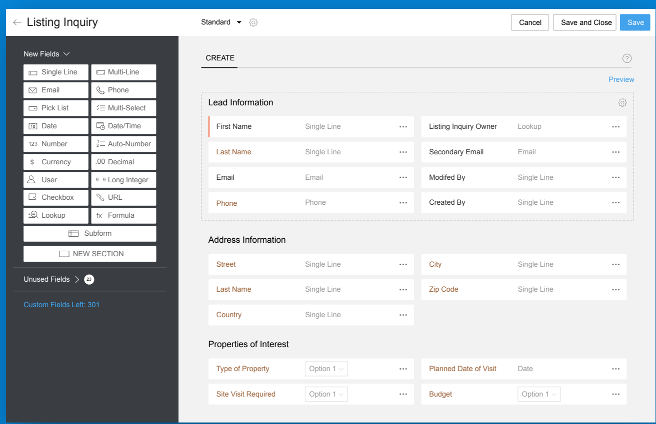
If you are using a systems integrator, many of these processes will be done for you, but you'll still have to provide the information they need.

Step 3.1: Setup Organisation Basics

Now that you've got your CRM up and running, it's time to lay the groundwork. This step is all about setting up the essentials that'll keep everything organised and running like a well oiled machine:

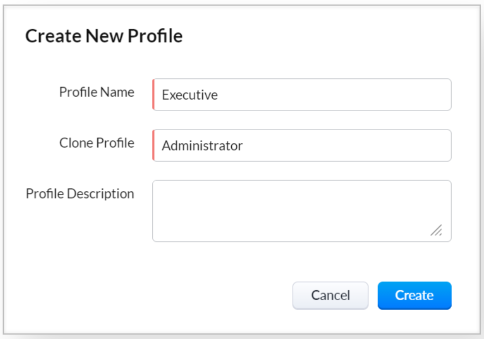
- **The company.** Once you have your new system, set up company basics like address, locations, languages, time zones, currencies, tax codes, and business hours.

- **Disable unnecessary CRM modules.** Most CRM systems have different modules to hold different types of information: people, companies, leads, deals, orders, invoices, suppliers, products, etc. In the interests of keeping things as simple as possible, disable the modules you do not need.



- **Customise necessary CRM modules.** Remove fields that store information your business does not need; who needs a fax number today? Add fields your business does need; you may want to record a customer's SIC code. Alter fields that do not work the way you want: if you want to do geographical analysis, turn country fields into drop-down lists that stop inconsistencies like the UK, United Kingdom, England (or even Egnland). If your process review revealed you weren't collecting essential information about customers (like a mobile number for order updates), make those fields mandatory. Create views for different people so they see what they need to see in an attractive format.

- **Setup roles, profiles, and users.** If you're going to have more than a handful of users, set them up properly. Create roles that determine what different types of data users can see; temporary staff, for example, see less than sales managers. Create profiles to limit what users can do with the data they see; the telesales team, for example, does not need to import files whereas the admins do.

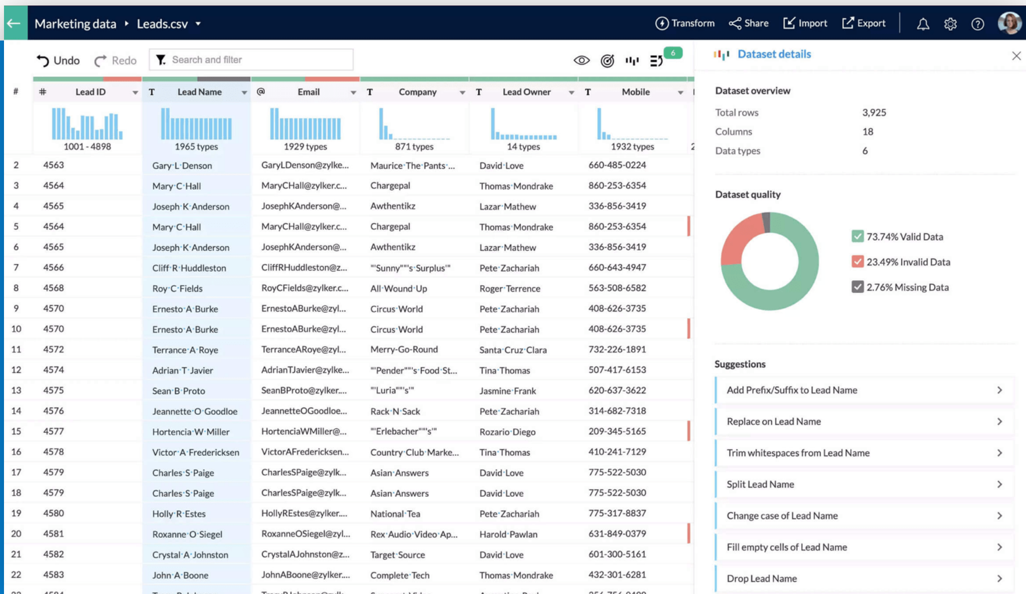


- **Setup access & security.** Extra authentication protects your data and your business. Use more than a password to enter the system. Zoho recommends OneAuth which unobtrusively asks for a fingerprint on the user's smartphone.
- **Setup comms channels.** Setup the channels your sales team is going to use to talk to your customers. Email is the obvious choice. Integrating Zoho Voice for phone calls and WhatsApp might be appropriate for your organisation.

Step 3.2: Cleanse and Import Data

You need to import your business data from the systems that currently manage your sales operations. This might be another CRM system or spreadsheets.

Before you import it, remove inconsistencies, correct poor capitalisations, complete partial addresses, and do as much as you can to give your new system perfect data. Tools like Zoho DataPrep simplify this job by using rules to perform mass updates.



Step 3.3: Use the CRM System

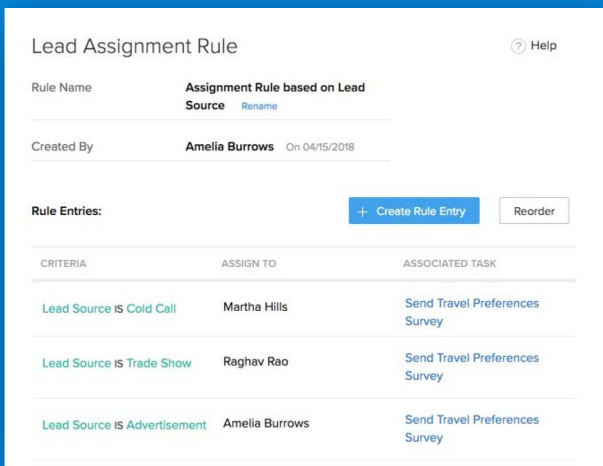
It seems obvious, but a new CRM system will not become adopted unless you force people to use it. Remove access to the previous systems. The more you involve staff in the development process, the smoother this will be.

Step 3.4: Automate, Automate, Automate

Let's face it - nobody has time for repetitive tasks. The key to working smarter (not harder) is automation. By automating lead generation, nurturing, and assignment, you can save time and let your team focus on what really matters. Here's how you can easily set it up:

- **Automate lead generation/nurturing.** Add forms to your website to collect the details of interested visitors. Add those contacts straight into your CRM system. Send a relevant email series to these contacts automatically. You can do this is Zoho CRM, you can do it even better in Zoho Marketing Automation and yes, you can do it in non-Zoho apps too.

- **Automate lead assignment.** Assign new leads to your sales team based on their location, skills, or the stage in the journey. Setup assignment rules in CRM to do this automatically.



- **Automate renewals.** If you offer a service with an expiry date, automate the process that asks for a renewal. This doesn't have to be an impersonal email. It could be a reminder for a salesperson to make an in-person call or visit.

- **Automate escalations.** If a deal is both valuable and flagging, create an automatic process to bring it to a team leader's attention.

Step 3.5: Integrate with Your Other Systems

Link the sales team's CRM software with the marketing automation system used by your marketers, with the project management system used by Manufacturing, with the finance package used by Accounts, with the support system used by Service. Zoho specialises in integrated apps.

Step 3.6: Retrain for Skills Gaps

Training on your new software is essential, but it is just the start. Your sales team needs to understand the new processes you want them to follow. They need to understand the standards and conventions your data governance team has set.

Step 3.7: Continual Improvement

Phase One of your deployment will be the 'must haves' that your business cannot run without. Don't stop there because that only transfers processes from an old system to a new one. It improves little. Phase Two covers your 'nice-to-haves', the process improvements that make your business better.

7 Step 4: Tracking Success with Your New CRM

Once your CRM is set up, it's time to define your goals and track progress. Setting clear, measurable goals ensures you're getting the most out of the system.

Here's how to set actionable goals and measure success.

Step 4.1: Key Performance Indicators (KPIs)

KPIs are the systems of measurement you use to track your success with CRM success. Consider these:

- **Lead Volume:** CRM will receive your business's leads even if it is not the tool used to generate them. The volume of leads will have a major effect on the volume of sales.
- **Lead Conversion Rate:** Measure how many leads convert to customers. Track the conversion rate of different type of leads e.g. cheap leads from web forms compared to expensive leads from exhibitions.
- **Sales Cycle Length:** Track the time it takes to close a deal. Use CRM automation to shorten this cycle.
- **Deals Won:** the ultimate goal of a CRM system is to help you win deals. Track more than the overall number; track deals won by different sales teams, for different product types, and to different customer types. Understanding where you perform most effectively helps you build your growth strategy.
- **Customer Retention Rate:** Monitor how well you keep customers. High retention means CRM is nurturing relationships. High churn - the opposite of retention - suggests your after-sales processes are lacking. Like the Deals Won KPI, compare retention rate for different service teams, product types and customers.

Step 4.2: Actionable Goals

If KPIs are the way you measure performance, your goals are the targets you want your performance to reach. CRM's ability to quickly report on your KPIs means you can set specific, actionable and time-based goals and measure yourself against them.

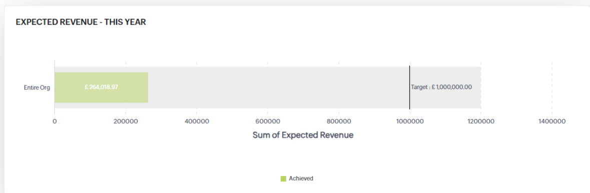
- Increase lead volume from web forms by 20% by August.
- Improve customer retention by 15% (or 6 months) by May.
- Reduce the sales cycle length by 10% (or by 10 days) by December.
- Increase deals won volume (or value - you can measure both) by 15% by March.
- Increase lead conversion from exhibition leads by 10% by December.

Step 4.3: Dashboards and Reports

CRM's advantage is not its ability to store information. Its advantage is its ability to report on information. Instantly. You can see analysis on your phone or your computer, at home or at work, at any time of day or night.

You can use both dashboards and reports to report on your KPIs and progress towards goals. They are subtly different.

- Dashboards present information using graphical formats with drill-down capabilities to see the data that produced them. Because they are real-time and dynamic, exporting dashboard charts is not a common action.



- Reports may include charts, but most only contain tabular data that can be viewed as they are or exported and analysed further in other applications. Like dashboards, they also support drill-down so you can click on a record and see more details about it.

8 How Zoho Supports Your CRM Journey

Getting your CRM setup right is essential, and Zoho is here to make the whole process smooth, simple, and, dare we say, fun?

Whether you're just starting your CRM journey or need help fine-tuning your existing system, Zoho CRM has you covered. Here's how we help businesses like yours plan and implement a top-tier CRM strategy.

Features That Make a Difference

Zoho CRM is a cloud-based customer relationship management software designed to help businesses manage and automate their sales, marketing, and customer support processes. It's built to help you stay connected with your customers, streamline day-to-day operations, and make smarter decisions using powerful insights and automation.

It's packed with features that help you streamline and automate your processes right from the get-go:

Customisable Modules & Fields

Not all businesses are the same, and Zoho CRM knows that. You can customise modules and fields to make sure your CRM fits your unique business needs. Whether it's removing outdated fields or adding new ones, Zoho lets you tailor the CRM to match your processes.

Automation for Days

Automate repetitive tasks like lead assignments, follow-up emails, and reminders. Let Zoho CRM handle the busy work while you focus on what really matters-building those customer relationships.

Sales Pipeline Management

With drag-and-drop functionality, you can track and manage your sales pipeline easily. Zoho CRM makes it simple to see where deals stand, ensuring you never miss an opportunity.

Advanced Reporting & Dashboards

Want to track performance and spot trends quickly? Zoho CRM's dashboards let you monitor KPIs like sales growth, lead conversion, and customer retention. Plus, with automated reports, you'll always know where your business stands.

AI-Powered Insights

Zoho CRM's AI assistant, Zia, helps you predict sales trends, recommend the best times to contact leads, and even flag high-priority deals. It's like having your own business analyst on demand.

Zoho doesn't just give you a powerful CRM system - it's with you every step of the way to make sure everything runs smoothly. Our quick and easy implementation process comes with guides, webinars, and user communities, ensuring a seamless transition whether you're setting up from scratch or migrating from another system.

Plus, if you need a little extra guidance, Zoho's team of experts is always ready to help with consultations, goal-setting, and KPI strategy so you can get the most out of your CRM system. With Zoho CRM, you can count on simplicity, ease of use, and a smooth implementation process to make managing your customer relationships effortless.

ZOHO

About Zoho

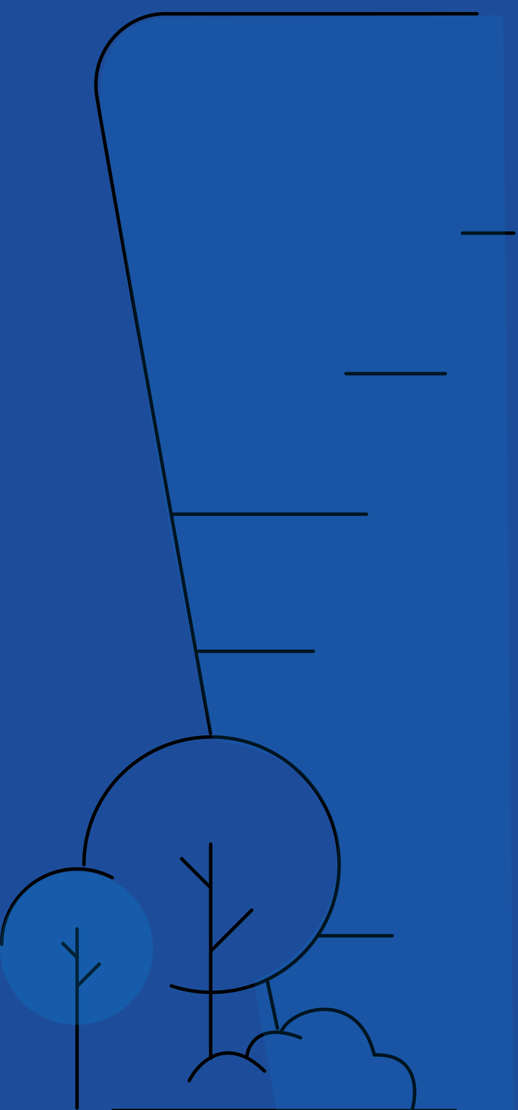
With more than 55 applications in almost all major business categories, including sales, marketing, customer support, accounting and back-office, and a range of productivity and collaboration tools, Zoho Corporation is one of the software companies with the largest portfolio of solutions in the world. Zoho is privately owned and profitable with more than 18,000 employees.

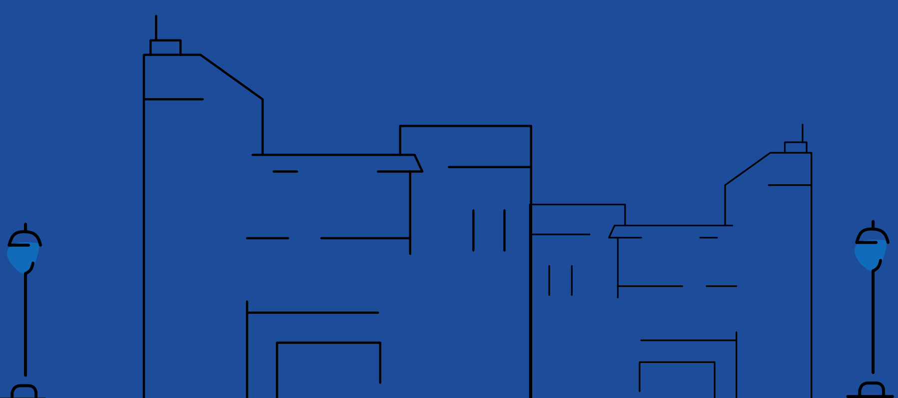
Zoho is headquartered in Chennai, India, and has its European headquarters in Utrecht, the Netherlands. Zoho also has offices in the United Kingdom, Germany, France, Spain, the United States, India, Japan, China, Singapore, Mexico, Australia, and the United Arab Emirates.

Zoho respects the privacy of its users and does not have an advertising revenue model in any part of its business, including its free products. More information about Zoho's commitment to privacy can be found at www.zoho.com/privacy.html.

Zoho operates its own data centres worldwide, including two in Europe. More than 100 million users around the world, spread across hundreds of thousands of organisations, rely on Zoho every day to run their businesses.

Further information can be found at www.zoho.com





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