



# Introduction to Zoho CRM

## What is CRM?

Customer Relationship Management (CRM) can be defined in many ways depending on what an individual intends to achieve. For some, it is the strategy to identify, understand, manage, and cater to the business needs of their prospects and existing customers. For others, it is a system that:

- Helps with capturing all the required information to provide a 360-degree view of customers' interests and preferences.
- Provides various options to manage the sales and marketing processes and to interact and engage with customers regularly.

In both these ways, a CRM system helps a company strengthen and build a long term relationships with its customers. Check out the [CRM implementation guide](#) for step-by-step process to setup your CRM account.

## Why do businesses need a CRM?

Imagine you walk up to your favorite restaurant, 'Home Made Wraps', that you frequently visit, and are greeted by the owner with a big smile! He nods at you and gestures for you to take a seat and informs that your order is 5 minutes away. But, wait a minute, when did you place an order? Well, Roger remembers what you like: your made-to-order cocktail and the favorite savories to go with it. You think, it's just your order he remembers because you visited last week. But, he does that with nearly every second customer who enters his restaurant. Amazing, isn't it? Remembering every visitor's preference is quite a feat because sometimes it may take years to understand their needs and get acquainted with it.

But its different with Roger Philips, the owner of 'Home Made Wraps', he takes customer satisfaction and engagement quite seriously. For him and his team, the customer is the king and they know to go the extra mile to make sure they understand the pulse of every customer and therefore, build a good relationship with them. They keep track of every customer's preferences, their customized orders, preferred chefs and in not-so-rare cases their diet restrictions too!

His job doesn't end here. He needs to be on top of several other transactions like raw material purchase, monthly expenditures, annual growth, and profit tracking too. He must track and value every sale that he makes, so that his annual report doesn't miss out important details. At the same time, he must make sure that his entire team is aware of the business processes and follows it without any deviation.

Managing every aspect of the business can be made easier with a robust CRM system. It should readily understand the business, unite it with the employees and customers alike and capture the business information such that one gets a holistic view of each customer in real-time.

## Benefits of having a CRM system

An ideal CRM system should be multi-faceted that provides:

**Uninterrupted access to customer data** - We understand that prompt responses and immediate solutions go a long way in building a lasting relationship. So, your customer's information is securely stored on a cloud-based platform and your teams can connect with the customers from anywhere in real-time.

**Bring inter-departmental coordination** - Another advantage of having data on cloud is, it can be shared across the teams. You can create customer centric tasks and assign it to the relevant members of your team. This will make sure that every sales person has a defined role and clear objectives, no one is left out or performing the same set of tasks and no sales opportunity will be ignored.

**Streamline different processes** - CRM comes with wide array of features that can help in increasing the sales team's ability to close more deals, assist the marketing team in acquiring more leads, make it easier for support teams to resolve tickets faster; all at the same time.

**Proactively participate in customers' journey** - CRM will help you create milestones and remind you of important events with customers. You can also get insights on the customer's preferences and requirements that in turn will help the sales team organize their strategies for a better and faster customer engagements. Overall, it can go a long way in boosting retention and mitigating churn.

**Make intelligent decisions** - A customer feels valued when the sales team remembers their needs and gives them solutions quickly. CRM can help you draw insights, anticipate possible outcomes, recommend choices, and even suggest next course of action with customers by taking cues from past interactions and data.

## Key functionalities in Zoho CRM

### [Make CRM, your own](#)

Once you have adopted CRM for your business, it's ideal that you modify it to your needs and not the other way around. Zoho CRM is flexible enough to accommodate your business process and allow you to replicate it online. Since, every business is unique we let you build the CRM according to your requirements using the customization features.

### [Watch CRM work for you](#)

An ideal day of a rep would be - step into the office, fire up the laptop and jump-start with the routine tasks. CRM can automate some of those repetitive tasks and save time for other important activities. With some easy-to-setup

automation features, the sales processes can be streamlined and made efficient. Sit back and plan your next business move while CRM continues to work for you.

### **[Connect, communicate, collaborate](#)**

Communication has reached a whole new level and with Zoho CRM you can bring it all under one roof. Be it email, phone calls live chat or social media channels like Facebook, Twitter, all your interactions can be accessed from one place. Your customers and prospects have their presence across multiple channels its best to make sure your business is not left behind and takes strides along with them.

### **[Get it all in one place](#)**

When you have so much to do, you cannot waste time looking for your customer's details in different places. Having them all in a single place, that's just a click away save a lot of time. You can track a client's purchase history, go through notes, view past conversations, and check related emails simultaneously. The contextual view lets you cross-sell products and eliminate the time spent on gathering details from different sources.

### **[Enhance the developer in you](#)**

Certain software solutions might be used to carry out specific functions and you don't have to abandon them in order to use the CRM system. With our string of developer centric features- APIs, SDKs, Functions, Widgets and much more you can bring your software into the CRM and manage everything from one place.

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