



Simplifying sales with Zoho CRM



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The customer journey

“Your customer’s relationship with your product is rarely love at first sight.”

- Peter Dorfman (In his article on customer journey mapping)

Why is this relationship important? When you connect with your target audience deeply, you’ll be able to understand their requirements better, help resolve their problems, and create a sense of mutual understanding.

A buyer endures a long journey before agreeing to make a purchase. It’s therefore essential for sales representatives to invest a lot of effort to gain insight into the prospect’s problems. They’ll need to offer a tailored solution while also gaining the prospect’s trust and developing a relationship with them through every stage of the sales funnel. They’ll have to listen to the needs and concerns of their prospects and consistently follow up.

A sales representative’s core purpose is to clinch the deal. However, prospects don’t turn into loyal customers overnight, and reps therefore have a plethora of tasks to complete before they can close a deal.

Sales representatives interact directly with prospects and customers, glean a better understanding of what will help

them through their interactions, and tailor the solution being offered accordingly. It's crucial for any business to have a great sales team; but without an effective sales process, a business can't succeed.

In this book, you'll look into the responsibilities of a sales rep, the different kinds of challenges they face, and how they can be overcome with the help of an effective sales process.

Responsibilities of a sales rep

A sales rep tends to have a wide range of responsibilities, starting with contacting all prospects and customers listed in their daily target sheet. Serving as the bridge between businesses and their prospects and customers, reps need to promote their company's products and services as a solution up until they can finally make a sale.

Some of their key responsibilities are as follows:

- Strategize, create follow-up plans, and build relationships with prospects and customers through consistent follow-ups
- Provide complete solutions for every customer in order to increase revenue, boost customer acquisition levels, and improve profitability

- ☑ Verify customer data entering the customer relationship management (CRM) platform to avoid data duplication
- ☑ Deliver seamless and hyper-personalized user experiences at every phase of the customer journey
- ☑ Schedule demonstrations and make client visits



How do sales reps fit into the customer journey?

When someone comes across your business, you can't expect them to make an instant purchase—unless they trust you and are sure they're benefiting from doing so. It's therefore important for your company to build prospects' confidence through lead nurturing, a crucial aspect of the customer's journey that your sales team needs to map out.

Sales reps guide customers through their entire buyer journey, a process which begins by making them aware of the solutions on offer, and helping them consider, evaluate, and finally decide whether to purchase the product or not. Reps need to understand customers' requirements and, in turn, help them understand how the product can help satisfy those requirements. In other words, reps build relationships with customers.

Challenges reps face

Companies may have detailed processes in place for sales reps to follow up with their leads. However, when it comes to the execution of a specific process, reps face multiple challenges that cause process delays and thereby hinder their ability to win deals. It's therefore essential that businesses use efficient tools to carry out their responsibilities and to close deals.

Let's look at the different challenges that reps face and how Zoho CRM can serve to help them overcome them:

1

Difficulty prioritizing prospects

Lead nurturing is a sales rep's primary task, and it involves engaging and following up with prospects and customers on a daily basis. Hence, it's crucial that businesses have a process in place that will help reps ease follow-up efforts.

Take, for instance, the example of Zylker Auto Mart: a business that sells second-hand cars and car parts. On a daily basis, reps spend an enormous amount of time scrolling through their entire lists of leads, trying to determine which ones need to be prioritized during follow-up. This can take up a lot of their time, thus delaying the process of closing deals. Even further—without a structured business process in place, some reps tend to miss out on important steps that need to be carried out during follow-ups.

Following up, simplified

Sales representatives at Zylker Auto Mart can track prospects in the Leads module in Zoho CRM, and customers in the Contacts module. By selecting the kanban view, they can see all the data they need at a glance—organized for easier comprehension. They'll therefore have better visibility into potential bottlenecks and the ability to fix them more effectively.

Second Hand Car ₹ 0.00 . 2 Leads	Car part ₹ 0.00 . 2 Leads	Both ₹ 0.00 . 1 Leads
Jennis Korat +1-404-555-0179 📞 ₹ 0.00	Sheena Marco +1-404-555-0160 📞 ₹ 0.00	Mike Kenderson +1-404-555-0179 📞 ₹ 0.00
Sourav M +1-404-555-0179 📞 ₹ 0.00	Kris Konder +1-404-555-0179 📞 ₹ 0.00	Jennis Korat +1-404-555-0179 📞 ₹ 0.00

On the other hand, by using filters, reps can prioritize important leads in order to close deals faster.

Filter Leads by

Product of Interest

is ▾

Second Hand Car ▾

Proximity to Store

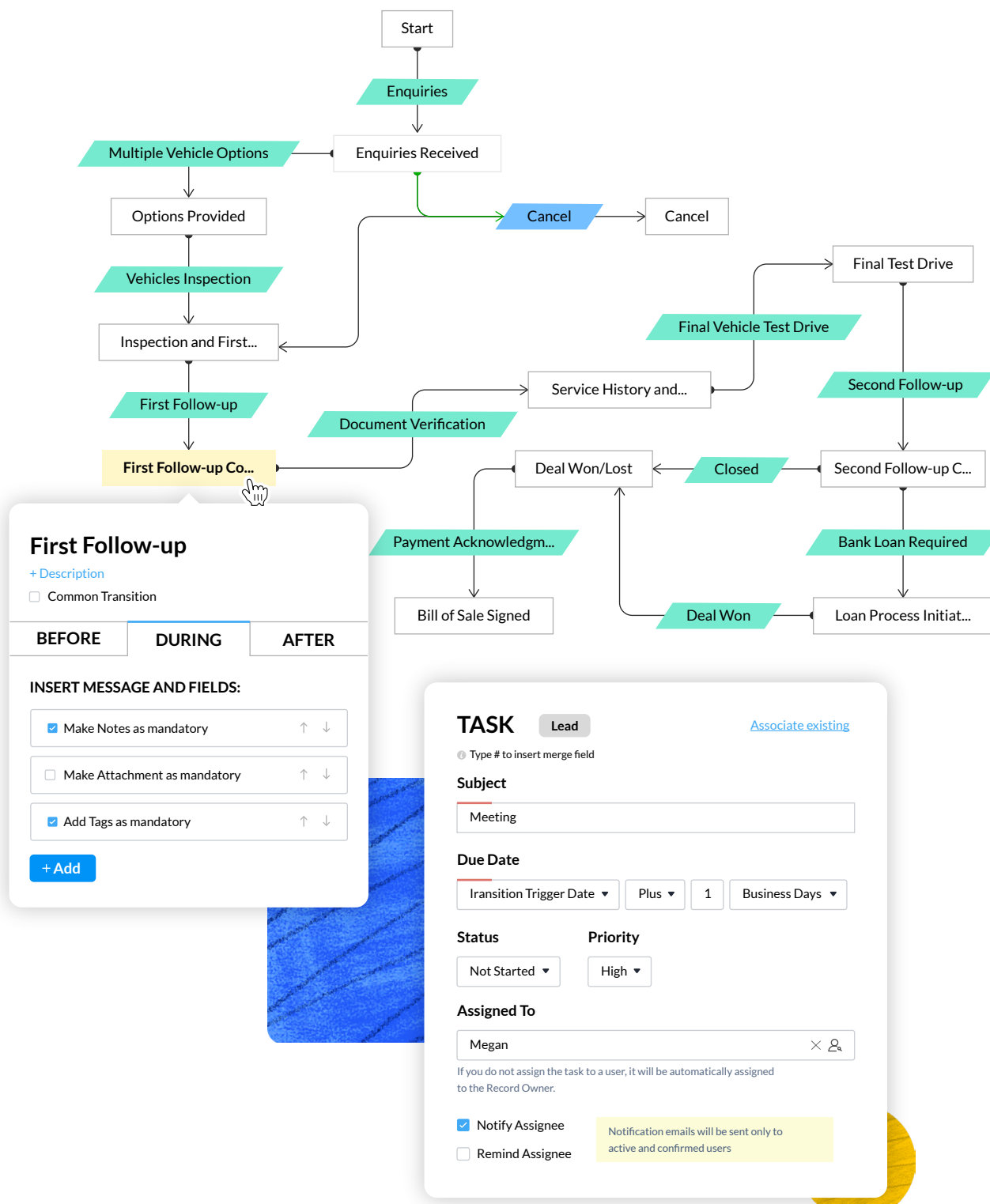
is ▾

Another City Within City ▾

<input type="checkbox"/> Lead Name	Email	Phone	Lead Owner
<input type="checkbox"/> Sourav M	souravmm@gmail.com		Anna Sakhi John
<input type="checkbox"/> Jennis Korat	korajen@gmail.com	1234567898 📞	Anna Sakhi John

<input type="checkbox"/> Lead Name	Email	Phone	Lead Owner
<input type="checkbox"/> Kris Konder	kkonder@hotmail.com		Anna Sakhi John
<input type="checkbox"/> Sourav M	souravnn@gmail.com	1234567898 📞	Anna Sakhi John

With the help of Zoho CRM's Blueprint feature, Zylker Auto Mart has created an online replica of its business processes. By determining each stage and specifying the steps that need to be carried out, the company can ensure that there are no glitches in lead nurturing or other processes.



First Follow-up
 + Description
 Common Transition

BEFORE | **DURING** | **AFTER**

INSERT MESSAGE AND FIELDS:

- Make Notes as mandatory
- Make Attachment as mandatory
- Add Tags as mandatory

+ Add

TASK Lead [Associate existing](#)

Type # to insert merge field

Subject
Meeting

Due Date
Transition Trigger Date Plus 1 Business Days

Status Not Started | **Priority** High

Assigned To
Megan

If you do not assign the task to a user, it will be automatically assigned to the Record Owner.

- Notify Assignee
- Remind Assignee

Notification emails will be sent only to active and confirmed users

Working in silos

Traditionally, each team in an organization often works in a silo—a practice that tends to affect the organization’s lead management process. In such cases, when teams are managed separately, data can be lost or duplicated, which ultimately makes it difficult for sales reps to carry out their follow-up process smoothly.

Redundancy and inconsistency avoided

The sales team works on nurturing prospects that express interest in the company’s products, as well as following up with customers. Other teams such as the pre-sales and customer support teams need to know who the prospects are, their interests, and their status in the sales process.

Without that information, the various teams are vulnerable to inconsistency or redundancy—which is a consequence of working in silos. With Zoho CRM, however, each team can verify prospect/customer data that has been registered. Let’s look at a scenario.

A prospect requests a demo. The pre-sales team takes over. In the record details page, the sales rep has noted down all the prospect’s requirements in the notes section.

Notes



Requirements - Customer owns a Skoda Octavia 2.0 AT
They want to purchase a vent tube, a fuel filter, and a Flywheel

They are seeking mechanic aid and want to understand the cost factors.

Lead - [Kris Konder](#) • Add Note • now by Anna Sakhi John

Thankfully, this means the prospect won't have to supply this information to the pre-sales rep again. Additionally, if the sales rep has discussed any discounts with the prospect, for example, reading the sales rep's notes will help the pre-sales reps maintain that offer and thus avoid inconsistency.

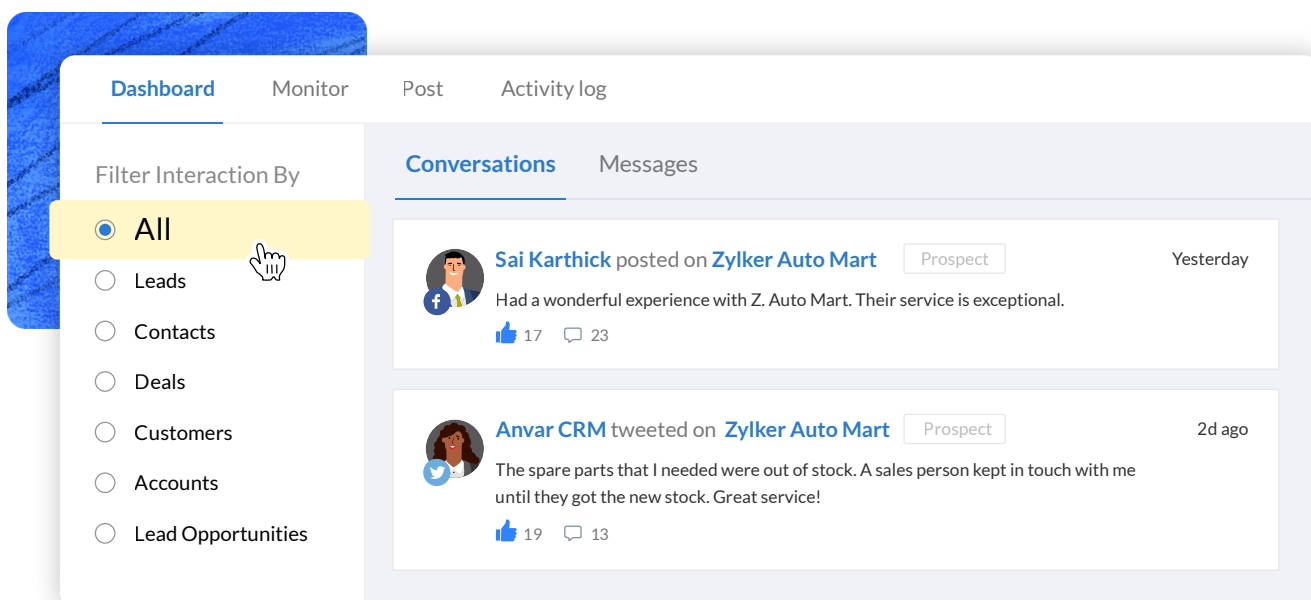
3

Social media only for marketing

One of the biggest challenges that sales reps face today is understanding how to use social media to sell. Most companies use social media channels to market their products and services; however, if they don't use these platforms to engage with their prospects and customers and build relationships, they won't be able to sell. Even though social media has been around for some time now, not all reps may be entirely comfortable with the switch from cold calls to communicating via social media, which can also repel prospects.

Social selling simplified

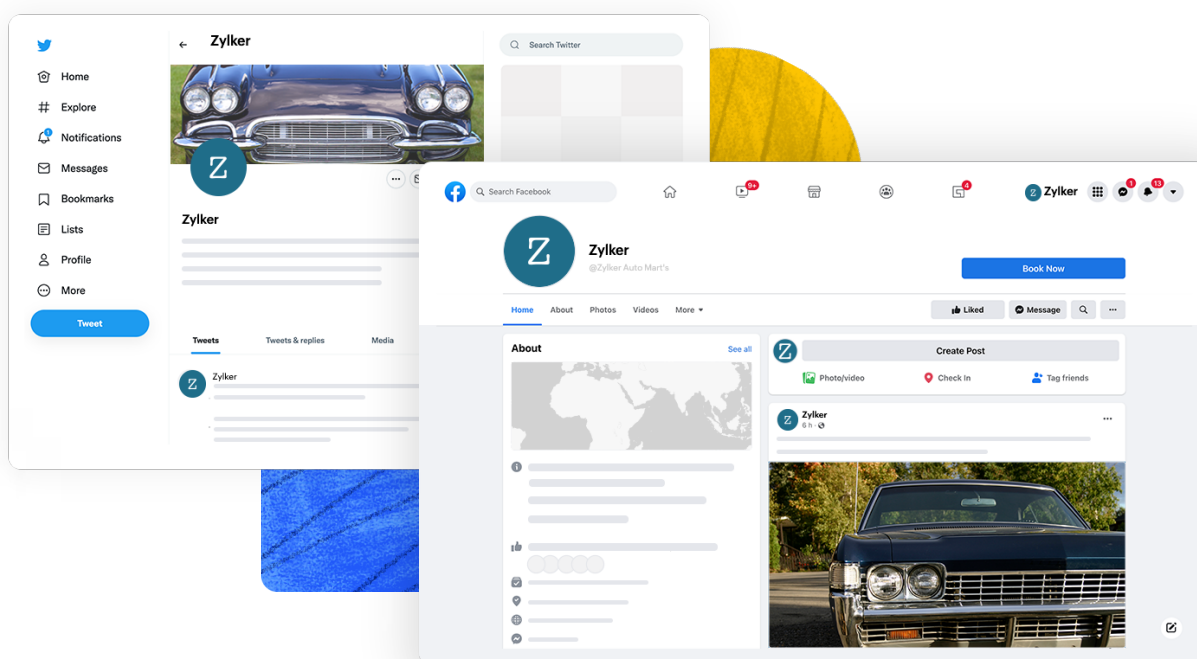
The sales reps at Zylker Auto Mart weren't too comfortable with the switch from cold calls and sending emails to social selling because it required that the reps manage multiple social media profiles, in addition to keeping track of their interactions with prospects and customers across all platforms. However, with a CRM in place, social selling becomes easy. Reps now have context during the nurturing process. They can enable social listening and thus keep track of any conversations about their company taking place on social media platforms—all while managing multiple social media profiles.



4

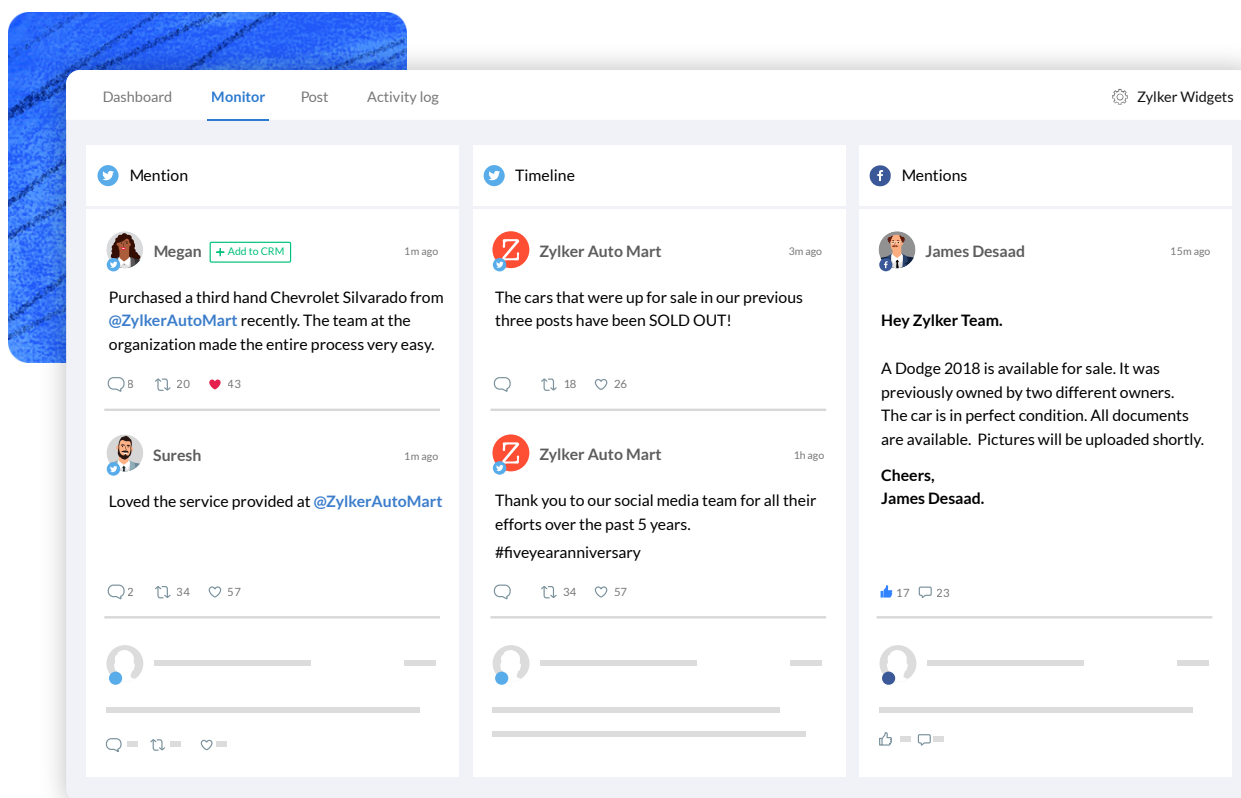
Keeping track of multiple channels

Sales reps need to communicate with their prospects and customers constantly to build relationships with them and eventually make sales. However, if they have to restrict their communication to a single channel, it could hinder their ability to interact with every prospect/customer.



Multi-channel approach from a single platform

Since sales representatives at Zylker Auto Mart need to respond to all the messages and comments posted by prospects and customers on multiple social media channels, they're better off using a multi-channel approach. Thanks to Zoho CRM's integration with Zoho Social, reps can keep track of all communications from within a single platform, thus enabling them to deliver a superior customer experience.



5

Missed appointments

With the lack of automated reminders, the sales team at Zylker Auto Mart has been missing some appointments and follow-ups, which has affected their lead nurturing process and, in turn, resulted in lost leads. While keeping customers informed of any offers or promotions is crucial for any business, the lack of any means to automate messages and notifications has served as a major impediment for the sales team.

Keeping track of tasks

In any business, sales reps are usually charged with a variety of tasks, such as field visits, frequent emails, and phone calls. Keeping track of all these tasks—both trivial and significant—and ensuring that they're organized, can prove to be quite challenging. The Calls, Tasks, and Meetings modules in Zoho CRM provide a clear view of upcoming tasks, sorted by each prospect or customer.

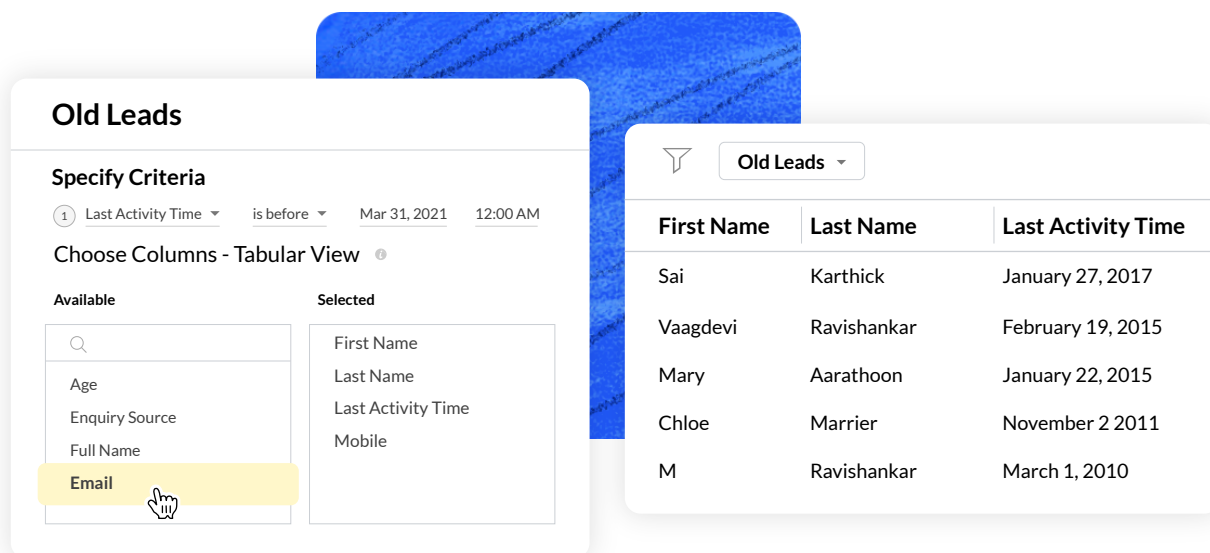
6

Lost leads

There may be instances in which some prospects decline to make a purchase for various reasons, while expressing interest in revisiting it later. This can be six months, a year, or more after the first follow-up. However, tracking those specific leads from a long list of prospects and customers is not easy. It can result in the reps missing out on some important leads.

Trace older leads

With Zoho CRM, reps can zero in on those leads (with the help of advanced filters) to follow up. They can easily generate a list of leads that haven't been actively contacted within a specific time frame and quickly send them emails, assign them to a new rep, or apply any other follow-up action.



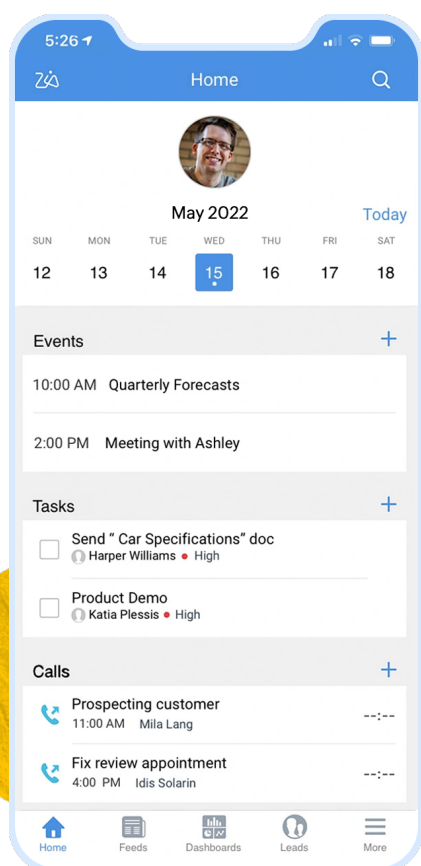
The screenshot shows the 'Old Leads' filter configuration and the resulting list of leads. The filter is set to 'Last Activity Time' is before 'Mar 31, 2021 12:00 AM'. The columns selected for the tabular view are First Name, Last Name, and Last Activity Time. The resulting list shows five leads with their respective details.

First Name	Last Name	Last Activity Time
Sai	Karthick	January 27, 2017
Vaagdevi	Ravishankar	February 19, 2015
Mary	Aarathoon	January 22, 2015
Chloe	Marrier	November 2 2011
M	Ravishankar	March 1, 2010

7

Inability to keep track of all activities and update client information while on the go

Most sales reps are constantly on the move. Ensuring that they can make their follow-up calls, update tasks, and events while traveling can be difficult. Keeping track of all their sales activities itself can be quite a challenging task. Or imagine they're travelling after a meeting with a client and they need to update the client's information. Do they wait until they return to their office space to do so?



Mobile CRM to the rescue

Say you're out of office and wish to reach out to a client; you can do so right away the Zoho CRM mobile app. You can also log calls and take notes, or record voice notes and convert them to text. Using the app, you can also keep track of all your sales activities and get relevant customer data, deal information, and contact history—all on your mobile screen. You can also add or modify customer data in real time when you're offline.

Once you connect to a network, it will automatically sync across devices.

8

Understanding customer preferences can be a challenge

Sales reps tend to deal with many clients on a daily basis. Understanding the requirements of so many customers and tailoring solutions for them can be challenging. Say for instance, a customer is looking for a villa apartment with five bedrooms, a swimming pool, an open terrace, and a large garage. Manually identifying other properties with those attributes can take up a lot of time.

AI saves the day

With recommendations from Zia, Zoho's AI assistant, the agent can offer suggestions that closely match the client's preferences. Zia analyzes the customer's stated preferences and then suggests other properties that have similar attributes—thus reducing the manual efforts required for the same.

9


Monotony, immense pressure, and lack of motivation

Sales reps' work can be extremely stressful. Not only do they work long hours, but they also face a lot of potential failure. Sometimes their efforts go unnoticed, which can be extremely demotivating. Facing such challenges, if their work becomes monotonous as well, it can affect their performance negatively.


Motivator

Most organizations are always looking for ingenious ways to coax better performance from their teams. The best way to get sales reps going is to motivate them through intriguing competitions that track performance.


These can come in various forms. With the help of CRM's Motivator feature, you can turn goals into actionable targets. Create games for teams or reps to make work fun, where the criteria are based on existing or custom key performance indicators (KPIs). You can also ensure that no achievement goes unnoticed. The motivator performance is all summed up in an achievements panel, which shows the different trophies and the points won.




Andrew Hardacre
Zylker Auto Mart




Master
300/500




Elite
300/500






Gold
300/500



Silver
300/500



Bronze
300/500

Trophies	Position	Game Name	Points	Record	Duration
	3rd	Marketing Team Game	10	180	Jan 12 - Jan 14
	2nd	Quarterly Game	10	230	Jan 12 - Jan 14
	25th	Quarterly Target Game	10	122	Jan 12 - Jan 14

Conclusion

Whether it's replying to emails, attending meetings, handling calls, or going on field visits, sales reps juggle a lot on a daily basis. Not only do they need to build relationships with the prospects and customers to make a sale, but they also need to keep track of their tasks and targets, recall previous interactions, and much more. A CRM, therefore, is incredibly useful in making reps more productive.

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