ZOHO CRM Plus

REACQUIRE
RETAIN
GET IN TOUCH

Possibilities with Zoho CRM Plus

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Digital era of businesses

Business communication has evolved in the digital world. Customers can now reach out to you via many channels including emails, social media, your business website, live chat, and more. This is all thanks to constantly evolving technologies. While it is important to leverage these communication channels so your customers can reach you, it is equally important to provide them the best possible customer experience at every stage of your interaction.

Leveraging customer data across multiple touchpoints

Customer information is key for businesses to understand customer behavior and cater to their requirements. It all starts with capturing a solid record of customer data and making effective use of it across all possible touchpoints for communicating with your customers.

Purpose of CRM

To convert customer data into insightful business metrics, most businesses use a CRM system, a cloud-based sales application, to gather lead and customer data. Although CRMs began as storehouses for customer information, they have now evolved based on the principle of maintaining good relationships with your customers. From bringing leads into your business, to nurturing those leads into customers who bring a return for your business, a CRM has all it takes to increase the sales margin of a business.

The silo effect

While a CRM system helps align and manage your customer relations, businesses may also choose to use separate applications to manage different departments, such as Sales, Marketing, and Support. Although these applications serve their purpose individually, they can quickly lead to silos, with no communication between the customer teams. Using different applications means approaching different vendors, working with them on different platforms with different logins. All of this can get overwhelming, especially when you are looking for a particular piece of customer information or trying to improve your customer's experience.

For example, let's try and answer these questions:

1. As a sales executive, do you know the last time your customer visited your business website so you can engage with them at the right time?

2. As a marketer, do you know which marketing ad or campaign generated the highest sales revenue so you can plan more campaigns like it in the future?

3. As a support rep, are you sure whether customers who reported an issue with your product are being given a timely response and contextual support so you don't end up losing them?

Answers to these questions are hard to arrive at unless all customer-facing teams work together.

Let's make it easier. Take a look at this comparison chart that tells you what it means to run your business with siloed applications compared to a unified customer experience platform.

Area	Siloed applications	Unified customer experience platform
Administration	Separate administrators	Separate administrators and a super admin to manage the administrators
Setup	Spread across applications	Unified setup
User permissions	Separate user permission	Single user permissions provision via admin panel
Price	Different price for each application. Expensive	Single price
Billing	Complex billing structure	Single billing
Implementation time	High implementation time	Low implementation time
Collaboration	Difficult to collaborate	Cross-team collaboration across sales, support, and marketing.
Accessibility	Multiple logins with multiple tabs	Single interface and sign-in
User experience	Complex	Seamless

Introducing Zoho CRM Plus

Zoho CRM Plus is a unified customer experience platform that connects your sales, marketing, and customer support teams effectively, allowing customer information to seamlessly travel from one team to the other.

Zoho CRM Plus includes the following services that cater to meet your customers' requirements from diverse perspectives such as sales, marketing and support.

- Sales automation, pipeline management, and managing customer relations with CRM

- Visitor tracking and proactive live chat for communication and engagement with SalesIQ

- Provide timely responses and context-aware customer support with Desk

- Project planning, team collaboration, work delegation, and resource management with Projects

- Optimized email marketing, lead nurturing, and email marketing automation with Campaigns

- Increase brand awareness and centralized social media management with Social

- Brand power building and customer satisfaction with Survey

- Sales analytics and target and metrics management with Motivator

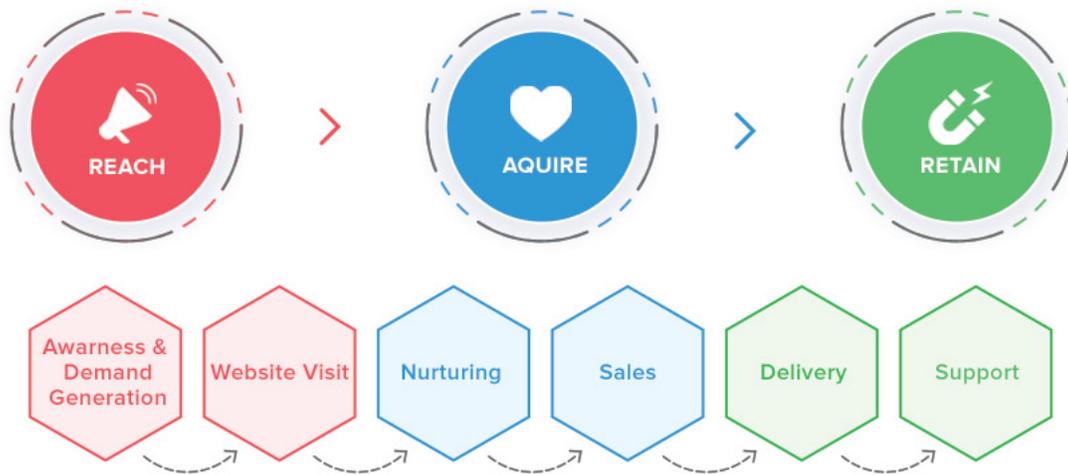- Business intelligence data analysis and insightful reports with Analytics

Whether you're reaching out to prospects, closing deals, or offering support and retaining loyal customers, Zoho CRM Plus is with you in every phase of the customer life cycle.

Zoho CRM Plus also helps you resolve complex administration problems that are part of a siloed ecosystem and can take a lot of administration effort. We help businesses deliver exceptional customer experiences to their customers while also giving them a great user experience. With Zoho CRM Plus, organizations have fewer obstacles to creating the best customer experience possible.

Typical customer journey

From when they enter your business as a lead until they are converted into a regular customer, there are several stages your customers go through.

These stages often link back to three major goals which are:

Reach:

Your marketing material and content need to be in places where consumers will find them. Reach is the first step in the lifecycle because it develops awareness right away.

Brand awareness:

A typical customer's journey starts from the advertisements that you post on your official website and other key sites that your customers are likely to visit. The customer' may start exploring your product from advertisements on their favorite website or a piece of content you created discussing industry innovations.

Acquire:

Understanding your brand, the products you offer, and what type of person will buy them will help with acquisition. Contacting customers directly with personalized communication improves the chance of future conversion.

Nurturing:

While lead generation is boosted extensive marketing efforts and creating interest in your products or services among potential customers towards, it is nurturing your captured leads which will turn them into paying customers.

Retain:

Retention requires satisfying your customers' needs, caring for them, and cultivating the relationship. If you can take a customer's feedback and use it to improve a product or service, you not only make them feel important but also make them more likely to return.

Customer support and retention:

A good business is not just about making regular sales but is also about providing extensive support to your customers after every sale and beyond.

Possibilities with Zoho CRM Plus

Most businesses can be reduced to three crucial business goals:

1. Closing more deals and getting more business.

2. Providing the best possible customer support and ensuring customer retention.

3. Understanding business performance via analytics.

This workbook will cover how you can use Zoho CRM Plus to align your sales, marketing, and support teams, achieve your business goals, and cater to your entire customer lifecycle.
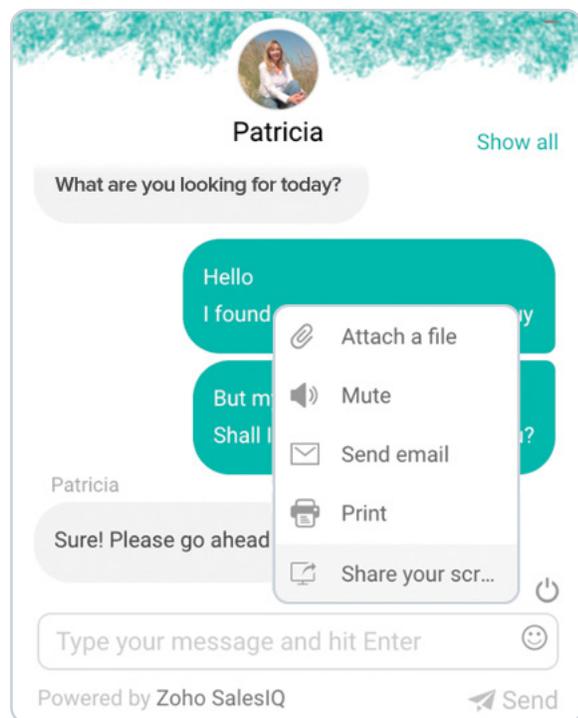
Closing more deals and getting more business

1. Start with your digital identity.

Optimize your business website's performance and acquire meaningful leads.

Zoho CRM Plus helps connect your website to other touchpoints of the customer journey like marketing campaigns, CRM, and customer support.

For example, you run a business and have already created a great website, where you tell visitors all about your brand and try to convince them to try your product or service. You might also have a Contact Us page where you leave your contact details for your visitors to reach out to you. But is that all that your website can do?

Here's how Zoho CRM Plus helps boost your website ROI:

Proactive website engagement and communication with our live chat interface in SalesIQ

SalesIQ's live chat interface helps you connect with every visitor who comes to your site by opening a platform for them to talk to your business, ask any questions they may have, or complain about a problem they are facing.

When you embed the SalesIQ code on your website, you can initiate a proactive conversation, asking your prospects if there's something specific you can help them with, or initiate a chat with them about the product they're currently looking at. This increases your chances of sourcing relevant and meaningful leads.

Zoho CRM Plus lets you push visitors who you have had promising conversations with to your CRM as leads with all the context of their visit to your website intact. This means that when your salesperson looks at one of these leads, they will know that the lead source is your website and they can see the product name or type the lead was looking at.

Automated chat assistance 24/7 with Zobot

In addition to live chat, you can also choose to implement Zobot, an automated customizable chatbot that can engage with your customers for you. For example, if your business does not have enough salespeople to monitor your website visitors, Zobot can take care of them.

After capturing key details of each visitor and what they came looking for, Zobot can push the conversation to your CRM and add the visitors as valuable leads in the Leads module.

Did you know?

With SalesIQ you can also track whether visitors are coming to your website from a specific marketing campaign. This can be useful for your marketing teams to know whether they should plan more similar campaigns.

Here's how your business website can benefit from embedding the SalesIQ code:

- A more open-ended way for customers to reach out to you via webforms or live chat.

- Get more promising leads for your business by converting interested visitors into leads, which can improve conversion rates

Understand website visitor behavior with SalesIQ's visitor tracking

Now that your website visitors are engaged via live chat and Zobot, here's the next question. How sure can you be about:

- Which pages of your website have been visited most?

- Which particular product have visitors clicked on most often?

- How long each visitor stays on your website?

Tracking these crucial website actions is important so that your business can provide your customers with an exceptional website experience.

Visitor tracking in SalesIQ provides you with a comprehensive view of all your visitor behavior, to help you dissect information like:

- Whether they are new visitors or existing customers.

- How much time a visitor spends on your site on average.

- An list of visitors who left your website to help you understand their purchase behavior.

- Monitoring of visitor behavior with our concentric circle view.

- Powerful analytics like helping you understand your geographic spread, which means you can understand which country brings you the most traffic.
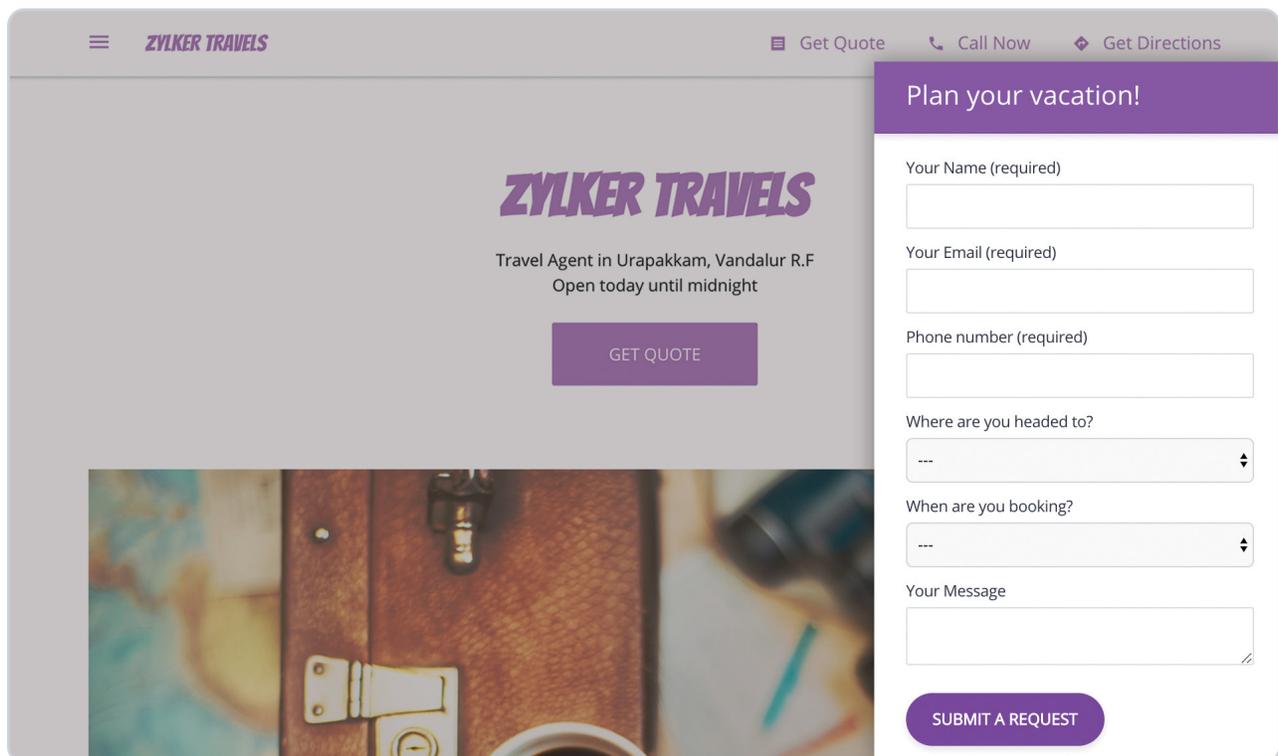
2. Collect crucial website visitor information with webforms

In addition to live chat and Zobot, it is also important to have an offline channel to listen to visitors' specific business requirements. For example, if your business has specific content on your website that caters to different industry segments, webforms are a great way to collect specific information about exactly what a prospect from a particular industry is looking for.

You can ask for specific information that includes the visitor's business industry, region, company strength, and other details to serve them better in your next engagement.

For example, you have a prospect in the retail industry who is looking at your services for, you can embed a webform to collect information such as the prospect's name, company, phone, email, and region along with specific details about what they are looking for to help you understand your prospect's business requirements.

Once you have captured these crucial details, webforms can pass them directly to CRM, where you can assign a sales rep to the lead and ask them to schedule a demo.

Did you know?

Your crucial leads engaged via live-chat can be marked on top priority by your sales reps, to get timely attention from your sales/support teams and help close deals faster, and also get priority assistance when they return to your website.

Convert your website visitors to subscribers for your email campaigns, with sign up forms in Campaigns

Your business website gets a lot of visitors every day. Not every visitor who comes to your website for the first time will be ready to decide whether to become your customer. These visitors, who are likely to convert into customers if nurtured with a series of email campaigns that talk about your business offerings in detail, are an important category.

Campaigns in Zoho CRM Plus provides you with sign-up forms that you can embed on the subscription page of your website to allow these visitors to sign up for more information.

When visitors fill their details into these sign-up forms, they will be added to Campaigns as subscibers and will be sent newsletters and other marketing emails periodically.

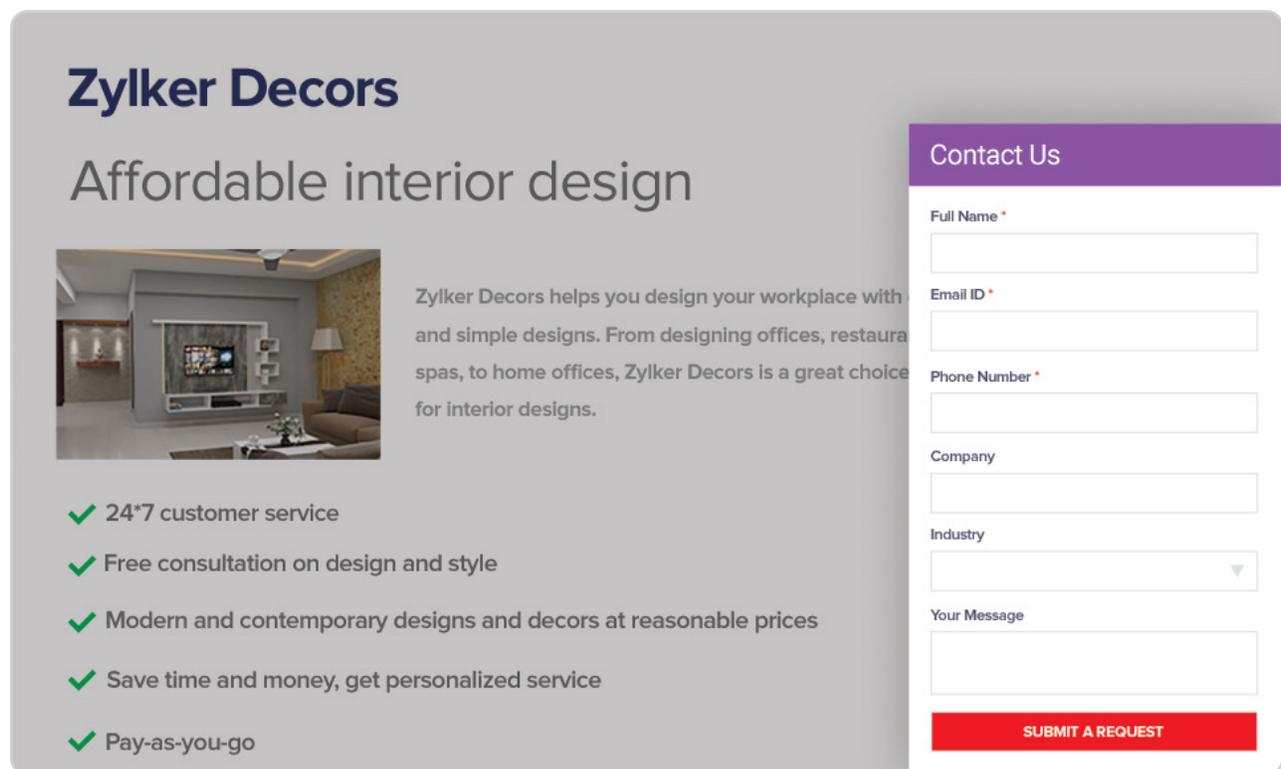# 3. Gain visibility on the ROI of your Google Ads investment

If your business has a good marketing team and has invested in Google Ads, you may be able to see the keywords people searched for when they found your business, but you may not know whether leads coming in from Google Ads are converting to actual sales.

On the other hand, if your marketing services are completely outsourced to a third-party vendor, you may only know that you have been paying your marketing vendor every month, but you may not know how the money you spend on your marketingis converting to actual sales.

To help bridge the gap between your Google Ads and customer data, you can link your Google Ads account with your CRM.

Here's how you can evaluate your Google Ads spends in relation to the ROI:

Let's say your business is an interior decorating firm and you have invested in Google Ads as a paid advertising channel, paying for keywords such as "affordable interiors" and "office interiors" which you feel are relevant keywords for people to land on your website.

Every time someone searches for "office interiors" on Google, your ad is shown to the visitor. A visitor would then click on your ad and be taken to your website or the landing page that you designed for that purpose.

Because you have embedded a webform which is linked to your CRM, the visitor can leave their details and state their requirements, and will then be added to your CRM as a lead. Along with the visitor's contact details and furniture requirements, you can see:

- The lead source (Google Ads)

- Which particular ad brought them to your website

- Which keyword they searched for on Google

- The date they clicked on the ad

- Which device type they searched for your business on

- The cost for this click

LEAD NAME	COMPANY ⌃		LEAD SOURCE	PHONE	EMAIL
Tony Wayne	Acme Inc.		Google Ads	(888) 555-4466	tony.wayne@acme.com
Toby Belch	E Trade Group Inc		Google Ads	(876) 897-6754	toby.belch@etrade.com
Clark					
Emm					

Google Ads Information

GCLID	CK3d55arjr8CFRAV7AutbQB		Keyword	Office Furniture
Click Type	Headline		Device Type	Mobile
Ad Network	Search Network		Search Partner Network	Google Search
Ad Campaign Name	Contemporary interiors		AdGroup Name	Interior Design
Ad	Contemporary Interiors		Cost per Click	$ 15.00
Ad Click Date	06/05/2020		Conversion Exported On	09/05/2020
Cost per Conversion	$ 100.00		Reason for Conversion Failure	
Conversion Export Status	Success			

With these details, you can identify which ad and ad group are contributing the most your sales and get a complete ROI breakdown of every ad and ad group that your business has invested in.

4. Customizing your CRM to get ready to sell

Because no two businesses are the same, we understand that your CRM will require customization which can range from basic custom modules or fields to advanced layouts and special views and collaborative portals.

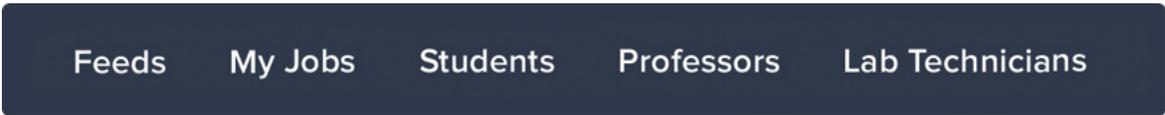**Here's how Zoho CRM Plus can adapt to the unique needs of your business.**

Custom modules

Modules in CRM are tabs where you can store customer records. CRM has four primary modules: Leads, Contacts, Accounts, and Deals. The leads that you acquire for your business can be stored as records in the Leads module.

The following examples show how you can customize your modules according to the specifics of your business and industry.

1. Educational sector

If your organization is in the educational sector, you may want to maintain a list of all the applicants who have registered with you. To do this, you can create a custom module called **"Applicants"** rather than maintaining that data under **"Leads"**. You can then create other custom modules such as **"Students", "Professors", Lab Technicians", "Semesters"**, etc., based on your specific needs, so you can organize your CRM data in a way that makes sense for your organization.

Likewise, an organization in the real estate sector might have modules such as **"Property Listings", "Tenants",** and **"Buyers"**, while a business in the insurance sector might have modules such as **"Insurance Policies"** and **"Loans".**

Layouts and fields

Layouts are forms which store the information from your records in various fields. CRM has a standard layout containing 22 field types to add details about each lead.

You can also customize and create a completely new layout for your specific business industry.

For example, if your business is in the real estate industry, you may want to maintain different layouts for different types of properties that you handle, for example:

- One layout for residential properties
- One layout for commercial properties

Each of these different property types would have different fields to collect specific information.

For example, your residential layout could have fields like **"Building area", "Number of rooms", "Locality", "Property age", "Availability to occupy".**

The commercial layout might contain fields with picklist values for **"Property type"** with picklist options like **"Office space", "Restaurant", "Boutique", "Agricultural land"** and have subforms for each category.

Subforms

Once you have created layouts for listing commercial and residential properties, you may also want to add additional information for certain fields.

Interior Design				
Property Type	Number of rooms	Location	Styles	Color palette
Farm House	5	California	Art Deco	Blue
Individual House	4	New York	Modern Style	White

For example, in the real estate sector, we created a module for "Property Buyers", with two layouts: Residential and Commercial. Let's say a residential property buyer is interested in purchasing a farm house and wants to specify some interior design preferences in the form. These details can be added along with other related information in a subform.

Using subforms can help you avoid your layout forms from becoming cluttered by adding multiple line items where you enter property specifics.

Here are some other cases where your business can use subforms:

Education Sector: A subform to associate academic details to a student.

A student application form may require the applicant to fill in a section for Academic Details and Previous Employment Details. This information can be contained in a subform where you can capture details about the employer, job title, and job description. While the primary form is all about the student, the subform is about their previous jobs and the associated information.

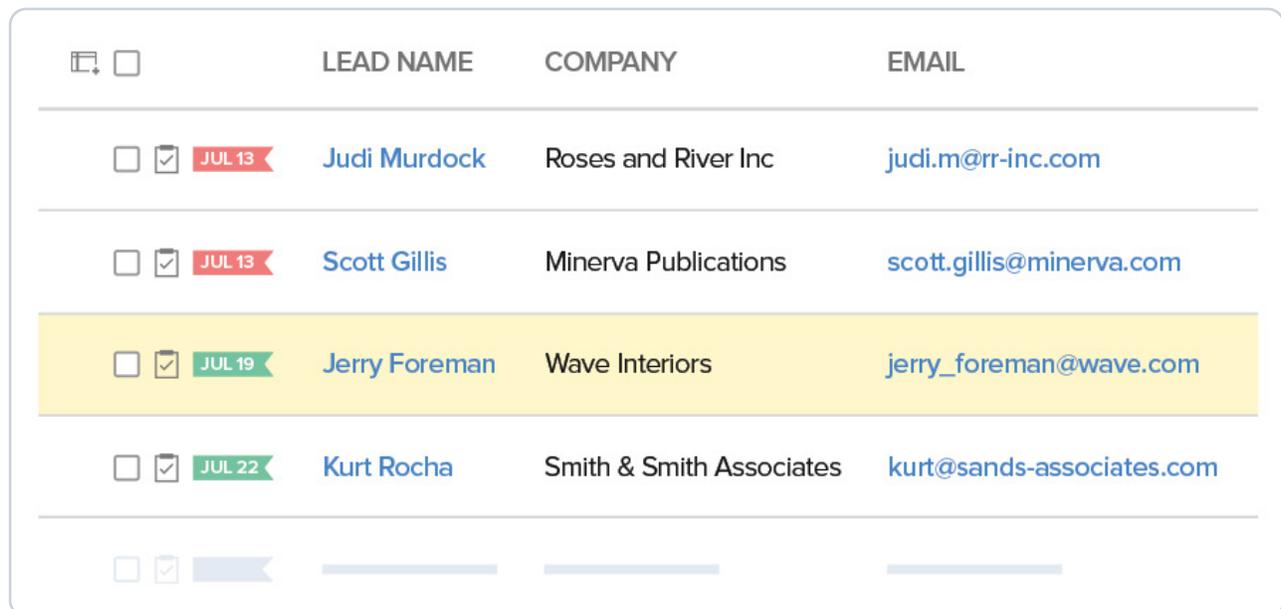**A subform to associate dependent details with an applicant.**

A life insurance form may ask an applicant to fill in dependent details. This section will be a subform requesting details such as Dependent Name, Age, and other identity-related information. While the primary form is still about the insurance policy holder, the subform is a table with details about their dependents.

A better view of your CRM operations: List view and canvas

Module views in CRM help you sort, categorize, and view only the records that you need. You can also choose between three different ways of viewing your CRM data:

List view

A list view in CRM can be used to group records based on certain criteria, so you can see specific, relevant customer data.

For example, you may be interested in following up on the leads created during the last week or reviewing pending tasks, or you may want to filter out big deals. The best way to handle these scenarios is to filter the records using list views.

There are two ways you can use list views:

1. Standard list views

2. Custom list views

Standard list view:

CRM provides a set of standard, public list views that can be used by all the users in your organization and cannot be deleted. Some of the public views include:

- **Today's leads:** Leads that were added to your CRM on the current day

- **Converted leads:** Leads that were recently converted to customers

- **My leads:** Leads assigned to you

- **My converted leads:** Leads that you converted to customers

- **Junk leads:** Leads who are not going to buy your products

Custom list views

Custom list views are views that you create by specifying criteria for which records to display.

For example, you're a sales rep and you have a set of leads from a trade show in a particular city. You can create a custom list by specifying the criteria as shown.

When you create this custom view, you can either choose to share it with everyone in your sales teams or select the users who you want to have access to it.

Kanban view

The Kanban view is a card-based view that displays the data in an organized manner for better comprehension.

ATTEMPTED TO CONTACT	CONTACT IN FUTURE	CONTACTED
$ 2,355,000.00	**$ 670,000.00**	**$ 1,020,000.00**
Craghead	Carissa Meyer	Sweely
Storage Equipment	Data/Telecom OEM	Storage Equipment
$ 850,000.00	$ 200,000.00	$ 190,000.00
Dec 28, 2019	Jan 9, 2020	Jan 2, 2020
Hirpara	Keyleigh Lace	Haroldson
Non Management ISV	Email Opt Out	Service Provider
$ 180,000.00	Optical Networking	$ 830,000.00
Dec 11, 2019	$ 270,000.00	Jan 11, 2020
	Jan 27, 2020	

For example, you can segregate leads based on their contacted status and display the deal revenue under each status, which are crucial factors for your sales reps to be aware of, so they can avoid potential bottlenecks.

Canvas view

Canvas view in CRM helps you go a step further and create an entirely personalized view of your records. You can:

You can,

- Add images
- Rearrange or group fields
- Insert a background color for the field text box
- Use a different font style for text entries
- Choose to highlight specific details of your modules

If your business is a real estate company, your customers will definitely want to know what the property that they are thinking of purchasing looks like. In canvas view, you can:

- Display property images

- Add a specific background color to a property area

- Highlight the location of each property in red

- Group similar fields like phone number, email address, and residential address for a consolidated view

Involving customers, partners, and vendors in your CRM via Portals

When your business expands, it is important to extend the scope for your customers, partners and vendors to integrate with your business so that you can interact directly with them and capture their valuable feedback.

Portals in CRM are designed to help you achieve this interaction. Creating a portal allows you to give your customers, partners, and vendors access to part of your CRM, so they can access some of the modules and data such as products, invoices, and notes.

They can also view, edit, or create records or add notes and attachments. For example, let's say your business works in the automobile industry. You run an automobile workshop and you want to track your customers' details, the vehicles you have sold them, and their servicing schedules.

When you share this portal with your vendors, they can:

- Add specific requirement notes, e.g. on spare parts logistics.
- Add price quotes for the supplied spare parts

Your customers can

- View and edit their details in the portal
- Add notes on quotes requesting negotiation
- Sign up for their next vehicle service

The customer details added in the portal will also be added to your CRM.

5. Increase the productivity of your sales teams

When we look at activities that sales reps are expected to perform on a daily basis, which includes day-to-day follow-ups, assigning sales reps to leads and customers, leaving voicemails, sending emails and so on.

Zoho CRM Plus helps your sales teams from spending time on repetitive tasks that they perform manually on a daily basis and allow them to do what they are best at, which is TO SELL.

Have the right reps work on the right leads with assignment rules

If your business generates leads from multiple sources, it is important that you have the right rep assigned to the right lead. Assignment rules in CRM help you with this in two ways:

Assigning leads to sales reps based on specific conditions

Leads from USA / India			
@ Leads			

Rule Entry			Reorder	+ New Rule Entry
S.No.	Criteria	Assign To		Associated Task
1	(1) Country IS USA	Users - Rivers Quinn		
2	(1) Country IS India	Users - Rao Raghav		

If your business relies on a particular lead source to generate leads, for example, trade shows or your website, you may want to have all the leads from that source assigned to a particular sales rep. Or, if your business has recently expanded to a new country or region like the United States or the Middle East, you may want to have the sales reps for that region handle all their local sales. Assignment rules based on criteria can help in either of these scenarios.

Assigning leads to sales reps in a round-robin pattern

	LEAD NAME	LEAD OWNER	LEAD NUMBER
☐	Aarthik Reas	Pooja Raman	6
☐	Jasmine Frank	Patricia Boyle	5
☐	George Smith	Jeff Stevens	4
☐	Ronith Roy	Tai Chang	3
☐	Egon Spengler	Amelia Burrows	2
☐	Ray Stanz	Pooja Raman	1

If your business does not have a particular condition for assigning leads to your sales reps, but you want to make sure that every sales rep in your team is assigned with an equal number of leads, then you can use round-robin assignment.

Route your website chats to the right person

When visitors land on your website, it is important for you to be there for them to listen to them and get a clear understanding of their requirements and have the chat routed to the appropriate teams so they can provide resolutions quickly.

Name your routing rule: Route to sales operator

Select a website: zylker-furniture

Choose a condition based on which you would like to filter out your incoming chats

Number of Past Chats | is more than | 1

On what basis would you wite the filtered out chats to the operators?

Route one by one

Do not route **1**
✓ Route one by one **2**
Route to least loaded **3**
Route to selected operators **4**
Route to the first available operator **5**

To achieve this, SalesIQ in Zoho CRM Plus is equipped with chat routing, which allows you to route every visitor chat to the right team by specifying a set of predefined conditions.

Some of the conditions could include:

- **City:** City where the visitor is accessing the website from

- **Country:** Country visitor is accessing the website from

- **Number of visits:** Number of times the visitor has visited the website

- **Visitor type:** New or Returning

- **CRM contact:** CRM information for the website visitor

- **Visitor stage in CRM:** The stage of the website visitor in CRM:
  Contact, Lead, Prospect, Not available, or Yet to be approved

For example, let's say you have a new visitor to the pricing page of your website. This visitor's chat can be routed to the pre-sales teams, who can engage by discussing buying options and negotiating the price.

If you have an existing customer visit your website, you can have this particular chat routed to your customer success team, who can offer product suggestions based on the customer's previous interests.

Sales follow-ups

Now that you have assigned your business leads to your sales reps, it is to be followed by a series of nurturing activities such as welcoming your business leads, following-up with them on a daily basis and so on.

Automate your sales activities with Workflow Rules

Zoho CRM Plus helps you automate your sales activities such as sending emails, assigning tasks, and updating fields with workflow rules in CRM.

Now that you have set assignment rules for your business, your lead will automatically be assigned to one of your sales reps when they enter your CRM. Your sales rep will now need to perform actions related to this new lead. This could start from welcoming the lead to your brand with an email, assigning a follow-up call task to one of your sales reps, and updating information in the record fields.
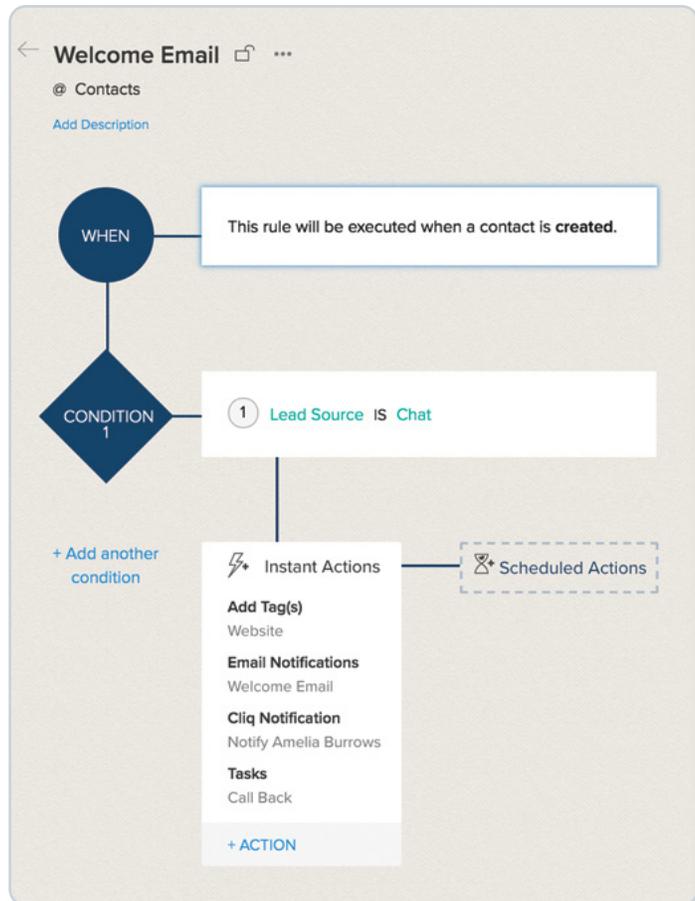
Workflow rules work on IFTTT (if this then that) conditions when an action is triggered. For example, let's say you want to send a welcome email to a new lead in your CRM. Conditions for implementing this workflow rule will be:

if (a new lead is added) then (send a welcome email).

Here are some other ways that you can use workflows in CRM for your business:

Some common use cases can be:

- if (it's your lead or customer's birthday) then (send them a birthday message)

- if (there is a big deal alert) then (have the lead assigned to one of your expert sales reps)

Automate sending a follow-up email, updating the status field, and creating a follow-up task with Macros

Your sales reps will have a set of actions that they perform on a daily basis on some of your CRM records. Since these actions are repetitive, you may not want your sales reps to spend too much time carrying out these actions manually on every single record in your CRM.

Instead, your CRM can make it easier for your sales reps by letting them create macros for three actions that that they perform frequently.

For example, you are a field sales executive and you are regularly assigned new leads. Your job is to meet the leads and try to sell them your product.

After contacting them, you perform the following actions:

- Send a follow-up email.

- Update the Status field to "1st Follow-up Initiated".

- Create a task for the other members of your sales team to follow up with the lead.

CCRM helps you combine all these actions in a single macro which you can run on a selected list of leads at once, instead of manually visiting each record and updating the record fields.

Did you know?

Zia, our AI-driven sales assistant can actually help you save time by suggesting macros based on your CRM activities

6. Streamline your sales processes with blueprint in CRM

Every business has its own set of sales processes to implement on every lead, from when they enter the CRM through deal closure and beyond. Several teams are involved in completing the process and it is important to keep track of the protocols being followed for each process.

For example, let's say your business has a separate process for following up with big deals.

- Multiple stages are involved in this process such as lead qualification, negotiation, value proposition, and finally the legal review.

- People from different teams are involved in carrying out each stage.

- Crucial information can be collected at each stage of the process

How can you ensure that all of this happens correctly? How can you ensure that everyone who is involved the process follows every step? Blueprint can help you build, automate, and streamline your business processes while also ensuring everyone follows the right protocols.

Let's look at an example of the lead nurturing process.

Here's the process that you expect your sales teams to follow:

Your sales establish contact with new leads entering your CRM. Leads can only be updated to the "Contacted" status in the following situations:

- If the sales rep is able to reach the lead, they can change the status to "Contacted".

- If the rep is not able to reach the lead, they can only change the status to "Attempted to Contact" after they have documented the call attempt.

Now that you have set conditions for completing your lead nurturing process, you can prevent your sales reps from bypassing stages before they update the lead status.

This blueprint will help you gather all the necessary information as the lead moves through each transition so that the sales manager can monitor the sales reps' work.

7. Nuture your prospects and customers with effective email marketing via Campaigns

When it comes to communicating with your customers, most businesses rely heavily on emails. Campaigns can help you with all of your email marketing efforts and allow you to understand how they impact your sales revenue.

Here's what Campaigns helps with:

- Draft and send the right message to your prospects

- Send beautiful product newsletters to your customers

- Invite customers or prospects to events

- Associate multiple email follow-ups and more

- Send SMS messages to your customers

- Set up and launch social campaigns across different channels

With Campaigns, you can plan your marketing in four ways:

Send effective email campaigns

Campaigns allows you to create simple email campaigns as either text-only emails or emails with HTML content if you want to create visually appealing emails with images and add call-to-actions.

Here's a checklist for creating a simple email campaign:

- A clear subject line

- Sender details, which can either be your own email address or an alias email address

- List of recipients

- Your email content, which can either be in plain text or
  HTML code to add images and formatted text

Here are some examples of how you can use simple email campaigns:

- Product newsletters
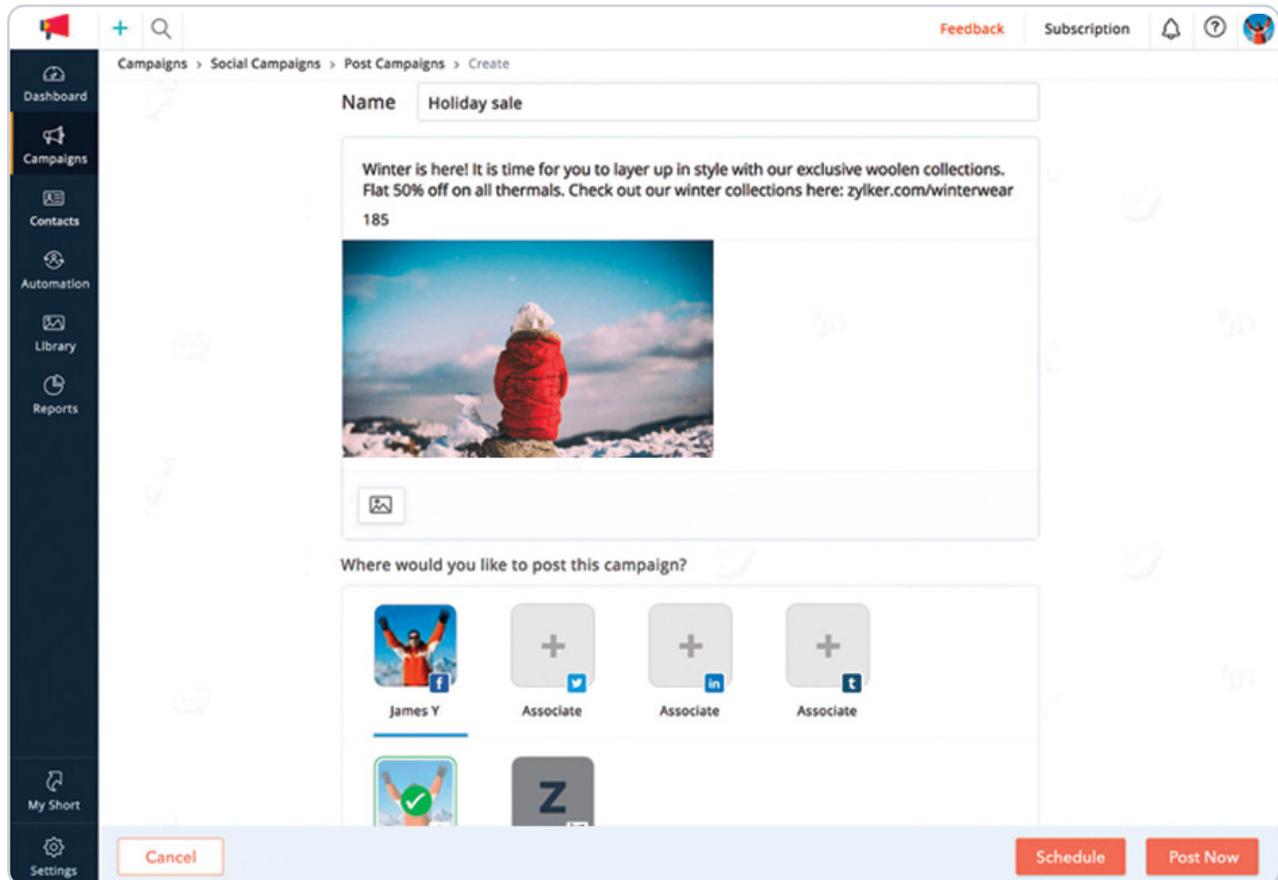
- Webinar invites

SMS campaigns

Although modern businesses have adapted to the digital era to execute their business operations, SMS messages are still an effective, cost-effective communication channel that make it easy to reach your customers.

With SMS campaigns, you can now reach your customers at any time with messages that carry precise information about your business. You can reach out to all of your customers at once by sending bulk SMS messages.

All you need to get started is have your Zoho CRM Plus account integrated with an SMS gateway like Twilio, Clickatell, MessageMedia, MessageBird, SMS-Magic, MiSMS, MSG91, or BurstSMS.

Social campaigns

When it comes to marketing your business on social media, the possibilities to reach a wide audience and engage with your followers via social campaigns are almost endless.

With social campaigns you can:

- Create Facebook landing pages to engage not only your existing audience but also new visitors to your Facebook page

- Share your email campaigns on your social media channels such as Facebook, Twitter, and LinkedIn to reach a wider audience

- Plan and launch social media campaigns by specifying the campaign's start and end dates and automate routine posts

- Invite subscribers to 'Like' your Facebook page by sending your Facebook page as an email campaign

- Measure the performance of your social campaigns and see how many likes, retweets, comments, and views you get

Advanced email campaigns: A/B Testing

Your marketing teams send email campaigns with the intent of maximizing your open, click, and response rates while generating as many leads and sales as possible for each email campaign. However, with increasingly over-loaded email inboxes, chances are high that your prospects won't actually open your emails.
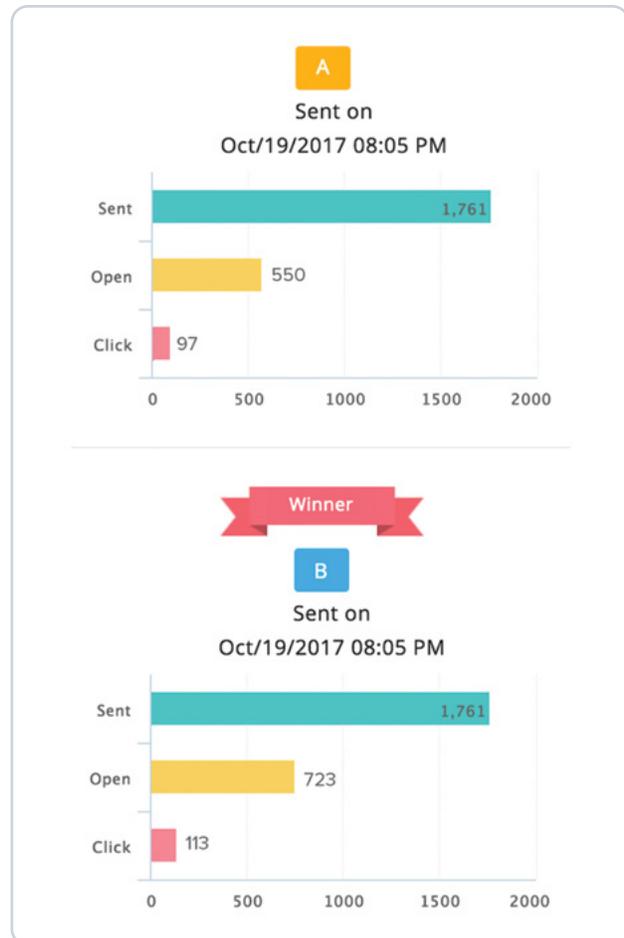
Which is why it is important to implement trial and error tests for different versions of your email campaigns to help pick the best version that can make the biggest difference to your bottom line.

A/B testing (also known as split testing) is a tool in Campaigns to help you compare two different versions of an email campaign.

Let's look at the following example to understand better how this works.

Zylker, a fashion ecommerce business, wants to plan an email campaign for their Thanksgiving sale. Usually, Zylker's marketing teams will create an email campaign, send it, and wait for their recipients to respond to the email so they can measure the campaign email. However, it isn't necessarily that simple in real life.

How can Zylker be sure that their email campaigns have effectively reached their audience if they can't identify which aspect of their email was engaged with the most? What if a different campaign would have generated better leads for their Thanksgiving sale? To get answers to these questions, Zylker decides to run an A/B test on two different versions of their email campaigns with differences in the:

- Email content

- Subject line

- Sender details

The two email versions are then assigned equal traffic to see which version performs better in terms of open and click rates. Once the test period is over, Zylker can see which version had more opens and clicks. The winning version can then be sent to the rest of the recipients after further iterative experimentation to improve results.

If the results of both the email campaigns as equally effective, the marketer can pick which version to send to the audience.

Did you know?

On receiving neutral results from both the email campaigns, the marketer can manually pick the desired version and have it sent to the audience.

Email marketing automation with autoresponders and workflows:

When your business starts growing to a larger audience, it is not practical to invest the time and resources to keep track of when your customers' birthdays are, or which customers you have are new customers. By implementing automated email marketing into your communication strategy, you know exactly what to send when and to whom.

Today, customers want marketing emails to be unique and tailored to their needs, and not just stick to common, repetitive content. With email marketing automation in Campaigns, you can send timely, relevant, and personalized emails to individual contacts when they take a specific action.

Campaigns helps you achieve this goal with:

- Auto-responders

- Workflows

Auto-responders

Autoresponders are tools designed to help you automate a series of follow-up email messages based on contact activity.

Campaigns supports the following types of autoresponders:

- Signup autoresponder

- Date-field autoresponder

- Closed group autoresponder

- Email action autoresponder

- Calendar autoresponder

- Cyclic autoresponder

- Smart series

Let's look at some examples of how these autoresponders can be implemented:

Signup autoresponder:

The signup-based autoresponder is triggered when a contact enters or signs up to the mailing list associated with it. You can schedule the messages based on the contact signup.

Here are some scenarios where signup autoresponders can be used:

- Nurturing new leads with series of emails

- Introducing new customers to your company and sending brochures

- Sending an online email tutorial

- Promoting a product or website

- Sending a confirmation email after a purchase

Here's an example of the signup autoresponder:

Nicole owns an online fashion boutique. She has embedded a signup form on her website. She needs to send her contacts a welcome email as soon as they sign up, introduce her new arrivals, and follow up with offer updates. To achieve this, she sets up a signup autoresponder and schedules the first welcome message as 'Immediately after signup'. She then schedules the next message as 'Two days from joining the mailing list' and so on. This helps her encourage customers to keep coming back to her website and making regular purchases.

Cyclic autoresponder

Cyclic autoresponders come in handy when you want to send messages at periodic intervals, where your follow-up emails will be sent on a daily, weekly, monthly, or yearly basis.

For example, you own a restaurant. Your Wednesday nights are usually a bit slow.
To increase business, you set up a cyclic autoresponder set to recur every Wednesday and send your customers special offers.

Email workflows:

From welcoming your contacts to engaging with them throughout their journey, creating a good brand impression is only possible with the right plan. Email workflows from Campaigns are a series of automated emails that are triggered based on subscriber behavior or data.

They are often used when marketers want to create a series of automated emails that work together to accomplish a goal, such as onboarding new customers or nurturing new leads.

Campaigns supports the following types of workflows that you can implement for your email marketing automation:

Conditional workflows

Instant workflows: Trigger a workflow whenever a defined condition is met.

Time-based workflows: Trigger a workflow at a time you specify, either once or recurring.

Activity-based workflows: Trigger a workflow based on contact activity.

Custom workflows

In addition to setting up workflows based on conditions, Campaigns also allows you to create custom workflows to suit your various business needs. Custom workflows are an important automation tool that allow you to create processes unique to your product and define the various paths your contacts can take in a workflow. Define a trigger, configure the processes that follow the trigger, and select the end-of-workflow actions.

Pre-defined workflow templates

Campaigns is also equipped with a range of predefined email workflow templates which marketers can pick from to make their work easier.

You can pick templates from a variety of categories:

- Welcome and onboarding

- Lead nurture series

- Re-engagement

- Customer retention

- Ecommerce

Marketers can now easily build their marketing strategy, which not only reduces the time and effort spent on manually creating workflows, but also allows you to focus more on your customers with well-timed and personalized targeted emails.

Here's a detailed use case for implementing the ecommerce workflow template for your business.

Ecommerce is one of the many new email workflow template options that Campaigns supports, equipped with workflows designed for ecommerce-related email marketing campaigns.

With the ecommerce template, you can now connect to your online store (using Zoho Commerce or Shopify) with Campaigns and create workflows for simple or complex ecommerce-related email marketing.

Ecommerce supports the following email workflows:

Simple abandonment: An email series of activity-based reminder messages to your customers to help them complete their purchase on your website.

Advanced abandonment: An email series of activity-based reminder messages to their customers to help them complete their purchase on your website.

Purchase follow-up: Personalized follow-up emails to customers a few days after their purchase.

Let's say we have a business named Zylker Fashions which sells online apparel.

Zylker Fashions is planning a holiday email marketing campaign series. They want to target different customers with different emails based on the products they've purchased in order to maximize their year-end holiday sale.

a) Zylker discovers that visitors to their online store are frequently adding items to their shopping carts, but leaving before checking out.

A customer leaving your website with an abandoned cart tells you that you're close to winning that deal. Abandoned carts are a perfect use case for the ecommerce workflow template to help Zylker turn them into profitable sales.

Zylker's marketing teams decide to trigger a simple abandonment email series workflow that offers perks like free delivery and discount codes to customers who haven't completed checkout.

b) Zylker's marketing team now wants to target customers who have purchased Halloween products and initiate a follow-up email workflow.

Customers making a purchase in a specific product category (in this case, Halloween products), can trigger a workflow to send a targeted follow-up email..

With the new drag-and-drop workflows, the Zylker marketing teams can also set up a trigger for a reminder email series to send to contacts who haven't opened the first email.

c) Zylker's marketing teams also want to set up a re-engagement series workflow for rekindling the interest of unresponsive contacts.

In addition to the pre-made email workflow templates, you can also create custom templates catering to your business needs.

Here's a checklist to create custom email workflow templates in Campaigns

1. Define a trigger to pull your contacts into the flow

2. Merge different process components and define a series of actions

3. Conclude the path using end-of-workflow elements

8. Improve your social media presence

Zoho CRM Plus gives you Social, a complete social media management platform for businesses to manage multiple social channels like **Facebook, Twitter, Instagram, LinkedIn,** and **Google My Business.**

It allows your marketing teams to,

- Grow your presence on social media

- Schedule unlimited social media posts at the right time

- Monitor everything that is being discussed about your business or industry

- Use rich pre-built reports to track everything about your audience, posts, brand engagement, reach, impressions, and other crucial brand metrics such as likes, tweets, @mentions, comments, follows, replies, and posts

Some of the features offered by Social to help set the stage for your business's social media presence are explained in the following section.

Social monitor

The social monitor is exclusively designed to help you stay on top of conversations about your product or your industry so you can seize the opportunity and pitch for a sale just at the right time.
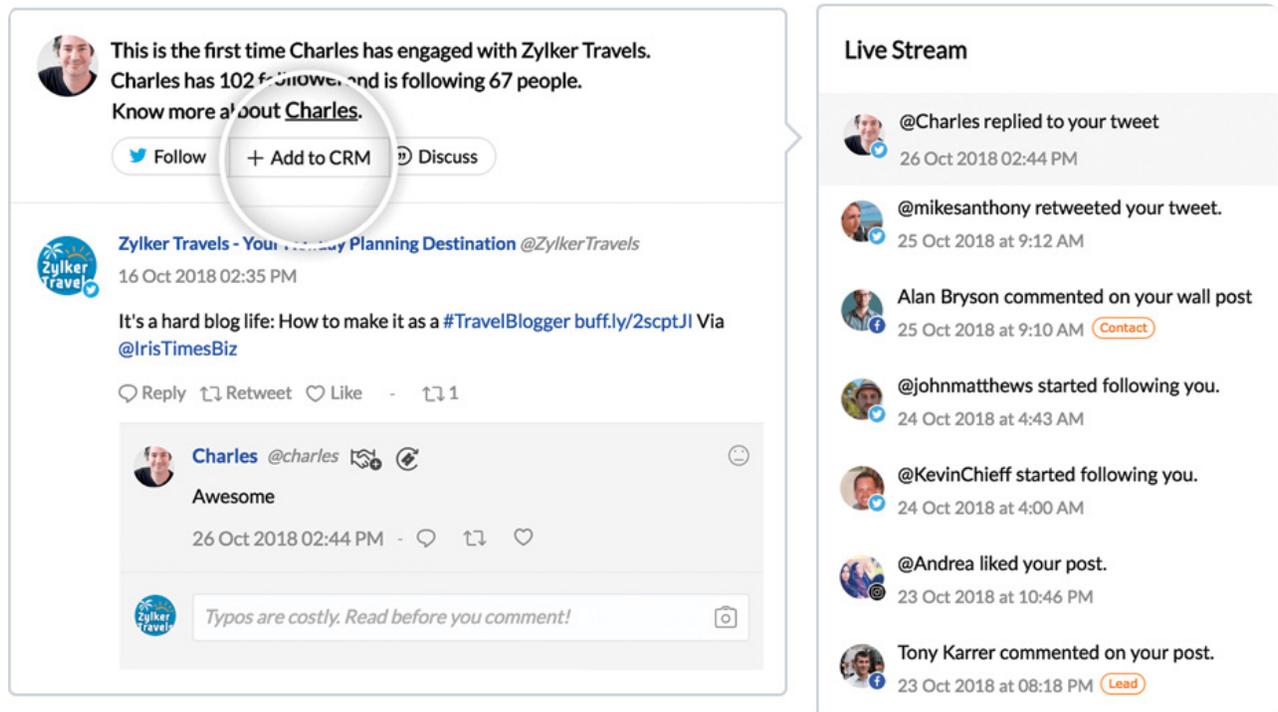
Let's say you work for Zylker Furnishings, which sells furniture. In your social monitor, you could configure keywords that are specific to your business, such as your brand's name, "Zylker Furnishings", or keywords that are relevant to the area of business you cater to, for example, "Office furniture". This helps you stay on top of every enquiry, complaint, or discussion.

On the Monitor tab, you can create multiple columns, each specific to a single keyword, to follow and keep track of your page follows, @mentions, and hashtags that are relevant to your business..

Live Stream

With Live Stream in Social, you can now follow a stream of social activities to learn how your audience is interacting with your brand at a glance. You will be able to see activity updates on likes, mentions, follows, replies, and posts to learn how people are interacting with your brands.

Your marketing teams can use these insights into social activities and previous conversations with customers to help you get a complete overview of customers, which will add more value to future conversations.

Connections and collaboration

Let's say your business sells consumer electronics and you have a follower named Amelia on Twitter. Because she chose to follow your business on Twitter, Amelia is now added as a connection to the Connections tab where you can see connections for every social media network you have connected, such as Facebook, Twitter, Instagram, etc.

Clicking on a connection will display:

- The connection's conversations with your brand on any social network

- CRM information with details on deals proposed to this connection

- Desk information if they have reached out to your support
  teams to raise an issue with your product

Other internal actions you can perform include Follow, which lets you follow a connection and Discuss, where you can collaborate and plan the actions to be taken for a particular connection with their team members. This can be found on the Collaboration tab.

Manage direct messages with social inbox

Timely responses to messages can be key in building a good relationship with your customers. People usually message a business privately when they have questions or complaints or when they want to partner with that business.

The Messages tab in Social displays your incoming Facebook and Twitter messages in one space, so you'll never miss anything that comes into your social inboxes. When you click on a message, you'll see all the details about the person interacting with you and any history of interactions with them. You can also save personal info, like email addresses, phone numbers, or anything the users share with you here.

You can also filter out messages that come from your leads and contacts in CRM, or choose to view all the messages in the same place.

Did you know?

Unhappy tweets on your Twitter page can be converted directly into support tickets in Desk to gain quicker attention and action from your support teams.

9. Staying notified in real-time about customer interactions with SalesSignals

When it comes to communicating with your businesses, customers reach out to you via multiple touchpoints such as email, telephone, live chat, and social media networks. From filling out customer surveys, to reporting an issue to your support teams, your customers will communicate with a range of people in your organization. Staying informed about all customer interactions across the channels can quickly become challenging.

SalesSignals helps you with real-time notifications from your leads, contacts, or potential customers, allowing you to keep track of all your customer interactions across various channels and follow up on them from one central space. This can help you provide timely responses to your customers while also allowing you to follow up on important leads and contacts and close deals faster.

For example, let's say your business is in the travel industry

- You plan an email campaign suggesting the top five tourist spots to visit in a particular city.

- You have also promoted this campaign on your Facebook and Twitter pages.

- You want to know how many of your customers are likely to plan trips using these

Notifications

David Villa5 mentioned you in a tweet
13 Jan 2020 03:11 AM

@KeysWedding mentioned you in a tweet
10 Jan 2020 08:02 PM

@puruslee2 mentioned you in a tweet
10 Jan 2020 12:39 PM

David Villa5 retweeted your tweet
10 Jan 2020 12:39 PM

Jamesmaddison@jm202 commented on your post
7 Jan 2020 12:35 PM

@vpulibrary mentioned you in a tweet
5 Jan 2020 03:11 AM

Andrew Lacazette@al30 commented on your post
3 Jan 2020 06:39 PM

@kenloh mentioned you in a tweet
2 Jan 2020 11:33 PM

Here's how SalesSignals can help you stay updated on every response action from your customers:

- Facebook post likes

- Email opens, clicks, and opens

- Your @mentions on Twitter

- Survey responses

- Missed chats on SalesIQ

- Ticket notifications from Desk such as new tickets, ticket escalations, overdue tickets, and ticket comments

Providing long term support and focussing on customer retention

As a business, when you work towards providing exceptional customer support, you may want to consider the following two questions:

1. Are your customers being asked to repeat their contact information every time they reach out to your support teams?

2. Are they being given timely and context-aware responses?

Answers to these two questions are essential for keeping your customers happy about the service offered by your business, which ultimately affects long-term retention.

Let's try to understand why it's so normal for customer service to make customers repeat their contact information on every support call. Let's say your business works in the automobile industry, offering car services. One of your customers, Heather, signed up for car servicing last week, and was then unhappy with the service. Heather calls to report this but then gets a call the following week from another sales rep, who wants her to sign up for a car service this month. A frustrated Heather decides to switch away from your business.

So what's the problem here? The information documented by your support and sales teams was siloed, so the sales rep was not aware of what had happened with Heather's previous call.

What we mean by providing exceptional customer support:

When it comes to providing great customer support, the ideal scenario is that when a customer calls you, your support reps are able to see a complete history of the customer's transactions with your business, providing them with information sales, support, and marketing which will help them engage better with the customer.

Desk in Zoho CRM Plus helps you place your customers at the heart of your business, giving you the ability to collectively manage your customer support operations such as assigning tickets to support reps, tracking customer responses, and setting up alerts on priority tickets..

Omni-channel customer support:

Your support reps are expected to work on solving questions and support requests they receive from a customer. It can be quite chaotic to have tickets pile up from multiple customers and from various channels.

These channels include,

- Emails

- Phone calls

- Product community

- ASAP

- Webforms

- Help center

- Live chat in SalesIQ: convert unhappy live chat customer conversations into Desk tickets

- Social media: convert unhappy tweets, posts, or comments into Desk tickets

- Survey: convert negative feedback into Desk tickets

Desk in Zoho CRM Plus provides an inclusive ticket interface for your sales reps by collecting all support tickets from different channels and organizing them in one tab, allowing them to reply to all tickets from the same tab.

Automate your daily support activities and close tickets faster.

Route your support tickets automatically with assignment rules

Similar to assignment rules in CRM, Desk also allows you to set assignment rules helping you route tickets based on the associated department.

For example, you work for a real-estate firm. As a support manager, you want calls related to commercial property be handled by a support rep named John, and calls related to residential property be handled by a support rep named Mark.

You can set an assignment rule that handles this requirement by clicking Add Target and then specifying the required criteria.

Setting up this assignment rule will automatically route calls to the assigned personnel and avoid call re-directs.

Automate end-to-end support processes with blueprint

Similar to blueprints in CRM, Zoho CRM Plus Blueprint lets you build and automate processes that run across your sales, marketing, and support teams.

Let's look at how Blueprint can connect your sales and support processes seamlessly and ensure everyone follows the right process. Take your daily sales orders, for example:

You can set up a blueprint for your sales orders in your CRM with the following stages:

- Start

- Qualification

- Negotiation

- Closed won

- Order request sent

- Delivery done

This means that every new sales order in CRM will follow the exact same process with corresponding transitions and you can specify who will be in charge of which step of the process. You can also specify what inputs a particular sales rep needs to make in the CRM for each stage, and set specific validations for fields, for example, discount percentage.

And you can also create a blueprint for your sales orders in Desk with the following stages:

- Open

- Order confirmed

- Inventory confirmed

- Pickup scheduled

- Exchange completed

Now, every new order request for your support team will follow the exact same process. And, like in CRM, you can specify which support agent will be responsible for which stage of the process and specify any mandatory fields like notes for stages where they are important, for example for the "Pickup scheduled" stage, you could make it mandatory for your support agent to add notes, without which the order will not be able to move to the next stage.

Blueprint in Zoho CRM Plus can also seamlessly connect your sales and support processes and trigger actions in both teams. In this example for sales orders, approving a sales order in CRM will move the request to the "Order request sent" stage and automatically create a ticket in Desk. When the sales order is marked as "Delivered' in CRM, the delivery is marked as completed in Desk and the stage is automatically updated to "Delivered".

This keeps all your teams on the same page, which allows them to communicate clear and timely information to your customers.

Deliver quality customer support by setting SLAs and defining their validity period with contracts

When it comes to planning your support operations, it's important for your business to agree on a certain standard of service that you'd like to deliver to different categories of customers, which is known as a service level agreement or SLA.

A service agreement represents the response times and the resolution times offered by your agents. For example, you may want to set a 3-hour SLA for customers who signed for premium support and a 10-hour SLA for customers on standard support.

Typically, an SLA will contain the execution criteria and a set of predefined conditions or targets. While the execution criteria define when an SLA should be triggered, the target will include the actions that will be performed on the trigger. You can configure actions like response time, resolution time, escalating, reassigning tickets, and updating priority.

Desk allows you to follow two models of service level agreement:

- Create SLAs for individual accounts in your Desk
- Create a SLAs (like Standard Support and Priority Support)
  and use them for multiple accounts

Note

Service level agreements are only applicable to the Tickets module.

Managing contracts

Your support teams are likely to maintain an agreed level of support with your customers. This is defined by the service level agreements that are in place. These SLA policies between you and your customers can be enforced by creating contracts in your help desk.

For example, a customer who opted for premium support during the first year of their contract now wants to switch to standard support. Desk allows you to create a contract with a customizable date for the commencement and expiry of this SLA, along with alerts that will keep you notified when it expires.

Note

You can also have multiple contracts associated with a single account, provided they don't have overlapping time periods for the same SLA.

Cross-module and context-aware collaboration with team feed

Problems solved by one of your teams may not just be confined to the scope of that particular team. It may sometimes be necessary to involve other teams to get a fuller picture of what is going on with a customer. To provide exceptional customer experience, your sales, marketing, and support teams will need to collaborate effectively and easily.

With Zoho CRM Plus, you can

- Send direct messages to your colleagues

- @mention the right team or person on your tickets and notes

- Tag a ticket (#ticketID) or an agent (@name) in your status messages

- Close and re-open activities and tickets

- Receive real-time notifications whenever someone adds you to a conversation or mentions you on a ticket response

- Receive instant mobile notifications of actions related to you

- Receive notifications for changes made to any record in Zoho CRM Plus

- Receive notifications when you follow or unfollow a record in CRM

- Interact with customers directly via client portals and vice versa

- Share reports and dashboards with your team and collaborate on them

- Invite your survey reviewer to check if your survey is ready to be sent

How this relates to your support teams

The Team Feeds feature in Desk provides a platform where you can share your views and discuss matters with coworkers to speed up the customer support process. Feeds will also provide updates about important customers and tickets that you follow.

For example, your support teams get a ticket in Desk that calls for a major sales deal, meaning this ticket needs the attention of an expert sales rep with a high conversion rate. All you need to do is tag the ticket with the sales rep's name (@name) in your status messages..

Did you know?

With Zoho CRM Plus, your salesperson can change ticket priority from within CRM, so if you have a ticket from a high-value customer and your sales person sees it, they can change the ticket priority to high and also tag the relevant support agent.

Create online surveys and questionnaires using Survey

The most important thing in the customer lifecycle is to listen to customer feedback. It's important to know how well your business has performed compared to customer expectations and learn what customers liked about the experience and what they want you to improve.

Surveys in Zoho CRM Plus are designed to effectively gather this feedback. You can easily create targeted and effective surveys for:

- Data collection

- Customer feedback

- Business research

- NPS

- Customer retention

- Upselling opportunities

Let's look at the various components associated with your Surveys.

Seamless and easy survey creation

The survey builder is an easy-to-use drag-and-drop survey tool with multiple pre-made survey categories like event surveys, customer satisfaction surveys, and marketing surveys to meet your business's requirements. Each template contains relevant questions that you can pick from and add to your survey form.

The survey builder also comes with twenty-five different question types including checkbox, image fields, star rating, slider scale, ranking, and NPS among others, which you can choose from. You can either create custom surveys using these question fields or use our pre-made survey templates. You can also make your surveys more visually appealing by choosing from a range of colors and themes in the survey builder. Survey also lets you save your own customized themes with your organization branding and logos.

In addition to creating surveys, the survey builder also comes with advanced options

Scoring:

To learn more about your audience and their thoughts with scored responses.

Translate:

Translate your survey into 70 languages.

Invite reviewer:

 Invite a reviewer to review and leave comments on your survey.

Transfer survey:

Transfer the reports from the survey to your marketing teams.

Share survey:

Improve the quality of your surveys by sharing it with different skilled teams such as designers to create your survey theme and writers to edit your survey content.

Share survey report:

Create custom reports that can be distributed among your teams and limit their access using roles, to keep crucial information secure while still giving them the information they need.

Custom variables:

By adding custom variables in your surveys, you can include known information about your respondents, without having to ask them for it.

Buying responses:

To help you decide your target audience, you can use this option to buy responses from your desired demographics and then choose the number of responses. Based on the estimate, you can now buy the audience to take your survey.

Define trigger actions based on survey responses

In addition to sending out surveys to your customers, you can also set triggers while creating your survey with the survey builder.

Triggers are actions or workflows that you can set for your surveys, which will help you specify the plan of actions while sending the survey to your customers. Surveys currently supports three triggers: trigger emails, trigger functions, and webhooks.

Trigger emails:

Send an email automatically when a response is submitted.

For example, as part of acknowledging your customers who took the time out to fill your survey, you might want to send them a thank you email. You could do this by specifying the "Thank you" email as a trigger action that will be sent to your customers right after they fill out the survey.

You could also choose to respond to your customer surveys only when respond in a certain way, for example, when they give negative feedback.

> **Did you know?**
>
> You can connect your surveys to your sales and support teams. You can mark people who have responded with positive replies as leads in your CRM and negative responses as tickets to your Desk via trigger functions, where you can set up scripts that run when a response is submitted.

Get a comprehensive picture of your business with analytics

Every business wants to know what's working and what's not working for them, so they can measure and improve along the way. Zoho CRM Plus comes with in-depth analytics for your sales, marketing, and support functions along with the ability to get reports that combine all three functions.

Sales analytics

Dashboards in CRM help you drill down to the smallest aspects of all your sales functions. The powerful dashboard components help you measure different aspects of your CRM.

Comparator:

Identify star performers or the highest performing growth regions for your business

Compare different users, time periods, and module fields.

Anomaly detector:

Prepare your team for future anomalies and understand where you went wrong

Helps you analyze sales and post sales metrics, compare your actual and expected growth, and detect deviations in your performance

KPIs:

Find direct answers to your questions

Lets you measure the performance of your team and provides useful analytics to help sales personnel increase their productivity by measuring their performance on a regular basis.

Target meter:

Motivate your team

Lets you set and monitor targets for your team. Just choose a target meter and define relevant parameters to see the number of leads generated in the current year or annual revenue for the last quarter.

Funnels:

Understand where your data drops off in the sales pipeline.

Charts:

Get a quick visualization of your performance.

Zoho CRM Plus helps you quickly create charts without reports. Some of the chart types you can create are: bar, line, funnel, table, column, donut, pie, area map, and heat maps

Marketing analytics

Zoho CRM Plus also gives you insights on your social media activities with metrics like audience growth, post engagement and performance, reach, and impressions.

Support analytics

View your overall customer happiness rating, see the longest support threads, as well as unassigned tickets.

Unified business analytics

In addition to viewing to specific dashboards to sales, support and marketing, Zoho CRM Plus also helps you blend data across applications such as CRM, Desk and Social and present crucial data in any one the 300+ pre-built templates that can be customized to highlight key performance metrics.

Conclusion

We want to help businesses provide exceptional customer experiences to their customers without introducing a complex or hard-to-navigate user experience. That is why Zoho CRM Plus comes with a user experience that has a unified interface, unified search, unified user panel, and unified setup.

Glossary

Zoho CRM Plus	
Admin Panel	The Admin Panel in Zoho CRM Plus is a centralized user management console where you can manage your organization and user account settings and your subscriptions.
CRM Plus Administrator	The CRM Plus administrator user who has administrative privileges in CRM Plus, allowing them to access all applications and perform all operations.
Applications	Individual services within CRM Plus are called applications. For example, Zoho Desk is an application within CRM Plus.
Application Owners	Application owners are users who own a particular service in CRM Plus. For example, a user can be an owner in Zoho CRM, Desk, or Social.
Deactivate User	Allows you to disable a current user's access to Zoho CRM Plus.

Delete User	Allows you to delete a current user's account from Zoho CRM Plus.
Light user	Users who are only assigned to Projects and/or as Light Agents in Desk are called Light Users.
Owner	The owner is the primary contact person of the organization.
Subscription manager	Subscription manager is a privilege given to a user to handle payments in Zoho CRM Plus. This user will be listed as a "Subscription Manager" in the subscription manager component.

CRM	
Leads	Leads are prospective customers who have shown interest in your product or company.
Contacts	Contacts are people you communicate with for business purposes. In a B2B scenario, they can be your business partners or the point of contact for your partners.
Account	An account is a company or department within a company that your organization is currently doing business with or plans to in the future.
Deal	Deals are he most important records in any CRM system. They generate revenue for your organization.

Desk	
Help center	The help center is a repository of information for users who prefer to find solutions by reading through your knowledge base articles or the community posts. When they are unable to find answers they can get their issue resolved from your agents by submitting a ticket. Users can also start conversations and track the status of their tickets without leaving the help center.
Light agents	Light agent is a profile that can be assigned to users in Desk. It is for users who are not part of the customer support team. Although there is no limit to the number of light agents you can add, users with this profile will have restricted permissions in Desk.

Social	
Brand	Brands are the social channels for a single business unit. A brand is created automatically in your portal when you connect your first social media channel to Social.
Portal	A Portal is a space that hosts all your brands in Social. You can manage and connect your social media channels to different brands on Social.

Campaigns	
Unique open	When a recipient opens a campaign for the first time, it will be counted as a unique open. Repeated opens are not counted as unique opens.

Link click activity	Link click activity is a report element that gives detailed statistics for links in a particular campaign.

Analytics	

Dashboard	A dashboard is a way of organizing reports into a single page to gain quick insights into the key metrics at a glance.
Workspace	Workspaces are where you create and manage all your views for reporting and analysis. This allows you to logically group your data sets (stored in entities called tables) and create insightful reports and dashboards for your data. Workspaces also provide various methods to collaborate with other users and contain structural information on how the entities are related to each other.

SalesIQ	

Operator	An operator is a person on your team that will be using SalesIQ to call or chat. They'll be responding to chats and calls from visitors on your website.

AMSTERDAM

California **USA** Texas

MEXICO

CHINA Beijing

JAPAN Yokohama

DUBAI

INDIA Chennai

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