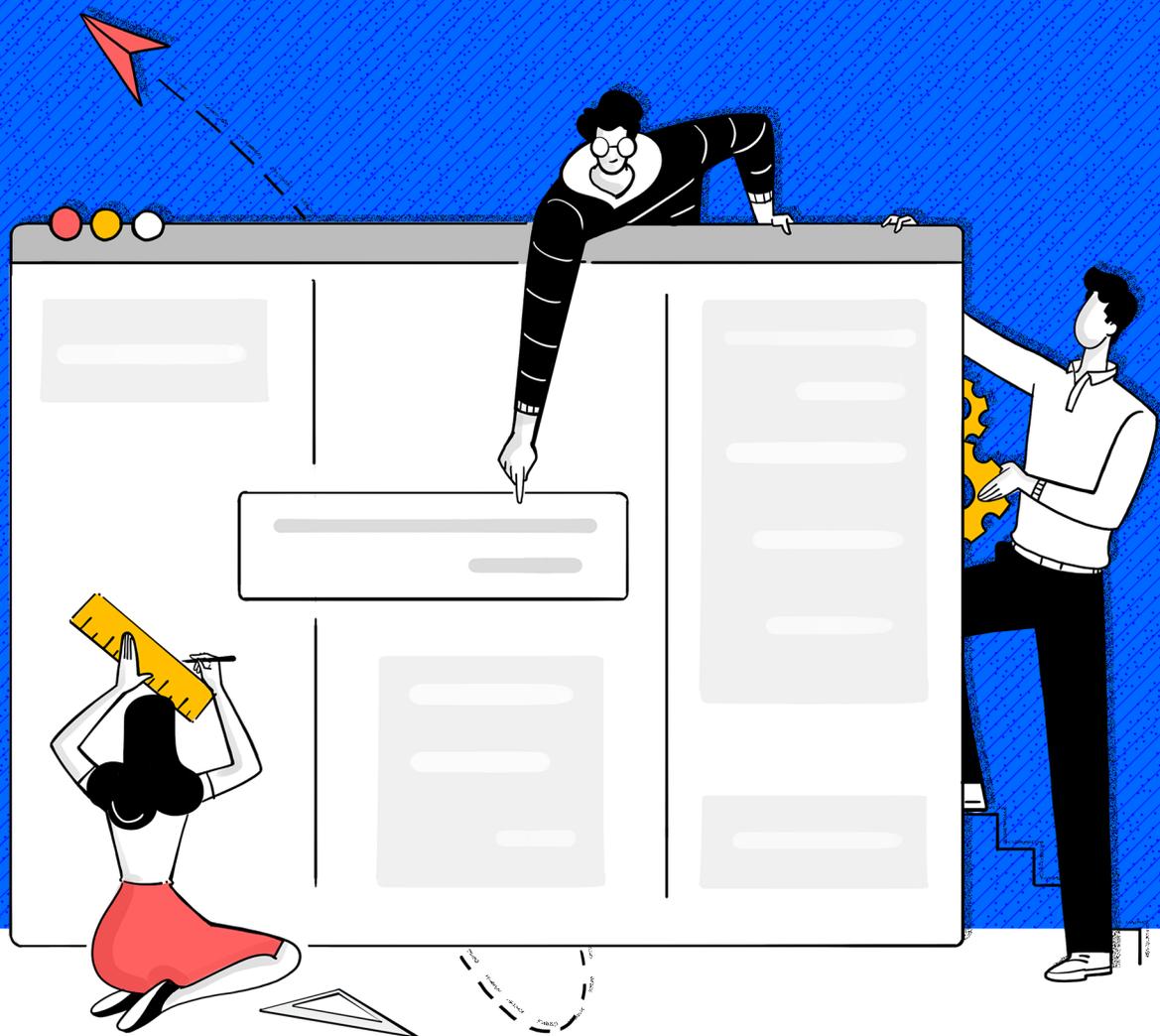


# Zoho CRM

## Implementation Guide for Small and Medium Businesses



**ZOHO CRM**

— [www.zoho.com/crm](http://www.zoho.com/crm) —

# Who can use this document?

This guide will benefit those users who are responsible for administering the CRM system in their organization, those looking at implementing CRM for the first time in their business or migrating to Zoho CRM from other CRM solutions.

## What challenges will this document address?

- **Incorrect implementation:** This guide will take you step-by-step through the implementation.
- **Limited functionalities in CRM restricting business growth:** Our wide range of features will address the advanced requirements of an expanding business.
- **Migrating existing data:** A checklist will help you prepare for smooth migration.
- **Lack of metrics to gauge CRM project success:** This guide will help you identify your business goals so that you set up the system accordingly and make data-driven decisions.
- **Poor user adoption:** The necessary training documents will help your team adopt the new CRM system.

## What are the benefits of using Zoho CRM?

- Holistic view of customers and their data
- Security of business and customer's data
- Automate sales follow-ups
- Improve communication with customers
- Better contact and deal management
- Greater coordination and efficiency within teams
- Broader spectrum for analyzing sales and marketing metrics

## Implementation Plan

- List your sales and marketing goals
- Map your sales and marketing process to CRM
- Identify the people who will access your CRM

# Table of Contents

- Introduction** . . . . . 1
- Implementation strategy** . . . . . 3
- Implementation plan** . . . . . 4
  - Define business goals . . . . . 4
  - Document, analyze, and map your business processes . . . . . 6
  - Identify the key players who will help you understand every aspect of your business . . . 13
- Start Implementing Zoho CRM** . . . . . 15
  - Set up basic organization details . . . . . 15
  - Customize the account and set up basic modules . . . . . 16
  - Identify users who will access CRM and set their roles and profiles . . . . . 22
    - Identify Users . . . . . 23
    - Create Roles . . . . . 24
    - Create Profiles . . . . . 25
  - Add users and invite them to CRM . . . . . 29
  - Enable data security . . . . . 29
  - Establish data visibility and accessibility rules . . . . . 29
  - Set up email integration and lead generation processes . . . . . 30
  - Establish basic automation processes . . . . . 32
  - Bring data into Zoho CRM . . . . . 32
  - Determine the business metrics you want to see . . . . . 34

# Introduction

Businesses are classified as small and medium-sized based on their number of employees and the turnover per year. In such organizations, the business plan is mostly growth-centric, as they continuously try new ways to engage with their customers and align their sales strategies to bring out the best. Using a software can help them run the business effortlessly, however implementing a new software into an ever-changing, growing ecosystem has its set of challenges.

We have identified some common challenges that majority of small and medium-sized enterprises (SMEs) face while adopting to a new system. We have mapped the challenges to Zoho CRM's attributes, that will help to plan the right approach needed for implementing CRM.

Challenge	Solution	What does Zoho CRM provide?
Growing business requirements may not match the CRM's functionality	Range of features to suit all requirements	You need not worry about storage or feature limitations for your growing business. Zoho CRM's editions and a wide range of features can easily be put to use for your ever-growing business.
Difficulties in migrating data	An easy migration setup	The migration setup is built to allow bulk import of files and it also lets you retain data relationships with notes, attachments, etc. You can prevent duplicates from entering the new database and also take steps to remove existing duplicates post migration.

Challenge	Solution	What does Zoho CRM provide?
Lack of metrics to gauge success and various other elements	Built-in analytics dashboard and reports to measure business growth	Zoho CRM can help you set definite goals and run reports to measure your success and failures and make data-driven decisions.
Poor user adoption	Resource materials, training documents, ebooks, and other resources	Training programs to learn directly from specialists on how to leverage Zoho CRM to the fullest extent, exhaustive documentation, and support from Zoho teams will help your team adopt the new CRM system.
Incorrect implementation	Documenting your business process, mapping it with the CRM system and implementing each step.	This implementation guide will help you plan, draft and successfully execute the implementation process.

# Implementation strategy

Setting up CRM for your company is only finished when the full cycle of planning, implementing, and rolling-out to employees is completed. While companies invest in procuring top-notch CRM systems, they spend less time and resources on implementation. As a result, many companies fail in adopting CRM even though they overcome the initial hurdle of implementing it for their business. We suggest the following best practices which you can follow to achieve a successful implementation:

## Planning

Define your business goals and strategies and plan your implementation activities around them.

## Analyzing

Confirm your requirements, analyze them, and understand their scope in the CRM environment.

## Designing

Review your business process and compare it with the CRM system to align it with your business. Analyze the integrations that are needed and prep your data for the migration.

## Validating

Assess the implementation in a test environment by giving your sales team access to the CRM account.

## Deploying

Deploy the CRM. Continue to train your team members with documentations, training materials and other relevant resources. Document their pain points and identify the areas of improvement.



# Implementation plan

Planning is the stepping stone in the implementation process. It is the most crucial and preparatory step that will lay the foundation for a successful implementation. For a proper planning you need to:

- Define your business goals
- Document, analyze, and map your business processes
- Identify the key players who will help you understand every aspect of your business

## Define business goals

Have a clear outline of what you want to achieve by implementing CRM. Following questions can help you get an answer.

- What am I trying to achieve using Zoho CRM?
- What are my key business priorities?
- What are my business plans and how do I plan to achieve them?

Listing your business objectives will help you determine what you want to measure in your CRM system.

### Sample business goals:

Business goal	How do you plan to achieve it?	What to look for in CRM
Increase customer satisfaction	Better customer engagement	<ul style="list-style-type: none"> <li>- Segment customers based on their interests, preferences, and buying patterns and plan targeted marketing strategies.</li> <li>- Engage customers through regular automated follow-ups and with a social media presence.</li> </ul>
Boost sales and process efficiency	Identify and eliminate gaps in the sales process	Streamline your business process in CRM and automate the essential processes to increase productivity.

Business goal	How do you plan to achieve it?	What to look for in CRM
Reduce operational cost and time	Automate manual and repeated processes or actions	Use workflows and macros to automate repetitive actions.
Increase cross selling and enhance client retention	Centralize all customer related data to give holistic picture of customer's sales cycle to all the teams	Have a customer's data, social media interactions, email communications, and support requests, all in one place.

**Activity sheet - Enter your business goals. (Refer Appendix I to download the complete activity sheet)**

Business goals	How do you plan to achieve them?	What to look for in CRM

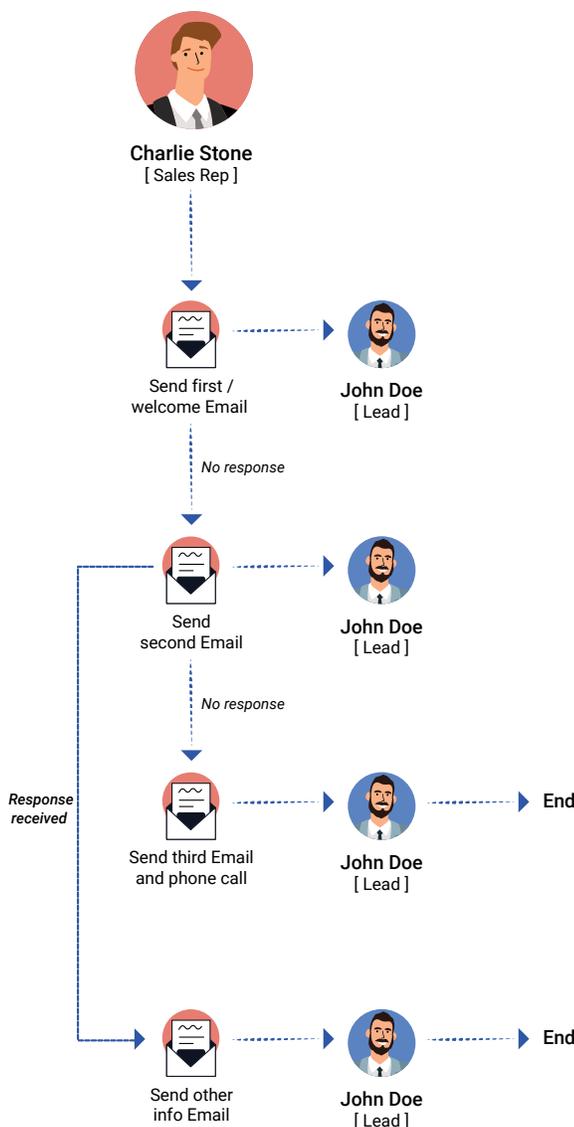
## Document, analyze, and map your business processes

Make a list of the processes that are followed in your organization, analyze them, evaluate their efficiency and make any required modifications before moving them into CRM.

### Document your sales and marketing processes

Chart out all the elements in your process and make sure your team has a clear understanding of the processes that will be implemented in CRM. Creating a flow diagram will give a clearer picture and will also serve as a reference material during the actual implementation.

#### A sample flow diagram of a lead follow-up process:



#### You can create a flow diagram of:

- How you gather and qualify your leads?
- How the leads navigate through your sales pipeline to become customers?
- The follow-up routine for prospects.
- The process for running marketing campaigns.
- The process of receiving payment after deal closure.

Make a list of methods that are used at different stages of the sales funnel, that is from lead capture to deal closure.

## Sample sales process

**Tip:** Sales processes may vary from business to business (for example, B2B, B2C, B2B2B, or B2B2C), but the basic stages involved in qualifying a lead to closing a deal will not differ much (for example, qualification, presentation, negotiation, etc.) . In Zoho CRM, you can easily manage the stages as per your sales process.

### Sample sales stages:

Sales stage	Description	Methods involved
Lead generation	The first step of the sales process. It involves capturing leads or prospects from various sources.	Trade shows, webinars and conferences, webforms, API calls, Google Ads, social media
Lead distribution, nurturing, and, engagement	Assigning leads to reach out to them sooner. Making initial contact with the leads and identifying interested customers.	Engagement over phone, emails, or social media
Lead qualification and conversion	Converting the leads that want to do business with you into contacts or genuine customers.	Manual conversion or using the lead conversion tool
Proposal and price quote	Deciding the amount and sharing the quote with the customers.	Follow-ups through phone, emails, or in person
Negotiation	Adjusting the deal amounts to customer's expectation.	Follow-ups through different touchpoints.
Closed won/lost	The deal or proposal is either accepted or rejected.	Field update, communicate through email or phone. Inform the team and managers

## Activity sheet - Document your sales process (Refer Appendix II to download the complete activity sheet)

Sales stage	Description	Methods involved

## Analyze your business processes

Once you have the process documented, analyzing each stage and the steps involved gives you an opportunity to find a more efficient approach to carry it out. Examine the above stages to identify and fix the gaps before implementing the processes in CRM. The best approach is to get inputs from the users who regularly follow the steps:

- Which steps usually cause delays in process execution?
- Which steps create bottlenecks?
- Which steps cause issues for the sales reps and other team members?

### Sample steps to analyze:

Process step	Analyze
Enquiries	Are all inquiries correctly allocated and managed?
Welcoming leads	Are all the new leads from a particular country getting a customized welcome email and is the lead status being tracked?
First reminders	Do sales reps send these reminder emails on time for each customer?
Negotiation	Are the discounts and benefits approved by the managers and are the entire team following the guideline?
Notify	Are the sales reps getting proper reminders for follow-up activities and are the sales managers notified about deal closure?
Scheduled actions	Are there any tasks, follow-ups or activities that your team does at regular intervals?

### Activity sheet - Enter the steps to analyze. (Refer Appendix III to download the complete activity sheet)

Process step	Analyze

## Map your sales and marketing processes

Once you have completed analyzing the processes, it is time to map them to the appropriate CRM features. Creating a flow diagram will give you a visual representation of the process (like the lead follow-up above) It can help you analyze:

- The extent of customization that you need to perform before getting your data into CRM.
- The processes or steps that you will have to automate.
- Any third-party applications that you need to integrate with CRM.

**Tip:** This step will also help you to decide which CRM edition you need to purchase based on the features that are supported in it.

### Sample processes and its mapping with CRM features

Sales stage	Methods involved	Mapped to CRM feature
Lead generation	Trade shows, webinars and conferences, webforms, API calls, Google Ads, social media	<a href="#">Webforms</a> , <a href="#">Google integration</a> , <a href="#">APIs</a> , <a href="#">social integration</a> (Twitter and Facebook)
Lead distribution, nurturing, and engagement	Engagement over phone, emails, or social media. Identifying the best time to contact.	<a href="#">Lead assignment rules</a> , <a href="#">telephony</a> , <a href="#">email integration</a> , <a href="#">social setup</a> , <a href="#">activities</a> , <a href="#">Best time to contact</a>
Lead qualification and conversion	Manual conversion or using the lead conversion tool. Predicting the likelihood of conversion.	<a href="#">Built-in lead conversion tool</a> , <a href="#">automatic conversion using workflows</a> , <a href="#">Scoring rule</a> , and <a href="#">Zia prediction builder</a>
Proposal and price quote	Follow-ups through phone, emails, or in person	<a href="#">Workflows</a> , <a href="#">Approval process</a> , <a href="#">automation tools</a>
Negotiation	Follow-ups through different touchpoints.	<a href="#">Workflows</a> and <a href="#">SalesInbox</a> for follow-ups

Sales stage	Methods involved	Mapped to CRM feature
Closed won/lost	Field update, communicate through email or phone. Inform the team and managers	<a href="#">Workflows</a> and team collaboration tools like <a href="#">Feeds</a> , <a href="#">Cliq notifications</a>

**Activity sheet - Map your sales process (Refer Appendix IV to download the complete activity sheet)**

Sales stages	Methods involved	Mapped to CRM feature

Another thing that you should do alongside feature mapping is identifying your business language and check its semblance with Zoho CRM’s default terminology. For example:

- If you are an **e-commerce company**, your business will use terms like wholesale products, shopping carts, discount codes, sign ups, refunds, and invoices.
- If you are a **real estate firm**, your business will use terms like property listings, brokers, warranty, holding deposit, built-up area.

Mapping CRM terminologies with that of your business will help you customize your CRM account and keep it ready to migrate your data. Here is a sample comparison list from the real estate industry:

Zoho CRM terminology	Business terminology
Leads	Enquiries
Contacts	Customers
Accounts	Companies
Products	Properties
Vendors	Brokers

**Activity sheet - Map CRM terminologies with business terms (Refer Appendix V to download the complete activity sheet)**

CRM terminology	Business terminology

## Identify the key players who will help you understand every aspect of your business

If a CRM chosen by the top management is forced upon the sales teams without their consent, it may lead to failure. Furthermore, chances of rejection can be higher, if you do not involve the right people from the start. All the people may not readily like a change and a new CRM, but you still need the right mix of people with various roles and be ready to hear disagreements, different opinions, and suggestions for a successful CRM implementation. Below is a list of some key players for the implementation team.

Members in the organization	Role in the implementation process
The leader	This person steers the team to success and is the key to driving an implementation project. This person is your project manager who knows the benefits of a CRM, has good knowledge of your business processes, and is ready to experiment with new methods. Your project manager needs to be the Subject Matter Expert who can contribute to the overall implementation of CRM.
The demander	This person is one of the strongest motivators during the implementation. They are the sales manager who will keep their sales team motivated to get the best out of CRM. They will have details of the exact reports that are needed, the various business flows that need to be captured, and what is not working in the current system and what needs to be fixed in the new CRM.
The real user	Real users are people from all key user groups such as sales reps and marketers. To get a full return on your CRM investment, your sales reps have to see real value in it. Ensure equal participation from them as they are the ones who will be using Zoho CRM daily and will have feedback and useful insights that can be considered from day one. To get constructive feedback, you could also have online discussions and surveys with focus groups including sales reps who have been with the company for a long time and those who are fairly new. It's better to include them this way rather than just throwing a completely unfamiliar CRM account at them.

Members in the organization	Role in the implementation process
The administrator	They play a critical role by bridging the gap between your CRM and the users who use it. With a good understanding of the product, the CRM admins handle requirements from multiple user teams to map their business processes in CRM. They not only set up the CRM, but also constantly work on ideas to improve CRM usage and improve user adoption.
The decision maker	Decision makers are the group of people who want to see the business grow and are usually the top officials in the company which is going to adopt Zoho CRM. They live by example and are ready to see the CRM in action. They will support you in many ways to move forward and demonstrate great interest in getting the CRM up and running.

**Activity sheet - Identify the key players in your organization (Refer Appendix VI to download the complete activity sheet)**

People	Role
Leader	Project Manager
Demander	Sales Manager
End User	Sales Rep/agent

# Start Implementing Zoho CRM

By defining business goals, documenting, analyzing, and mapping processes you have successfully planned for the forthcoming steps involved in the actual implementation of Zoho CRM.

To begin implementation you need to log in to your CRM account and do the following:

- Set up organization details
- Customize the account and set up basic modules
- Identify the users who will access CRM and set their roles and profiles
- Add users and invite them to CRM
- Enable data security
- Establish data visibility and accessibility rules
- Set email integration and lead generation methods
- Establish basic automation processes
- Bring data into the CRM system
- Determine the business metrics you want to see

## Set up basic organization details

Navigate to the CRM Setup page and add the following details in the [Company Details](#) section. The details you enter here are universal to all the users who access the CRM account.

- **Company name, logo, address, and contact information:** These details can be pulled into official email templates and signatures.
- **Time zone:** Instrumental for sending email notifications, scheduling reminders, and assigning tasks.
- **Currency locale:** Essential for the amount fields such as Deal Amount, Product Price, etc.
- **Super Admin:** User with admin privileges (profile) who is the point of contact for all billing and subscription communications from Zoho. Initially, it is the first person who creates the CRM account for the organization. It can be later changed to any user with default administrator profile.
- **Business hours:** Essential for determining a user's availability for automated actions such as workflow triggers, task assignment, and scheduled activities.

There are a few more advanced settings under Company Details that you can skip for now as they are not mandatory. For example:

- **Multi-currency:** which is only required if your business deals with multiple currencies.
- **Fiscal year:** which is used to determine forecasts.
- **Hierarchy Preference:** which is set to *Role Hierarchy* by default and can be changed to *Reporting Hierarchy* depending on how you want the CRM data to be accessed and shared.

## Customize the account and set up basic modules

The next step in the implementation process is to set up the basic modules (Leads, Contacts, Accounts, Deals, and Activities) and align them your business. The action items for basic module customizations are:

- Rename the modules (tabs)
- Add custom and special fields
- Edit field properties
- Create layouts
- Create custom views and filter records

**Renaming the modules (tabs):** Navigate to **Setup > Customization > Modules and Fields**, select the module and choose **Rename** from the more icon to edit the names of the standard modules. For example, Contacts to Clients. Deals to Opportunities.

**Adding custom and special fields:** Identify the types of data that is collected in your business, for example, sales start date, product type, product code, property ID, registration number etc. and add the custom fields to the layout so that when you import your business data to CRM, you can match it to the correct field types to avoid errors.

### Sample custom fields to start with:

Field name	Field type
Sale or purchase date	Date
Product type	Picklist

Field name	Field type
Deal amount	Currency
Product code	Number
Customer name	Single line
Product purchased by the customer	Lookup (lookup field for the product in the Customer module)

Besides these, you may also need system-defined special fields like terms and conditions, taxes, stage probability, and contact roles. You can add these default fields to the layout. Select the module and drag and drop the desired custom or special fields to the layout.

**Editing field properties:** When you edit the properties of a field, there are a range of available options that may be useful for your business. Here are some of those options:

- **Make fields mandatory:** Edit custom fields to mark them as mandatory fields, so that a user cannot save the record without entering a value.
- **Do not allow duplicate values:** Mark a field as unique. This allows you to prevent duplicate records in your CRM. For example Email Address, Passport Number, or Social Security Number are unique values that can help you prevent duplicate records.
- **Set field permission:** Specify permissions for users at the field level . For example, you have a field called Student's Total Score. This can be edited by professors but can only be viewed by office admins. Specify **Read/Write** access for the Professors profile and **Read** access for the Management Staff profile.
- **Create validation rules:** Set validation rules for key fields to ensure that the CRM stops any unacceptable data from being entered into the CRM. For example, Zylker University does not accept the application of a student with a CGPA of less than 3 for any of their courses. The Zylker admin sets a validation rule for the CGPA field that states: "If CGPA < 3, show a suitable error message".
- **Mark fields containing personal data:** If you have enabled GDPR compliance settings, this option can mark the field as containing sensitive data. Data from these fields will not be transferred or shared in the following instances: data export, API usage, and integration with other services of Zoho (Books, Finance, Campaigns, etc.).

**Create layouts:** If your company manages a range of products, services, or applications and wants information about all of them in CRM, it is usually best to maintain them separately to avoid a cluttered database. You can create layouts for individual products or services in a single module. Layouts are specific to a module, so you can create them for the module that contains the information.

For example, a university can use layouts to keep the details of their undergraduate program and the graduate program separately in the same module called “Programs”. The type of information collected from the applicants and the admission process is different for the two programs and, with page layouts, it is easy to customize the forms and set workflows to automate actions for each program.

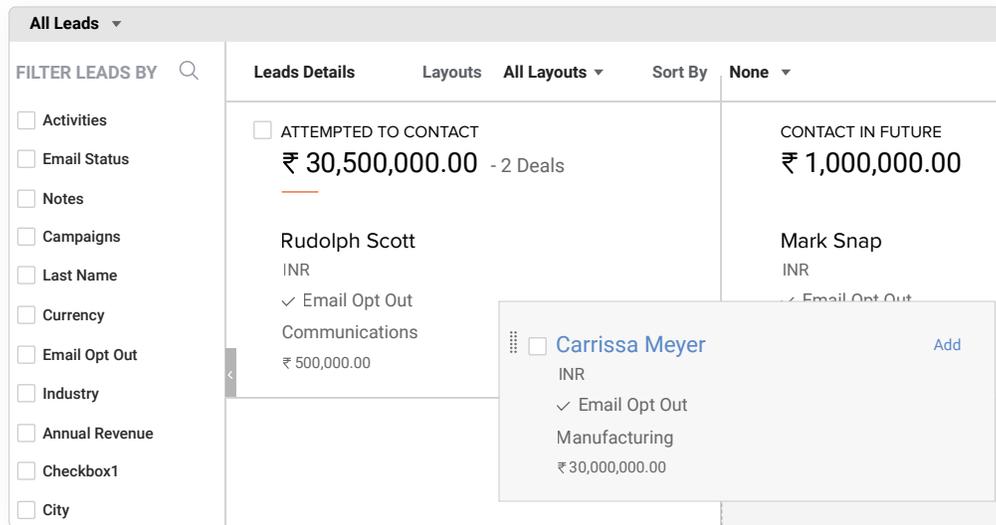
**Note:** You can configure different automation processes for different layouts. While converting leads, the lead’s details can be transferred to a specific layout in the Contacts, Accounts, and Deals modules.

**Create custom views and filter records:** The records are arranged in a sequential order within a module, called the List View. The system-defined [standard list view](#) groups the records under these categories:

- **Favorites:** Any list view that you mark as favorite.
- **Created By Me:** Custom views created by you (the user).
- **Shared With Me:** Custom views shared with you.
- **Public Views:** Views that are accessible to everyone in your CRM account.
- **Other Users’ Views:** Custom views created by fellow users.

You cannot modify these default categories, but you can [create custom list views](#). For example, you can create an exclusive view for leads from a particular region or high profile contacts or deals of a certain amount.

Similarly, you can create a [Kanban view](#) to categorize your data into an organized card-based display. The benefit of this view lies in allowing the users to drag and drop the records from one category to another instead of editing them individually. For example, whenever a lead’s status is changed from “attempted to contact” to “contact in future” you can simply drag and drop the lead to the appropriate category instead of changing the status from the lead’s detail page.



Another view, called the [Canvas view](#), will let you enhance the visual appeal of the record detail page by introducing background colors to the text, using fonts of your choice, highlighting texts, replacing regular field names with buttons, and more.

## Setup the basic modules

### Leads

Considerations	Actions	Resources
Is your business terminology different than Zoho CRM's?	Rename Leads module	<a href="#">Rename tabs</a>
Are the standard fields in the Leads module enough to capture your business data?	<ul style="list-style-type: none"> <li>- Make a list of fields that you need which are not covered by the <a href="#">standard fields</a> and add the custom fields to the layout.</li> <li>- Edit the fields and values.</li> </ul>	<a href="#">Add custom fields</a> <a href="#">Edit fields</a>
Is your database cluttered with different kinds of records?	Create layouts	<a href="#">Layouts</a>
Is your record detail page overwhelming the end-users with information? Does it have too many sections and fields that are needed based on the customer's choice?	Set layout rules	<a href="#">Conditional layouts</a>

Considerations	Actions	Resources
Do erroneous field entries cause problems for you?	Set validation rule for the fields	<a href="#">Validation rule</a>
Do you want to hide fields that contain confidential information from reps?	Set access limits	<a href="#">Field permission</a>
Do you want to streamline the way leads enter your CRM system?	<ul style="list-style-type: none"> <li>- Manual entry</li> <li>- Reps collect leads information, store in spreadsheets, and add them to CRM in bulk</li> <li>- You are moving to Zoho CRM from other CRM system</li> <li>- Capture leads form your website</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Set up data import</a></li> <li><a href="#">Migrate data</a></li> <li><a href="#">Set up webforms</a></li> </ul>
Do lead attributes play a role in deciding who leads will be assigned to?	Set up lead assignment rules	<a href="#">Assignment rules</a>
Do you want to categorize leads to a certain group based on a field value?	<ul style="list-style-type: none"> <li>- Create custom list view with the desired criteria</li> <li>- Create a Kanban view</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Customize list view</a></li> <li><a href="#">Kanban view</a></li> </ul>
Do you want to convert leads to contacts in bulk?	Set automatic lead conversion	<a href="#">Lead conversion mapping</a>

## Accounts and Contacts

Considerations	Actions	Need help?
Do you need to adjust the standard module to fit your business needs?	<ul style="list-style-type: none"> <li>- Rename the modules</li> <li>- Add custom fields</li> <li>- Edit the fields and values</li> <li>- Add subforms to capture additional details about the record</li> <li>- Declutter the layout using conditional layouts</li> </ul>	Standard fields in the <a href="#">Accounts, Contacts,</a> modules.
Do you want to track subsidiaries or franchises of a single account or contact?	Set up parent-child relationships between the records	<a href="#">Map dependency fields</a>

## Deals

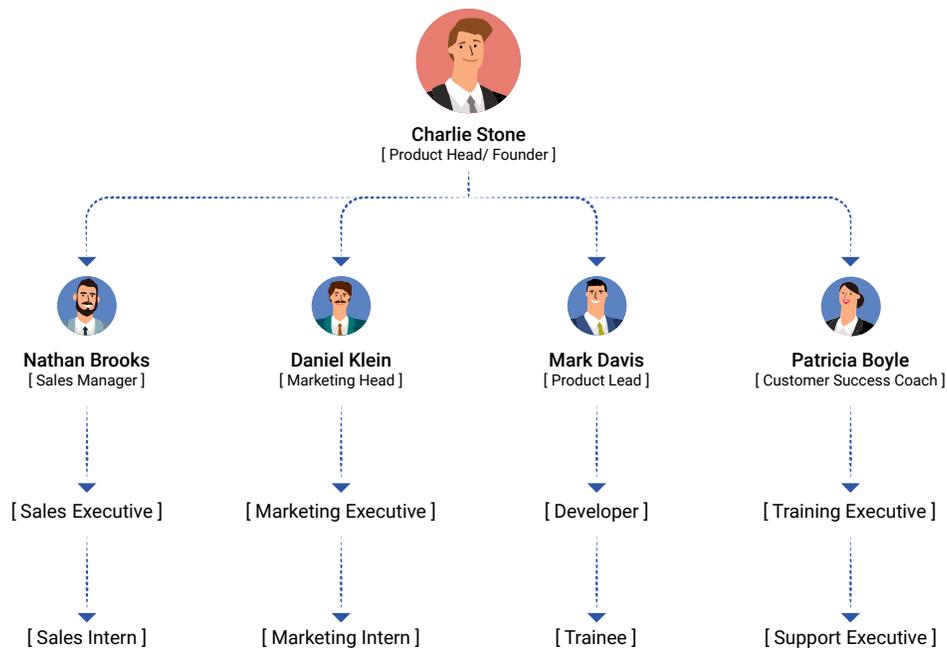
Considerations	Actions	Need help?
Do you want to customize the Deals module to your business needs?	<ul style="list-style-type: none"> <li>- Add custom fields</li> <li>- Edit the fields and values</li> </ul>	Standard fields in the <a href="#">Deals</a> module
Do you want sales agents to be able to locate information about other records from the Accounts and Contacts modules?	Add lookup fields	<a href="#">Lookup fields</a>
Does your business need you to discuss details of the deal with more than one contact in the organization?	<ul style="list-style-type: none"> <li>- Configure contact roles field and add the people with their designations</li> <li>- Exchange information based on reporting hierarchy</li> </ul>	<a href="#">Contact roles</a>

Considerations	Actions	Need help?
Does the deal stage vary from the default stages in the Deals module?	Replace or add deal stages according to your business requirement	<a href="#">Modify deal stages</a>
Do you want to quantify the likelihood of winning a deal?	Add a stage-probability field and enter probability values for each stage	<a href="#">Stage probability mapping</a>

## Identify users who will access CRM and set their roles and profiles

Let's look at an example of Zylker, Inc. and its organization's hierarchy.

### Sample diagram



Prepare a similar flow chart of your organization's hierarchy. It will help you plan the following:

- The users who need access to your company's CRM account:** You may not need to provide CRM access to all your users. Not only does giving every employee access compromises the security of your data, it also requires you to purchase more user licenses. You can choose to provide access to only those employees who will use CRM regularly, which will usually be the sales and marketing teams.

- **Roles that should be created in CRM:** Roles provide access to the data in your CRM account. A user's role tells you what data they can see. One role is assigned to each user. For example, Sarah Green, a sales rep, should not have access to the records that the sales manager owns.
- **Profiles that should be created in CRM:** Profiles provide access to the features in your CRM account. A user's profile tells you what they can do in their account. One profile is assigned to each user. For example, interns need not have permission to import or delete records.

## Identify Users

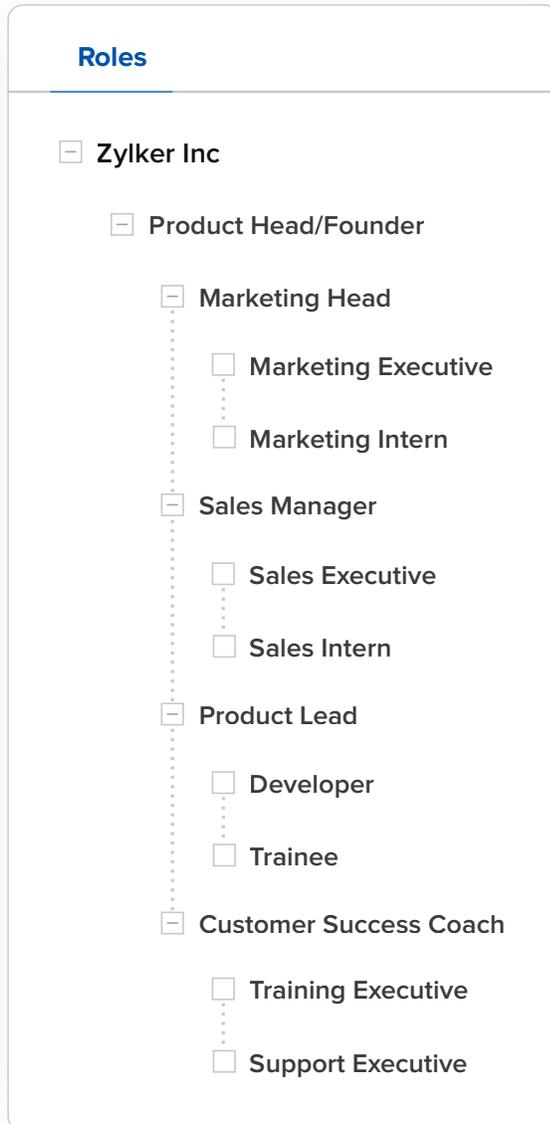
Make a list of all the users who need access to your CRM account. If you are the only user in your organization's CRM account then you will be the super admin. A super admin in Zoho CRM is a user with an administrator profile who can additionally delete users from the CRM account and receives all communications regarding billing and other financial transactions from Zoho.

### Sample list of users who will access Zylker's CRM account

Users	Job titles
Charlie Stone	Product Head/Founder
Nathan Brooks	Sales Manager
Jasmine Frank	Sales Executive
Daniel Klein	Marketing Head
Ann Candace	Marketing Executive
Mark Davis	Product Lead
Patricia Boyle	Customer Success Coach

## Create Roles

Below is a role hierarchy that replicates Zylker, Inc.'s organizational hierarchy. According to this, the interns will not have access to a sales executive's data, similarly, the executives cannot access a manager's or product lead's data. You can create roles from **Setup > Security Control > Roles**. See Also, [Managing Roles](#)



## Create Profiles

There are two default profiles available in CRM:

- **Administrative profile** has access to every feature and module in the CRM account.
- **Standard profile** has some basic permissions like viewing, creating, editing, and deleting records in modules.

The default profiles are master templates and cannot be edited. You can clone these profiles to create new ones and customize them based on your requirements. Create profiles from

**Setup > Security Control > Profiles.** See Also, [Managing Profiles](#)

### Sample list of users, their roles, and profiles

User	Role	Profile	What they will do in CRM	CRM features needed
Charles Stone	Product Head/ Founder	Super Admin	<ul style="list-style-type: none"> <li>- Complete access to CRM with admin privileges</li> <li>- Add, invite, and delete CRM users</li> <li>- Customize the platform for the business vertical</li> <li>- Set profile permission for other users</li> </ul>	- Default access to all the features

User	Role	Profile	What they will do in CRM	CRM features needed
Nathan Brooks	Sales Manager	Sales Administrator	<ul style="list-style-type: none"> <li>- Analyze sales metrics and keep tabs on the number of deals that are closed monthly</li> <li>- Generate sales and forecast reports</li> <li>- Export data from CRM</li> <li>- View sales orders, generate POs, invoices, and quotes</li> <li>- Assign leads to sales executives</li> <li>- Transfer record ownership and manage other record-level permissions</li> <li>- Handle customer escalations</li> </ul>	<ul style="list-style-type: none"> <li>- Permission to view and manage access to dashboards</li> <li>- Permission to view, manage, and schedule permissions for reports</li> <li>- Permission to export data</li> <li>- Full access to sales orders and deals modules</li> <li>- Permission to create assignment rules</li> </ul>

User	Role	Profile	What they will do in CRM	CRM features needed
Mark Davis	Product Lead	Administrator	<ul style="list-style-type: none"> <li>- Customize CRM platform for the business</li> <li>- Create workflows and approval processes</li> <li>- Manage users</li> <li>- Enable data sharing with other roles or peers</li> <li>- Import data into CRM</li> <li>- Manage lead generation through webforms and approve discounts or negotiations on higher value deals</li> <li>- Assess the need for integrating with third-party applications and other Zoho products and manage plug-ins</li> </ul>	Permissions to all the features and modules

User	Role	Profile	What they will do in CRM	CRM features needed
Jasmine Frank	Sales Executive	Standard + Administrator	<ul style="list-style-type: none"> <li>- Set up email and chat settings for the team and manage templates</li> <li>- Add leads, contacts, accounts, and deals and make edits</li> <li>- Manage organization's social media handles</li> <li>- Manage documents in CRM</li> <li>- Full access to the records they own</li> </ul>	<ul style="list-style-type: none"> <li>- Permission to set up email integration and send emails</li> <li>- Permission to view, create, and edit records in the modules, but no permission to delete the records</li> <li>- Social tab permission</li> <li>- Manage folder permissions</li> </ul>

**Activity sheet - Identify the users and their roles, and profiles (Refer Appendix VII to download the complete activity sheet)**

User	Role	Actions they will perform	CRM features needed	Profile
User 1	Their role	List the tasks they will perform	Work out which profile permissions they will need	Which profile will you clone and adapt?
User 2				
User 3				
User 4				

## Add users and invite them to CRM

Once you have created the required roles and profiles you can start [adding users](#) in CRM from **Setup > Users and Control > Users > Add New User**. While adding users, you will have to specify few basic details like first name, last name, contact number, and email address along with their role and profile. Once the users are added a system generated automatic email is sent with the access link to their accounts. Users who have not accepted the invitation will be listed as unconfirmed users and you can re-invite them.

## Enable data security

Zoho takes every care to keep your data secure on our servers. You can also configure some additional security settings to increase your level of protection.

Here are the main two settings that you can set up in your CRM account:

- **IP restrictions:** (Setup > Users and Control > Security Control > Allowed IPs)  
You can restrict users from accessing the organization's CRM account from specific IP addresses. For example, if you want your team to only be able to access CRM from the office and not from their personal devices, then you can add your office IP as allowed IP address. This will prevent the users from accessing CRM from different IP addresses.
- **Two-factor authentication:** (accounts.zoho.com > Two Factor Authentication)  
TFA adds another layer of security to your Zoho accounts. Once you enable two-factor authentication, in addition to your regular account password, you will be prompted to enter a one-time password every time you attempt to log in to your CRM account. This OTP can be received as an SMS to your registered mobile phone or via Zoho's OneAuth application.

## Establish data visibility and accessibility rules

Setting up role hierarchy and profile permissions will let you determine the default permissions for each CRM user. But a user may sometimes need to view or access data that falls outside of their permissions. You can extend visibility by [setting the data sharing rules](#).

**Module-level exceptions:** By default, the data access rights for all the modules are set to private, so that only the record owner and their manager can see the data. However, you can [edit the default organization](#) permission for individual modules or create a new sharing rule.

**Data Sharing Settings** ? Help

This page allows you to manage default organization permissions and sharing rules. Default organization permissions govern how your records are shared across the organization. To further customize your settings, you can add sharing rules, which allow you to set up permissions between two roles, roles and subordinates, and groups.

**Default Organization Permissions** [Edit All Default Permissions](#)

MODULE	DEFAULT ACCESS
Leads	Private
Accounts	Private
Contacts	Private

**Edit Default Organization Permissions**

**Leads:**  Private  Public Read Only  Public Read/Write/Delete

**Accounts:**  Private  Public Read Only  Public Read/Write/Delete

**Contacts:**  Private  Public Read Only  Public Read/Write/Delete

**New Sharing Rule**

This page allows you to create sharing rules for the selected module.

Records Shared From: Roles ▾ Sales Manager ▾

Records Shared To: Roles ▾ Sales Representative ▾

Access Type: Read/Write/Delete ▾

Superiors Allowed

[Cancel](#) [Create Sharing Rule](#)

**Record-level exceptions:** If you want to share records with others, you can use the [Share option](#) in the record’s detail page and provide full, read and write, or read only access to another user. An individual can share their records provided they have the share permission enabled in their profile.

**Field-level exceptions:** Some fields like Deal Amount, Salary, and Account Number contain confidential information and should not be visible to all the users in the organization. You can restrict a profile from viewing or editing a particular field by setting [field permissions](#).

## Set up email integration and lead generation processes

### Email integration

Centralize all customer information and email communications with prospects and customers within Zoho CRM. Email integration also gives you the option to share business emails with colleagues. Once the integration is in place, the outgoing and incoming emails will be available with the record.

The following email integration options are available:

Name	Description
<a href="#">Zoho Mail add-on</a>	Configure your email account using <a href="#">POP3</a> or <a href="#">IMAP</a> or use popular email clients like Zoho Mail, Gmail, Yahoo Mail, Microsoft Outlook, or Office 365.
<a href="#">Zoho CRM plug-in for MS Outlook</a>	Integrate your Microsoft outlook account with CRM to sync emails, contacts, tasks, and appointments.

Name	Description
<a href="#">Organization email address</a>	If you want to use a universal mailing address across the organization for all customer interactions, you can set profile restrictions to limit usage to selected users only so that ,for example, only the regional sales managers and VP of sales can send emails from the org’s email address.
<a href="#">BCC dropbox</a>	You can skip integrating your email services with Zoho CRM and continue to send emails from personal email addresses. If you want to store a copy of your emails in CRM, you can generate a BCC dropbox email address and copy it every time you send an email to the customer from a personal email address. A copy of the sent email will be stored in the record’s related list
<a href="#">Chrome extension for Gmail</a>	You can install the Chrome extension for Gmail to access your CRM account from Gmail. This will allow you to add leads, contacts, and notes to the records in CRM from your Gmail account.
<a href="#">SalesInbox</a>	The SalesInbox is well organized and helps reps categorize emails based on the recipient, i.e. lead, contact, not in CRM, colleague, manager, etc.

## Lead generation and engagement methods

Previously, you listed the various methods used by your organization to generate and engage leads. You can refer to the same list and set up the following features in the CRM account:

Lead generation methods	Lead engagement methods
<a href="#">Webforms</a>	<a href="#">Scoring rules</a>
<a href="#">Google integration</a>	<a href="#">Telephony</a>
<a href="#">API</a>	
<a href="#">Twitter and Facebook integration</a>	

## Establish basic automation processes

Activities that are likely to happen repeatedly in your business process can be automated to occur at a particular date and time or when certain conditions are satisfied. For example:

- Sending reminder emails to subscribers before their subscription end date
- Making follow-up calls to your vendors every month
- Notifying the regional sales managers whenever a deal worth \$25,000 or more is created
- Assigning leads from cold calls to a specific rep

This will help you reduce manual intervention and increase process efficiency. Here is a list of automation tools that you must configure before you get your customer data into CRM:

Automation tool	Function
<a href="#">Workflow rule</a>	Automate a set of actions like email notifications, field updates, record creation, tasks, and actions defined through functions, and webhooks by creating workflow rules.
<a href="#">Assignment rule</a>	Set a rule to assign leads with similar attributes to a particular rep.
<a href="#">Case escalation rule</a>	Help sales managers or their superiors stay on top of their projects by notifying them when a deadline is missed.

## Bring data into Zoho CRM

You can now start importing data from external sources into your Zoho CRM account. Some of the methods that you can use to get data are:

- **Data import:** If your data is stored in different repositories, you must export it and in the [file format](#) that is supported in Zoho CRM before you can begin the import process. You can import data and notes to individual modules provided your data is accurate, doesn't have duplicate entries, and the field names are identifiable for field mapping.
- **Migrate data from other CRMs:** If you are migrating from a different CRM, you can use the data migration wizard. We support migration from these CRM applications: Salesforce, MS Dynamics 365, Pipedrive, HubSpot, Insightly, and Highrise. You can see the progress of import from the [history](#) and [audit log](#).

## Some points you must remember while importing data into CRM:

- [Create assignment rules](#) to assign records to the appropriate owner before importing the records. The assignment rule must be selected not just for import, but also for creating webforms, and pushing data via APIs.
- Remember to [select a unique field](#) during import. A unique field is unique for every record (for example, email address, employee ID, or social security number). If you select employee ID as the unique field during import, CRM will look for other existing fields with the same value in your import sheet to identify duplicates. You can choose to skip duplicates, or clone or update existing records based on this unique field.

**[Pushing data from APIs:](#)** In addition to from webforms, data import, and migration, Zoho provides REST API support, which lets you integrate your CRM with any third-party application. For example, your field agents use an application developed by your organization to collect clients' data. You can integrate that app with CRM to sync data between the systems and keep it up to date. In other words, whenever data is added to the app, it will be automatically added to CRM.

Zoho CRM APIs follow REST standards with the OAuth2.0 method of authentication, and uses simple HTTP methods like GET, POST, PUT, and DELETE, which makes it easier to develop new applications or integrate existing ones with CRM. APIs like "Insert Records" and "Upload Attachments" can be used to add record information or files like text, image, video, etc.

## Determine the business metrics you want to see

The last step in your implementation process is to set up the system to reflect all the metrics that are defined in your business goals.

Sample metrics to measure using reports and dashboards:

Metrics	Report and dashboard type	Resource
<ul style="list-style-type: none"> <li>- Salesperson’s performance report.</li> <li>- Number of leads converted</li> <li>- Number of leads generated through campaigns</li> <li>- View this month sales report</li> <li>- Review a list of completed activities</li> <li>- Number of unresolved cases</li> </ul>	<p>System defined reports for leads, activities, cases, and deals module. (reports are available for all modules)</p>	<p><a href="#">Standard reports</a></p>
<ul style="list-style-type: none"> <li>- Number of deals owned by “Jasmine Frank” in “Closed Won” stage that have a revenue greater than \$10,000 USD</li> <li>- Status of cases from “Netherlands” that reported “system failure”</li> </ul>	<ul style="list-style-type: none"> <li>- Add these criteria to the standard report for deals closed this month</li> <li>- Define region and type as criteria in the case status report.</li> </ul>	<p><a href="#">Customize the standard reports by defining criteria</a></p>
<ul style="list-style-type: none"> <li>- Product that was sold the most this month</li> <li>- Industry that purchased “X” application</li> </ul>	<p>Create custom reports with the metric of your choice</p>	<p><a href="#">Custom reports</a></p>
<ul style="list-style-type: none"> <li>- Annual sales trend</li> <li>- Monthly expenditure</li> <li>- Quarterly enrollments</li> </ul>	<p>Generate reports on specific dates automatically</p>	<p><a href="#">Schedule reports</a></p>

Metrics	Report and dashboard type	Resource
Monthly and yearly sales targets achieved by individuals	Target meter	<a href="#">Analytical components</a>
Identify sales trends and pinpoint unusual behavior	Anomaly detector	
Analyze team's performance and draw comparison between data sets	Key performance indicator and comparators	
Represent business metrics and distribution of data by stage graphically	Charts and funnels	

**Activity sheet - List the metrics that you want to measure (Refer Appendix VIII and download the complete activity sheet)**

Metrics	Report and dashboard type
The metrics you want to measure	The report or dashboard type

# Congratulations!

You have successfully implemented Zoho CRM for your business. Visit our [resources](#), [help guides](#), [ebooks](#), [videos](#), and [tutorials](#) and join the [community](#) to meet your fellow CRM users and continue this journey. You can also enroll for our [training programs](#) to learn more about Zoho CRM in person from our product specialists.

**Appendix I. Enter your business goals.**

Business Goals	How do you plan to achieve them?	What to look for in CRM

Business Goals	How do you plan to achieve them?	What to look for in CRM

## Appendix II. Document your sales process

Sales stages	Description	Methods involved

### Appendix III. Enter the steps to analyze

Process Step	Analyze

## Appendix IV. Map your sales process

Sales stage	Methods involved	Mapped to CRM feature

Sales stage	Methods involved	Mapped to CRM feature

## Appendix V. Map CRM terminologies with business terms

CRM terminology	Business terminology

## Appendix VI. Identify the key players in your organization

People	Role

## Appendix VII. Identify the users and their roles and assign them profiles

Users	Role	Actions they will perform	CRM features needed	Profile

Users	Role	Actions they will perform	CRM features needed	Profile

**Appendix VIII. List the metrics that you want to measure**

Metrics	Report and dashboard type

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## Zoho CRM Resources

[www.zoho.com/crm/resources](http://www.zoho.com/crm/resources)



[www.zoho.com/crm](http://www.zoho.com/crm)