

ALL YOU NEED TO KNOW ABOUT



CRM

What does ZOHO CRM do?

Zoho CRM is a online office suite containing word processing, spreadsheets, presentations, databases, note-taking, wikis, web conferencing, customer relationship management, project management, invoicing and other applications. Zoho manages leads, tracks automated emails, tracks sales orders, logs interactions, creates relationships & makes a personable experience.

How does it work?

Once you sign up for ZOHO CRM, you will be able to view tasks, leads, and goals on ZOHO Dashboard. You can create and add leads, contacts, and accounts for customers. Over time you will be able to measure the sales pipline on a timeline. You can log interactions and customer progress, generate reports based on business needs, create campaigns and track visits.

What does it cost?

There are free trials to "try before you buy," once you have decided to go forward with Zoho CRM, you will have 4 tiers to choose from:

Standard: \$14/user/month - most basic package with slight upgrades from the free version including scoring rules, multiple pipelines, mass emails and custom dashboards.

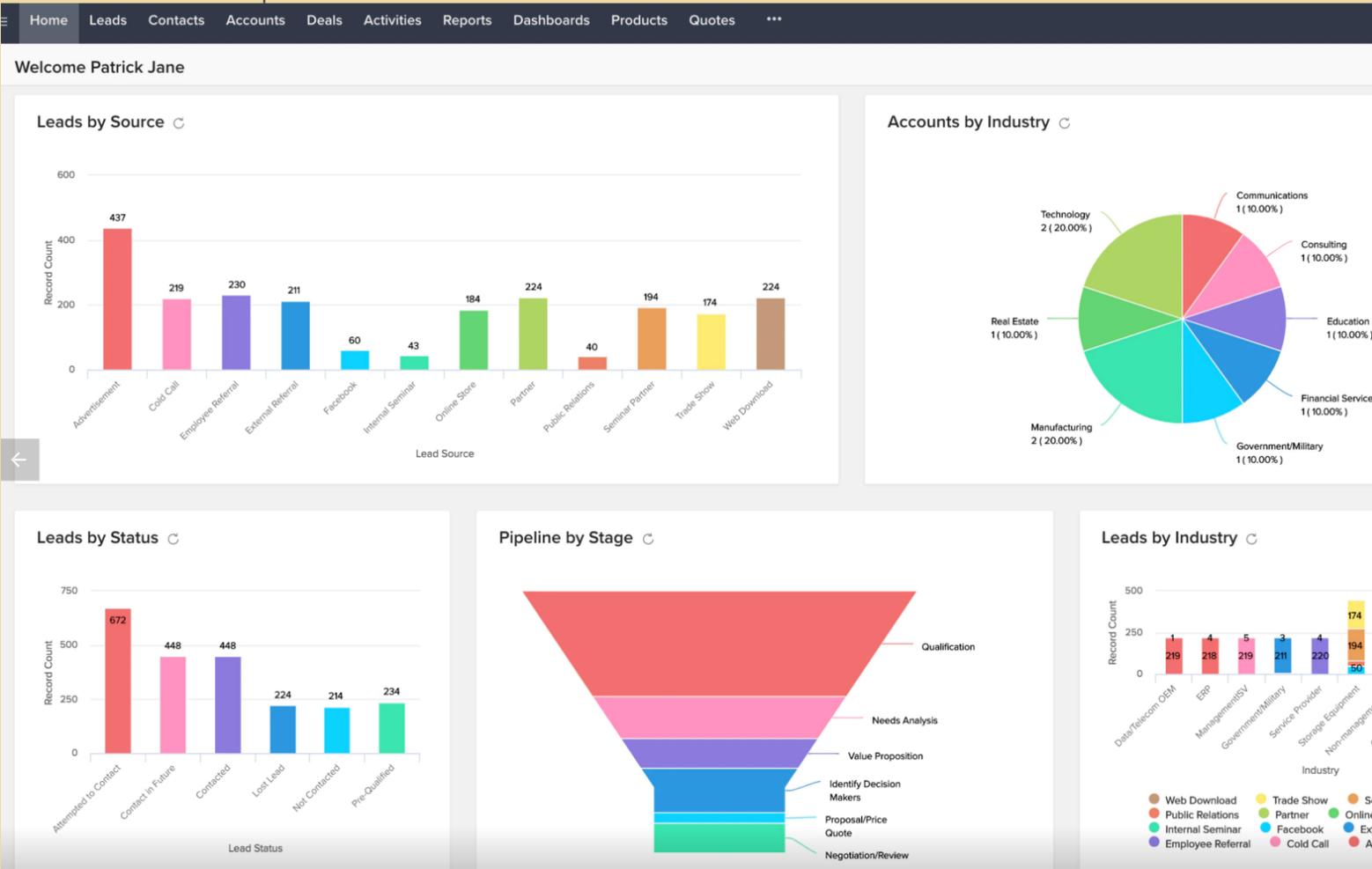
Professional: \$23/user/month - everything in the Standard package plus real time customer notifications, blueprint features, validation rules, and inventory management.

Enterprise: \$40/user/month - most popular plan with upgrades from Professional including an AI assistant, personalized command center, multi-user portals, and mobile app features.

Ultimate: \$52/user/month - all features listed above plus advanced Business Intelligence (BI) bundle.

Best features of ZOHO CRM

Better data organization, enhanced communication, easily share information, catch all leads, and know your sales numbers. My favorite specific feature is the customer data provided by extensive analytics and reports to provide ACCURATE data from across the organization. Below is an example of a users interface on Zoho:



Challenges of this tool

There are a number of issues that Zoho CRM is aware of that they are working to fix, according to the Zoho help portal. Reports of issues with mail not properly showing up in the email module upon FIRST load, menu items missing from custom function section, system replacing links in email with Zoho CRM url link.

Why did I choose this tool?

As a newbie in project management, I was attracted to Zoho CRM at first because of the aesthetics and bright colors associated with the logo and advertising. It was one of the most popular options for CRM as it was at the top of my Google search for best CRM platforms.