

ZBRAINS GUIDE TO **ZOHO CRM** **IMPLEMENTATION**



TRANSFORMING
ORGANIZATIONS THROUGH
TECHNOLOGY



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HI, WE'RE ZBRAINS!

We specialize in transforming organizations through technology, and using technology to solve business problems.

ZBrains is a division of AgileBTS devoted to helping business people work with Zoho applications in a variety of ways including: implementation, customization, and consulting.

We've been building end-to-end solutions using Zoho since 2012, and since that time we've become one of Zoho's top Premium Partners. (It's a distinction given to Zoho partners who are responsible for a certain amount of Zoho Corporation's revenue per year.)

Thanks for taking time to receive our guide to Zoho Implementation. In this info-packed guide, you'll find a full spectrum of our advice from the point of researching a new CRM implementation, through planning and selecting a vendor, all the way through to what you can expect in terms of implementation support options.

If you're ready to get started, keep reading - and don't forget, we're always just an email away!



Reach us anytime by emailing support@zbrains.net
or call (888) 207-4111

A photograph of two men standing in a factory or warehouse. The man on the left is wearing a dark suit, white shirt, and dark tie. The man on the right is wearing a dark shirt, a high-visibility safety vest with reflective stripes, and dark pants. They are both looking at a tablet held by the man in the safety vest. The background shows industrial equipment and shelving. The entire image is overlaid with a semi-transparent white triangle on the left side, which contains the text 'SECTION I'.

SECTION I

Taking a closer look at your
organization before
implementing a new CRM

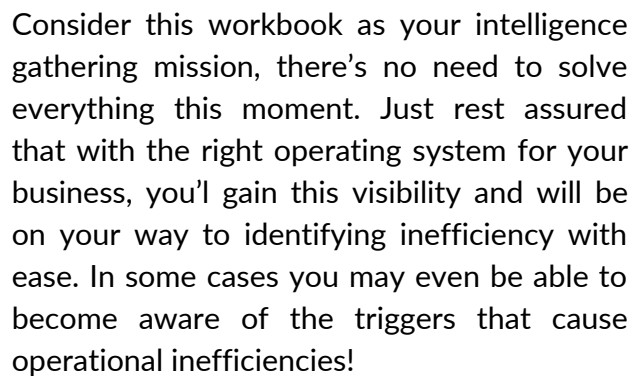


As a business owner or operator, you know how important it is to be aware of operational inefficiencies. You want to cut them off at the start, and keep your business heading in the right direction. There's a ton of business advice online; however, the goal of this article is to help you identify the areas to look for operational inefficiencies. We'll offer four considerations for you in terms of addressing the gaps in data you might experience as the operator of your business.

Get to know some indicators that your efficiencies could be off track. They're found in the realms of Planning, Scheduling & Quality Control. We think this is a great place to start, and recommend that as you work through this section, keep some notes on each of the points. Label this, "Potential Operational Inefficiencies." You can refer to this later as you uncover additional opportunities for improvement in your organization.

Now record your answers in the space on the next page:

1. Do you feel as though you don't have control of your resources - where they are and what they are working on? Write down a couple examples that come to mind.
2. Do you have visibility to planning and scheduling, or is there a lack of it? What are the areas where this is happening? Note them now.
3. Are your completed projects reflecting the quality you want for your business? Describe instances where quality isn't up to par, and what you would like to see in the future.
4. Your KPI's are falling flat. Are your metrics coming in below an acceptable threshold again and again? Or maybe you don't know what your key performance indicators are? Make note of your current state. We'll come back to KPI's in a future section.



A person wearing a red long-sleeved shirt is pointing their right index finger at a computer monitor. The monitor displays a dashboard with several analytics charts. Visible charts include 'Visitors countries' with a world map, 'Traffic origin' with a horizontal bar chart, 'Target' with a circular gauge showing 72%, 'Sales' with a line graph, 'Visitors devices' with a donut chart, and 'Downtime' with a bar chart. The background is a blurred office setting. A large white diagonal shape covers the bottom half of the image, containing the section title.

SECTION II

Developing a strategy for the metrics that matter to you



Knowing the data you're already collecting, and then defining your business goals is the first step in developing a KPI strategy for your organization. (Finding the data that's missing is where ZBrains can help.) However, right now we're going to look at the types of KPI's you should consider when creating a KPI strategy for your organization.

And be sure not to miss the end of the article. We share an infographic of KPI's you could consider for each department or area of business, and even some links for industry-specific KPI's for field services, manufacturing and distribution, and technology and SaaS companies.

You may be like the majority of today's businesses, using multiple systems to capture data about customers, leads or website visitors, financials, projects, and more.

And just like them, maybe you aren't fully utilizing the information you can access. Usually, it's too difficult, time consuming, and cost prohibitive to do reporting on regular intervals, much less on-demand. ***Does this sound a little too familiar?***

While making data-driven decisions probably isn't new to you, you can take it to a whole new level with Zoho CRM and its many integrations when you develop KPI's for each of your organization's departments. Even if you don't use Zoho, having your business KPI's in hand can become invaluable. And using your financial and organizational metrics to define strategic KPI's will result in useful reports and gained visibility to your organization.



Where should you start your KPI Strategy plan?

When you have a well-rounded knowledge of the different types and functions of key performance indicators you are able to collect and using the correct data needed to analyze your business. As a result, you'll get a stronger strategy.

(And for you Zoho users who already know about Zoho's end-to-end solution, we hope this refresher can help you find even more opportunities to capitalize on the data you collect for increased successes.)

Firstly, let's start by defining the most common types of KPI's. Then we'll share a big list of Key Performance Indicators by organizational departments for you to consider as you are developing a KPI strategy. Feel free to highlight or mark-up the ones that apply most to your business as you're reading through.

What are the types of KPI's you can use in your strategy?

Quantitative: This is among the most common types of KPI because it relies on data measurement. Generally speaking this is measurable by numbers such as total count, averages, or addition.

Qualitative: This KPI is more subjective, or based on opinions rather than hard numbers. An example could be the results from a customer or employee satisfaction survey. While you may use a numerical rating, the number is based on the individual's opinion or experience.

Input: The money or resources that you invest to generate results in your organization are considered "input." Measurable KPI's of Input include dollars spent on training your staff, research and development, and materials.

Output: Output KPI's are calculated from both the financial and non-financial outcomes of your business tasks. For example, outcomes such as revenue are financial and number of new customers acquired in a specific time frame is non-financial. [Zoho Books](#) or your [Quickbooks integration](#) provides this data.

Leading: Keeping future performance in sight means employing Leading KPI's because they are the business activities that are commonly predictive of future success or failure. An example is Daily Website Traffic, Leads Generated, New Projects Signed, etc. Leading measures can indicate success in other metrics and initiatives. (For example, a marketing project to improve SEO on site could positively impact website traffic and leads generated.)





Directional: This KPI shows whether your trends are heading in the right direction. Are your directional KPI's indicative that you need to make improvements, or are you maintaining or exceeding goals? For field services and technology companies this includes measurements like Service Level Agreement Compliance and On-Time Delivery.



More Key Performance Indicator Types for Strategy!

This set of KPI types are slightly more in depth. Challenge yourself and fellow business leaders, department managers, and other decision-makers in your organization. Ask them to consider how their area of business can use this type of KPI for deeper, performance improving insight. Add your thoughts and theirs to your notes.

Process: This KPI is an efficiency measure and keeping an eye on KPI's for process help you answer the question, "Is my XYZ process efficient, or can we improve?" The data provided in this KPI informs process changes helping your organization increase efficiencies. Ticketing systems like Zoho Desk can provide many process KPI's like new tickets created or resolution time.

Outcome: Outcome KPI's quantify the performance of a business task. You define a goal or target for your budget and "outcome" is the result. (For example customer retention improvements.) Look at churn rate or customer lifetime value KPI's for types of Outcome.

Practical: Practical KPI's are the results of your business' most personalized or unique metrics. These are based on your organization's processes and the impact of those processes on the business and can be hard to track. In other words, maybe you already know what these are, but have difficulty capturing and reporting on them. This is where the ZBrains Difference comes into play! Do you know what yours are?

Actionable: Whenever you are performing organizational changes, it's essential to determine if your teams are dedicated to the change, and if it is effective for your business. An actionable key performance indicator distills the project or program metrics. It shows you where to take the action that ensures that business change efforts remain on track.

Financial: Finally, at the heart of your business are financial metrics. Pairing your financial KPI's with other metrics allows you to craft a data story for your business. Net profit, Gross Profit Margin, and other familiar KPI's tell you if your business is healthy, viable, growing, or unstable.



KPIs by Organizational Departments

Use the following list to identify and discuss the KPI's that matter most to each of your organizational departments. Note if and how you are currently measuring each one you select, and how you are communicating them to those resources who work in each department and have oversight. What does the inter-departmental flow/communication of data and information look like? Are any of your teams left in the dark due to siloed information?

Once again, note all of your findings for this section, and then feel free to move on to the next.

SaaS and Technology



KPI'S

BY ORGANIZATIONAL DEPARTMENT



OPERATIONS

- Projects Overdue
- Capacity Planning
- GANTT Chart Status
- Utilization Percentage (Billable Hours / Total Hours)
- Effective Rate (Revenue / Total Hours)
- Overdue Tasks
- Today's Tasks

FINANCE



- Gross profit
- Gross profit margin
- Net income
- Cost of goods sold (COGS)
- Actual expenses
- # of overdue invoices
- Receivables

- Budgeted expenses
- Job Costing
- Total sales
- Total receivables
- Total payables
- Employee scheduled time
- Employee available time
- Earnings before interest and taxes (EBIT)

CUSTOMER SERVICE



- Abandoned calls per day
- Average after-call work time (offline)
- Hourly calls per person
- Field service tech utilization
- Average customer queue time
- Cost per minute of call time
- Sales per agent per day
- Leads created per agent
- Opportunities created per agent
- Email backlog
- Calls per hour per agent

SALES



- Average Contract Value
- Cost of Acquisition
- Meeting Show Rate
- Appointments per Deal
- Call Time per Day
- Lead Response Time
- Value of Lost Deals
- Average Deal Amount
- Sales Cycle Duration
- Activities in Pipeline
- Sales Efficiency

- Win/loss ratio percentage
- Sales Pipeline Velocity (SPV)
- Revenue per Agent
- # of Active Deals
- Average Win %
- Activity Value (Tasks Completed)
- Qualification Rate (Lead Conversion %)

MARKETING



- # of Leads Generated
- Lead to Customer ratio
- Customer Acquisition Cost
- Cost per Lead
- Web Traffic per Day/Week
- Return on Ad Spend (ROAS)
- Click Through Rate
- Marketing Budget Ratio
- Bounce Rate
- Campaign Response Rate
- Net Promoter Score / Brand Strength

[Get a downloadable version of this infographic](#)



SECTION III

Understanding the CRM's
Role in Customer Experience
& Using Data to Improve It



How to avoid giving a poor customer experience to your clients

Capitalizing on the best uses of your Zoho CRM – or any customer relationship management software – can improve customer experience. Customer Experience (CX) is a top initiative for many organizations. You’ve probably been hearing about it the last couple years, especially if your business relies on repeat clients, ecommerce transactions, or online leads.

But how do you start taking ‘customer experience’ into account, and make it worth your time to implement? That’s what we’re going to talk about here.

But first, we can probably all agree that the **Customer Relationship Management software you use is something that impacts every customer every time they interact with you, whether they realize it or not.**

Ensuring each experience is a good one for your customers directly impacts their lifetime value, whether or not they become a loyal customer.

Keep reading to learn a few ways to get the most out of Zoho CRM in order to give a great customer experience. Remember to keep your notes going with this section, check off things you’ve tried, and highlight the points that might be a benefit to your business.



What's the difference between Customer Experience and Customer Service?

To start, it's important to know how great CX is different from great CS (Customer Service). Customer Service is most definitely a key factor in Customer Experience, but it's only one part.

Here's an easy way to tell the difference:

- Customer Service is any interaction your customer has with a person at your business, including sales, service, or anyone in your organization who communicates with your customers. Customer Service is when you engage with and respond to customers in person, via phone, chat, or meetings. An example might be your client calling up, speaking to a sales or service agent and having an issue resolved perfectly in one short conversation.
- Customer Experience on the other hand, is any proactive effort your company takes for a customer. It's making sure that from the moment they find you, through to the post-purchase relationship, that your customer has what they need, when they need it. A great customer experience leads to loyalty. Increased lifetime value is also greatly impacted by the information you have and collect about each customer over time.

It's how you treat your customer when they don't think you're paying attention.

Now, if you just read that and thought, "I'm not a mindreader," you are not alone.

And this is where how your organization uses Zoho CRM – or any other CRM – can really make a difference in whether or not your customer experience is amazing.





What can fix a poor Customer Experience?

There are a few signals of poor customer experience that can be resolved within your CRM, and your primary users – Sales and Marketing Teams – can directly impact and improve them. Here are the things you CAN do to facilitate a great customer experience in your sales organization:

- **You DO capture the information**

Delaying the input of this information into your systems, or missing it altogether, can have a resounding impact on customer experience. Be sure to capture sales conversations, interactions, and missed interactions in real time. This is the meat and bones of your CRM, and for example, includes capturing data in-person during sales calls, as well as website metrics when customers as known visitors are on your website or interacting with your social media or marketing emails.

Zoho CRM desktop lets your sales and marketing teams capture all of this with ease. And the mobile app helps keep everything at hand for times that your sales teams are in the field. The benefit of having this information is a competitive advantage and it can aid in reducing customer churn. The result is that your customer then feels you are listening to their needs.

- **You DO listen to your customers**

The information collected from sales and marketing in your CRM helps streamline conversations, it allows customers to avoid repeating themselves. Have you ever had an experience where you had to repeat yourself to multiple agents at the same organization in order to get a resolution? How did that feel, and what can you do differently in your business to avoid that experience for your customers?

By listening to your customers and capturing information in real time you are able to provide great suggestions and service because you have enough information to do so. Listening can mean listening to a conversation you have in person. It can also mean capturing and analyzing the information your customer provides via their behavior on your website and with your marketing messages.

- **You DO respond quickly**

In our digital world where information is available 24 hours a day from the palm of your hand, it is as important as ever to respond quickly to your leads and customers. Zoho tools can help with automations, journeys, and even AI!



Use your data to improve Customer Experience

- ☐ 1. Use your CRM (such as Zoho CRM) to capture web metrics, identify which content your contacts find engaging.
- ☐ 2. Then utilize that information to have more meaningful sales interactions with every client.
- ☐ 3. Use that information to refine and enhance their experience with your company.
- ☐ 4. Harness the power of AI like Zia to create personal connections with your customers.
- ☐ 5. Streamline sales tasks and maintain efficient and timely communications with your customers.

Knowing and using a process for managing data results in a consistent experience regardless of changes in your business! **Access to organized data that is used at the right time and place can impact the bottom line. It impacts in terms of efficiency and by creating happy, repeat customers who had a great experience with your company.**

Give your customers what they want.

Here's a high-level checklist. Are you taking action in each of these five steps?

Ready for next steps with Zoho? Learn more about using your CRM data to improve customer experience.

- [Understanding Task Management](#)
- [Getting the most from CRM Activities](#)
- [Get deeper insights using Customer Segmentation](#)



SECTION IV

**Even If You
Skip Everything
Else, Read This
Section**





CRM implementation failures can happen for many reasons. Most often CRM projects fail because the solution is ineffective and doesn't improve your processes, the project was late, or it was over budget. Another indicator of failure is low user adoption, and that happens after all of your hard work.

Well, congratulations to you for being proactive! We hope the information here about common reasons CRM projects fail and what to look out for will provide the insight you need to start off on the right foot.

Keep reading for **9 reasons CRM implementations fail**, and the considerations you should address to ensure a successful Zoho CRM implementation.

DON'T WAIT

**GET THE
LIST**

9 REASONS
CRM IMPLEMENTATIONS FAIL



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9 REASONS CRM IMPLEMENTATIONS FAIL



#1) Not having a goal from the start

Every successful software implementation, especially customer relationship management software, begins with your business goals. Ask yourself:

- What are the important success indicators or KPI's for my business and sales teams?
- How do I want my business to look in 12 to 24 months?
- ...5 years from now?

Make time to invest in your vision, and document it. Your vision for success, the targets you wish to achieve, and making sure you are specific about them in planning will have great returns in your CRM implementation.

CRM Failure #2) Not customer focused

We're talking here about the experience of your system users and external customers. A successful CRM will make the work inside your business easier and more efficient for your associates by providing a trustworthy source of truth with the data it records. And the outcome is that your external, or paying customers, gain the benefit of working with a well-organized firm that provides excellent customer service as a result of having useful insight about them. Remember to give attention to both the users and external clients who will be impacted by CRM implementation.

#3) Lack of planning

The best foundation for your CRM implementation is impeccable planning, whether that's Zoho CRM or another product you might be researching and learning about. Your plan should include:

- Developing and understanding your goals (see CRM Failure 1).
- Selecting a team or partner to see you through the journey and beyond.
- Examining and documenting all workflows for every team using or inputting to CRM (see CRM Failure 2 & 4).
- Fully understanding and documenting your organization's technology stack.
- Having a plan for testing, training & deployment.
- Keeping the vision for your business' future in sight.

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9 REASONS CRM IMPLEMENTATIONS FAIL



CRM Failure #4) No one is using the tool (i.e. Poor User Adoption)

Involve your CRM users from the start and utilize their input and experiences as a part of the overall goals to gain buy-in for a system upgrade. **Learn what is important to your users and important to your business, then plan for evolution.** Consider the required phases to reach your goal. Think “crawl, walk, run”, and how a multi-stage plan will help with Zoho user adoption. (Tip: Watch out for scope creep here. Bad planning also causes scope creep. Don’t look at CRM implementation as a single project, rather a tool that you want to grow and improve with your business over time.)

Understand their challenges, workflows, and how a positive outcome will impact your business (greater efficiency!). Involving your teams in this process does help with overall adoption – and bonus – you may uncover new ideas to improve workflows with CRM! For example, data around processes like sales qualification can easily be entered, tracked, and reported in a CRM. No more managing clients through email inboxes. In the right CRM, your reminders, tasks, and saved filtered views can help deliver useful information at-a-glance.

#5) No Support (Yes, this includes training!)

Starting off knowing your internal champions and whether or not you have executive support for a CRM project is paramount to its success. **In your planning phase, identify internal champions** keeping in mind you may have more than one depending on the complexity of your business and the teams who will use your new CRM. Additionally, executive support will be indispensable when it comes to your implementation. In our experience here at ZBrains, this high-level buy in – not only regarding budget, but for strategy and execution – can make or break an implementation.

Ensure your vendor can train your teams on Zoho and offer ongoing support, if you need it. And chances are that you really will because after the switches are flipped, your teams need to be ready to go. Vendor support is crucial when taking into consideration the plan for your CRM and your business goals. Have you selected the right software and partner? We mentioned this in planning, but it cannot be stressed enough: CRM implementation shouldn’t be considered a one-off project. Look for a partnership that aligns with and enhances your business.



IV

9 REASONS CRM IMPLEMENTATIONS FAIL



CRM Failure #6) It's the wrong software

You find yourself thinking, "it just doesn't do what I need it to do" and you're putting workarounds in to practice left and right then chances are it hasn't been built or customized to envelop your workflows. This goes back to project scope. Was an important process or workflow not considered during planning? Be sure that you are talking to your software consultant or partner about planning phases for your CRM implementation, and ensuring that each stage aligns with your business goals so you don't end up with a software that isn't helping you like it should. You need a software that works for your business and improves your work. Avoid applications that slow things down, or make straightforward tasks or reporting convoluted and difficult.

After you've implemented, you might find yourself thinking, "It's not being widely used (by everyone) in my organization." ***Be sure to check in: does everyone understand their role in using the CRM, and do they have the proper training to utilize the software in the best way possible?***

#7) Your data is weird

When data is not well organized or largely incomplete, just because you put it into CRM doesn't mean you'll get great results. Knowing what data your business is tracking and why will help you understand the best way to organize it. Knowing what you want to get out of a CRM will absolutely impact what needs to go in, both in terms of the implementation and the data itself. CRM is often expected to be a single source of truth. This means that all of your associates must be on board with standards, governance should be deployed, and training is essential so that all of your teams have a similar sense of the data being entered, and how it is intended to be used. It's an old adage you've heard before, but it's still true: "Garbage in, garbage out." When you have data integrity, your CRM implementation and results will shine even greater.



IV

9 REASONS CRM IMPLEMENTATIONS FAIL



CRM Failure #8) Your vendor doesn't get your goals

Have you found the right vendor for your CRM implementation? When you're using lingo from field services and construction industries, or distribution and manufacturing, do they know what you mean? The right vendor already knows your language. They'll use their time getting to understand your unique business needs even better. Here are some things to look for (and avoid) in a partner:

- Avoid boilerplate solutions or partners who won't take the time to meet you and investigate your operations.
- If planning isn't a priority for them, buyer beware. They may just wish to capitalize on scope creep. A consultant worth their weight will tell you, you can never give them too much information about your business and your goals.
- Be sure to ask your potential consultants for references from businesses in industries like yours. Contact them.
- Look for vendors who are interested in your partnership from consulting and implementation, through to future customization and optimization. Select a partner that wants to celebrate your growth and successes.

9) You're trying to do it on your own

At your organization, maybe you've done a project like software implementation before, or maybe you haven't, but you're convinced to shave some expenses off the top by trying to do an implementation on your own. Be sure to ask yourself the right questions:

- Are your key stakeholders available to commit the time needed to implement a new CRM?
- Would this project take them away from their normal responsibilities and have a negative impact on your business?

- Does your team have the necessary skills to scope, plan, implement, train, and support a new CRM implementation?
- What would happen if any one of the team were to leave in the middle of the project? Could the others cover this gap in both skillset and time commitment?
- If you honestly evaluate the internal costs (expense and timeline) against the cost of hiring a consultant, are you still saving money and time?

Do your answers to any of these questions leave you feeling wary? Then consider finding a partner for your project. Drop us a line - we'd love to get to know you better.



SECTION V

Why Zoho is the Solution for
So Many Businesses



The decision to implement a CRM comes with a lot of choices to make along the way. As you've surely come to recognize if you're made it this far in the guide. **Two primary things you need to consider are cost of a solution, and if it will be useful to users throughout your business.**

In this section, we're breaking down both things and exploring "How Much Does Zoho Cost?" and "How to Design Solutions to Business Problems for Every Department with Zoho."

Curious? Keep reading.



HOW MUCH DOES ZOHO COST?



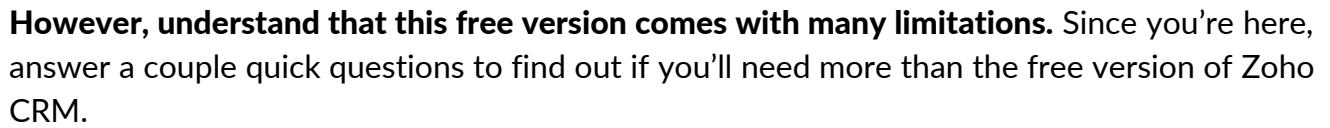
How Much Does Zoho Cost?

The pace of the business world isn't slowing and you may be looking for new ways to get work done and achieve more in your organization. Part of this is taking account for all of the activities required to become more efficient. One place a lot of organizations start is with their CRM, or Customer Relationship Management software. If you're reading this article, you're curious about Zoho and asking, "How much does Zoho cost?"

We're going to tell you more about how the cost of Zoho is figured. We'll give you points to keep in mind as you are considering Zoho CRM, Zoho Books, Zoho One, or any other application in the Zoho ecosystem. Feel free to take notes in this section, too!

How much does Zoho CRM cost?

"How much does Zoho CRM cost?" For sure, it's a loaded question. And when you search the internet for this information, you'll find a lot of variation in pricing levels. They range from Ultimate and Enterprise options to Professional and Standard. These options have diminishing features – all the way down to the amazing cost of zero dollars for Zoho CRM Free version. Yes, you heard that, Zoho CRM does offer a free version. It's not a gimmick, it's not just a trial period, and you don't have to use a credit card to get access now only to be billed later.



- ☐ Do you have more than three users?
 - ☐ Are you interested in features like:
 - ☐ sales forecasting,
 - ☐ multiple currencies,
 - ☐ scoring and assignment rules,
 - ☐ custom modules,
 - ☐ process automation,
 - ☐ or prediction and artificial intelligence tools?

If you answered YES to any of these questions...then it's time to talk about your business needs and goals and find the best fit version of Zoho CRM for you.

Of course, we'll be glad to help. And we'll talk about what working with ZBrains is like in the final section of this guide. You'll see how our Business Process Analysis is designed to ensure we capture all the information about your business AND your goals so we can provide accurate, realistic recommendations for your digital transformation. But for now, that can wait.



HOW MUCH DOES ZOHOO COST?



Because maybe you're curious about Zoho Books, too? Pairing an accounting solution with your CRM is another step toward integrating your processes. Before we get too far ahead, let's talk about the cost of Zoho Books.

How much does Zoho Books cost?

This online accounting software has tiered pricing, available add-ons, and even bundles available that can impact the pricing of Zoho Books. Each configuration varies slightly in price, so generally speaking, this solution is positioned well for small-to-mid-size businesses.

The top tier Professional plan maxes out at 5000 transactions allowing for over 500 contacts and 10 users, so this should give you a sense of its capabilities in terms of volume. In comparison, Basic version allows for up to 50 contacts and two users, while the mid or Standard plan offers up to 500 contacts and 3 users.

Books is both an affordable and powerful tool for businesses as we just explained. But more often than not, you'll need additional functionality beyond accounting and finances in order to integrate various areas of your business. For this reason, a few add-ons (for example, additional users) and bundles are available to meet those needs.

Popular bundles for Zoho Books include:

- **Zoho Inventory**, an inventory management software that easily integrates with Zoho Books
- **Zoho Subscriptions**, which helps you manage your subscription-model business in tandem with Books
- **And Zoho Expense**, to assist with and integrate your expense tracking activities with Zoho Books

Perhaps you're interested in moving all of your business processes, including CRM and Books onto Zoho? Let's talk about the pricing for Zoho One.





HOW MUCH DOES ZOHOO COST?



How much does Zoho One cost?

To start, are you familiar with Zoho One?

Did you know that one subscription to Zoho One includes access to over 40 applications?

“Zoho One is a truly revolutionary suite that can run your entire business – seriously. It has 40+ integrated applications that encompasses everything like CRM, email newsletters, documents, inventory, and more. You simply need a username and password, integrate your applications, and you’re set; one dashboard to rule all.”

Zoho One offers centralized administrative control, and all-in-one licensing model. Each of the more than 40 integrated applications come with enterprise-level features and the mobile apps included. It’s a lot, but it was designed to be just that – a full spectrum set of unified business tools that’s affordable, accessible, and impactful.

Monthly cost per license ranges from \$37 per user, per month, when billed annually for the All Users Plan, to \$90 per license, per month, when billed annually. The second option is named the Flexible User Pricing. It’s for instances when not everyone in your organization will need the applications. Pricing for Zoho’s flex plan is slightly higher, but makes sense for some instances.

We often recommend Zoho One for its flexibility to grow with the needs of businesses. You know as well as anyone that organizations grow, processes change, and business needs evolve over time. This platform gives you the tools needed to get your sales, marketing, customer support, finance, human resources, and operations departments moving in the same direction, successfully.

When you’re ready for the next steps of your Zoho implementation – or if you have more questions about Zoho pricing and whether or not any of the solutions we discussed here are a good fit for you – **we hope you’ll let us know.**



Reach us anytime by emailing support@zbrains.net
or call (888) 207-4111



HOW TO DESIGN SOLUTIONS TO BUSINESS PROBLEMS FOR EVERY DEPARTMENT



Regardless of your industry, your organization has multiple departments working together to keep business rolling ahead. This includes Operations, Finance, Sales, Marketing, Customer Service, and maybe you have others, too.

We're here to share that it's more straightforward than you might have thought to implement or design solutions to business problems for every department with Zoho applications. And for this reason, and its affordable cost, Zoho becomes an easy value-based decision for many businesses seeking a software solution that can integrate, simplify, and not break the bank.

You're about to read an overview of the Zoho solutions offered for each department of your business; however, this quick article is just meant to get thoughts flowing. In other words, it's only the start of what Zoho can do. Make sure you note the other ways your teams work together, and share with your consultant. (We'll leave you some spaces here to take notes.) The possibilities of Zoho are (not quite, but) almost endless!

If you could solve your business problems head on with a Zoho solution, how much time would open up for innovation in your organization? Put your thoughts on the page below before continuing.

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Now - Let's take a look at what Zoho has to offer for each department in your organization:



HOW TO DESIGN SOLUTIONS TO BUSINESS PROBLEMS FOR EVERY DEPARTMENT



OPERATIONS

It's a hefty lift finding an all-in-one solution for operational problems; however, within Zoho's more than 40 applications they exist. There's a good chance that you don't need – or really want – that many apps to run your business. This is where Zoho One comes into play.

While the suite of integrated applications encompass everything from CRM, finance, email newsletters, and documents, to project management, inventory, etc.; you can choose which fit your business needs. You simply need a username and password, integrate your applications, and you're set; one dashboard to rule all.

In your operations department some highlight features include:

- Project management style flexibility lets you choose from waterfall, agile, and kanban task boards.
- Team communication, collaboration, and client portal options ease keeping in touch with dispersed teams and customers.
- Order fulfillment, multi-channel selling, and warehouse management tools.
- The ability to create apps that meet the needs of specific business processes, like a Zoho ERP app developed on Zoho Creator.
- And we've only scratched the surface...

Make a few notes on the operational processes you need to address.





Zoho Books offers tax compliance, and is integrated with 40+ of Zoho's applications – or whichever you choose to use – for visibility across your business. You've got the basics and more covered in this full-scope solution including being able to see those details about your contacts, time tracking, banking, inventory, payables, receivables, and robust reporting.

- Capture and view all financial information related to your asset, liability, revenue, or expense accounts and organize them how you want.
- Simplify tax season in just a few clicks to generate tax reports so you are set when tax season arrives.





HOW TO DESIGN SOLUTIONS TO BUSINESS PROBLEMS FOR EVERY DEPARTMENT



MARKETING

Marketing departments are often called upon to design solutions to business problems, and the tools from Zoho certainly help! You'll find an arsenal of applications in Zoho to support your marketing efforts from **website creation and testing, to email marketing and social media**. And because they integrate with CRM and the rest of the Zoho One suite, you'll also get end-to-end data for a full story of lead to sale for every contact. With this sort of insight, Zoho makes answering big questions about your marketing strategy – and any adjustments you should consider – very direct.

SALES

If your sales department is like any other we've met since starting ZBrains in 2012, you're putting a lot of eggs into any CRM solution you choose. Don't dig around looking for solutions only to wonder if they'll work. We strongly recommend a partner for any CRM implementation involving this aspect of your organization and avoid common pitfalls:

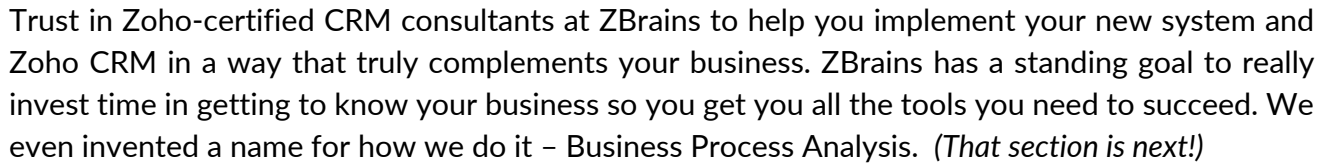
- Starting an implementation project without a planning roadmap in place.
- You've got a new tool, but user adoption is poor.
- You don't have support – and this means internal training and external partnership.
- You're trying to do it on your own and it's just not working out.

CUSTOMER SERVICE

Zoho Desk customer service app provides the platform you need for customer support teams ranging from startup to enterprise. Scaled capabilities make it easy to get the basics like customer feedback and a ticketing system, with the option to grow and add more. With small business features you gain even more capability such as:

- Automate routine tasks using blueprint,
- Optimize resource management by connecting clients with the proper support agent,
- Improve customer experience with team collaboration,
- And just like every Zoho app, the data is there and ready to meet your insights and analytics needs.





We hope this high level overview explaining how Zoho apps, and Zoho One can help you design solutions to business problems for every department in your organization has been informative.

Did you get your notes added for each department? If not, capture your thoughts now.



SECTION VI

What It's Like Working with
ZBrains Before, During, and
After Your Project



We hope that throughout reading this guide you've come to recognize that ZBrains cares about transparency, and that one of our main goals is to get to know your business in order to implement the best Zoho solutions for you.

In this final section of the guide, we'll define the steps of our Business Process Analysis, which really is "The ZBrains Difference" and we'll share what post-project support can look like.

Ready to jump in?

Process Makes Perfect:

Features of Business Process Analysis Design for Successful Implementations

If you've made it to the last section of the guide and taken a few moments throughout to capture your thoughts and ideas, there's a good chance that you already know Zoho is a viable solution for your business. After all of that you've spent quite a lot of time thinking about it. But perhaps you're just not sure how to implement.

In a potential worse-case scenario, you need to repair your system after a failed implementation. Or maybe you found us because you're not sure if a solution exists that can help you meet all your goals. Either way, we hope you're convinced that Zoho capabilities are wide-ranging, so ***finding the optimal solution – or combination of solutions – is possible***. This is why the business process analysis design is so important.

Starting off on the right foot by setting up business software correctly helps your sales, operations, accounting, and other teams communicate effectively and work more efficiently. A lot of experience and tried-and-true testing has gone into what we call "Business Process Analysis." This process ensures that a full understanding of your business needs is acquired and approved by you before you commit to any large project. **Managing expectations and adapting to change is crucial to our success together. And our process is designed around these ideals in order to serve you better.**

**Congratulations, and
thank you for joining us
for the last section of
the ZBrains Guide to
Zoho CRM
Implementations!**



FEATURES OF BPA DESIGN



Understanding the "BPA"

Starting off this way is the best of both worlds:

- You have more **control of your budget**. You get to mitigate the risk of stepping into a project that is based solely on time and materials billing.
- With greater flexibility available to possible changes in requirements, you're **not tied into a single, rigid solution that hasn't been thoroughly vetted** just so we can close a sale.
- Because we collaborate with you at each step of the system design – you can rest easy knowing that **your business is getting what it needs!**

In this final section of the ZBrains Guide to Zoho Implementation, we'll review the features of a Business Process Analysis with ZBrains that lead to successful implementation. We truly believe in this process, and that's why we use it for nearly every project that is done here at ZBrains.

Let's take a closer look at business process analysis design here at ZBrains:

STEP 1 | ASSESSMENT

The Assessment phase is foundational to a successful project. We start by understanding the current state of your business processes, and you get a better understanding of how Zoho + ZBrains can solve for business gaps – both known and unknown!

Starting here increases adoption and overall project success. Our teams translate your vision into an achievable project plan.

Because of this plan, we're more likely to achieve project success. We define a successful project as one that is within budget and timeline, but most importantly, widely adopted across the organization. After all, what's the point of implementing a system if no one is going to use it?





FEATURES OF BPA DESIGN



STEP 2 | PLANNING

Planning is our deep dive, and a phase where every stone is turned as we define each detail of your new system. We've already identified your business needs, and matched them to Zoho solutions. This step ensures everything is correct, down to individual screens, fields, automations, and more. Having a plan ensures you don't miss the mark, which can be expensive in resources and time!

This is a very short explanation of an in-depth process that's critical to each implementation.

STEP 3 | DEPLOYMENT

Your customized solutions and project plan come to life during Deployment. When your personalized plan from ZBrains gets your stamp of approval, we begin to build your system. During this time we recommend training, and after the project is completed, we also recommend support for your new implementation. Support and effective change management are critical and enables your team to provide immediate feedback and drive user adoption for a successful project launch. Efficient use of time during deployment gets you up and running quicker.

STEP 4 | OPTIMIZATION

Optimization! When your new system has been deployed, it's not over because there's very little chance your business will stay the same forever.

After that you've spent some time with Zoho, learning and working in it, you're eventually going to be ready for more - more improvements, new processes, and greater control of the data within your organization. When you partner with ZBrains, this is really just the beginning.

Interested in learning more, or need to start this conversation in your organization?

Here's how to start:

- Take a look at the infographic on the next page.
- [Visit our website and read about our past clients' experiences.](#)
- Reach out to a member of our team today - simply drop us a message to get connected by emailing support@zbrains.net



VI

BPA

BUSINESS PROCESS ANALYSIS

1. ASSESS

HISTORY

GOALS

CULTURE

VISION

The Assessment phase is foundational to a successful project. We start by understanding the current state of your business processes, and you get a better understanding of how Zoho + ZBrains can solve for business gaps - both known and unknown! Starting here increases adoption and overall project success. Your vision is translated to an achievable project plan. With this process, we are more likely to achieve a project that meets business objectives and is widely adopted; making sure it is executed within budget and on time so you can meet your goals.

2. PLAN

YOUR
BUSINESS NEEDS

ZOHO
SOLUTIONS

ZBRAINS
EXPERTISE

Planning is our deep dive, and a phase where every stone is turned as we define each detail of your new system. We've already identified your business needs, and matched them to Zoho solutions. This step ensures everything is correct, down to individual screens, fields, automations, and more. Having a plan ensures you don't miss the mark, which can be expensive in resources and time!

3. DEPLOY

YOUR SOLUTION
+ CUSTOMIZATIONS

GO LIVE
TRAINING

Deployment is where your customized solutions and project plan come to life. When your personalized plan from ZBrains gets your stamp of approval, we begin to build your system. Support and effective change management are critical and enables your team to provide immediate feedback and drive user adoption for a successful project launch. Efficient use of time during deployment gets you up and running quicker.

4. OPTIMIZE

REVIEW PROCESS +
BEST PRACTICES

IDENTIFY
ENHANCEMENT
OPPORTUNITIES

IMPLEMENT
IMPROVEMENTS

Optimization! Now that you've spent some time with Zoho, you're probably ready for more - more improvements, new processes, and greater control of the data within your organization. When you partner with ZBrains, this is really just the beginning.

[Get a downloadable version of this infographic](#)



WHAT YOU SHOULD KNOW ABOUT ZOHO SUPPORT PLANS



What You Should Know about Zoho Support Plans

For any business investment, Zoho implementations included, we recommend that you strongly consider a support plan to keep systems operating optimally, staff on board, and that you optimize for continual improvement. (Just like we mentioned in the BPA article!)

Now, this information may seem a little premature, given you're reading a guide about implementation. But as we mentioned earlier, transparency is important to us, and so are long-term partnerships. Part of both of those things is sharing with you **what happens AFTER your implementation is complete. So here we go!**

When you decide to invest in Zoho support, whether that's an ongoing, monthly support contract or hourly support agreement, your business gets timely, professional service for software updates, break/fixes, bug fixes, new feature development, and a lot more. From right-the-first-time answers for 'quick questions' to assistance with long-term Zoho ecosystem planning and support to meet your business goals, we're talking in this article about all the things you should know about software support plans from ZBrains.

What is Support Software?

Zoho support plans typically take one of two forms; long term support and incident-based help. We like this simple definition as a starting point:

"Software support services are generally technical support or break/fix services that are delivered for specific software products. These services include revenue derived from long-term technical-support contracts or pay-as-you-go, incident-based support. Software support services typically include

remote troubleshooting capabilities, installation (implementation) assistance and basic usability assistance."

– gartner.com

It's easy to see the scenarios in your business where a support plan for Zoho CRM, Zoho One, or your custom Zoho solution could come in handy; however, have you considered all the possible ways that investing in Zoho Support can benefit your organization?



WHAT YOU SHOULD KNOW ABOUT ZOHO SUPPORT PLANS



What do Zoho support services at ZBrains include?

Once you're using Zoho, a day will come when you'll ask yourself if now is the time to start using your support plan to further your business initiatives. Here are several ways that you can put ZBrains' Zoho support services to work for you.

1) New product implementation services

Remember "crawl, walk, run?" Eventually after using Zoho for a bit, or if you're an expert future planner, these scenarios may ring true for you:

- Have you identified that it's time for phase 2 or phase 3 of diminishing siloed data in your organization? You can implement those solutions through your support plan.
- Is it time to reduce double data entry by integrating your CRM and financial software solution?
- Or perhaps you need to cut down on double data entry from your e-commerce solution? We offer a full range of 3rd party integrations, and can even build a custom integration to suit your needs! We integrate Zoho and Shopify as one example.

2) Zoho product updates

Maybe you have an associate or in-house resource who's in charge of keeping IT solutions operating seamlessly, but Zoho or your customized Zoho application like FieldTech is just a little outside their wheelhouse. Stay on top of update installations and just email or call the ZBrains Support Team whenever you need help in this area. We'll help you keep running smoothly through every, numerous, Zoho update!

3) Proactive, not just reactive services

We believe proactive planning is one of the greatest functions of any ongoing support plan. We like to plan quarterly sessions with our clients. This ensures that we know your current business goals. Then your Zoho ecosystem is charged and ready to take on success! Your business won't miss a beat.

Because we're a Certified Zoho Partner, we have great insight to what's coming up from Zoho that you could potentially use, too. This takes the guesswork out of what you 'could do' and helps maximize the value of your Zoho purchase. And don't forget, you're getting a personalized level of support in any situation.



WHAT YOU SHOULD KNOW ABOUT ZOHO SUPPORT PLANS



What do Zoho support services at ZBrains include? (continued)

4) Support for custom applications

Maybe you're using a custom application that doesn't work well with Zoho, or you've already optimized for your custom needs with a Zoho Solution. Support services can help you keep them always running optimally. Whether we built it, or are inheriting a solution built by others, our support team can solve complex problems in applications that might not be working optimally for you now.

5) Product or feature implementation

Current ZBrains clients know this because they've been through the Business Process Analysis with us. And because we use this process with each client, we understand your business, we know your business. It means we can advise on best practices of how a new Zoho product or feature can be applied to what you do and how.

Software support contract pricing with ZBrains

Why would you want hourly support and a monthly support plan from ZBrains? Having control over your costs is just the start! It's really easy with two options, an hourly support contract, or a monthly one. We offer these options to give you the best solution for your business.

Many clients opt for both and here's why:

Their **monthly plan gives them access for break-and-fix** when they don't have a dedicated in-house resource, and then they use the **ad hoc hourly service to optimize**, take advantage of new features, or plan future initiatives.

Let's talk about the benefits to each, and you'll see how they can fold together for the best coverage and control of expenses.



WHAT YOU SHOULD KNOW ABOUT ZOHO SUPPORT PLANS



Hourly Zoho Support Plans

At ZBrains, our hourly support contracts include the availability of consulting services for your projects that require additional Zoho customization, integrations with other software systems, even our proprietary integrations for software like QuickBooks!

We recommend this service for experienced Zoho users. Also, for businesses that already have a dedicated resource for Zoho needs, but might need occasional assistance with highly technical aspects of Zoho. Additionally, we recommend this for very small businesses with simplified systems that are not heavily customized. You can use hourly support as needed. Support hours are sold in blocks of 8 hours, and expire one year from purchase. With your Zoho Support Hours from ZBrains, you can:

- **Dedicate some of your hours to education/training** to stay on top of the ever-changing and improving Zoho experience.
- Use hours for quarterly planning and **support your business growth plan**.
- Earmark some of your hours to **new implementations** and take them bit by bit for better user adoption.
- Plan to **use some hours to break fixes**. Now, your teams aren't left hanging when something isn't working quite right.

You can be proactive with hourly support! It gives dedicated time toward understanding and implementing best practices, and lets your optimizations become incremental instead of large projects that need more time. Take time now, and complete more, smaller work items over time, and next thing you know, you're more agile.



WHAT YOU SHOULD KNOW ABOUT ZOHO SUPPORT PLANS



Monthly Zoho Support Plans

We recommend this plan for clients with no in-house resources, highly customized solutions, and/or who have a lot of Zoho-to-Zoho integrations.

- The greatest benefit to investing in monthly support is stability: you control and anticipate the expense of break-and-fix service, and ensure your Zoho system is always primed for peak performance with no surprises.

Both of these options help with reaching your business goals in a measured manner. They keep you aligned with a budget, and keep you on top of the game in terms of your Zoho ecosystem and business operations. Still unsure what the best approach is? Our team is always here to talk through it with you – just let us know!

ZBrains makes Zoho support straightforward and accessible

Zoho Support, Zoho CRM Support, and more are all just an email away. At ZBrains, our Zoho Certified Consultants and Developers are US-based, and with a simple email to our Support team, your ticket (via Zoho Desk, of course!) gets routed directly to the person or people who can help.

What's Next?

If this guide has helped you, or if you have any additional questions about Zoho, its capabilities, or how ZBrains can assist with your implementation or support needs, we'd love to hear from you.

Thanks again for reading!



Reach us anytime by emailing
support@zbrains.net
or call (888) 207-4111

www.zbrains.net

