

The WRS News Letter

For

August 2010

Enterprise Caliber CRM With Zoho CRM



In this first issue of the Web Resource Solutions Newsletter, we're going to talk about a product that should be of vital interest to any small business owner concerned with increasing sales - and, of course, who isn't?

This particular product falls under the Customer Resource Management (CRM) and Contact Management categories. It has the ability to manage marketing campaigns, post-sales support, and business activities, track leads, create forecasts, reports and dashboards, create and manage web-based contact forms, and even manage inventory. That's quite a bit, but that's just for starters. So, the big question is then, how much is all this capability going to set you back? In a nutshell, *nothing. Nada. Zip.*

You must be asking yourself, "Self, where's the catch?" The short answer is, there isn't one - not really. The only restrictions are that you can only use it for free for a sales team of up to three, but for a small business, that's not very limiting. Also, there are some other high-end features that only come with the "paid" versions. But we'll get into that later.

The name of the product? **Zoho CRM.**

The reason I chose this particular product is that it exemplifies several important technologies out there that are key to WRS's approach to bridging the gap between "Enterprise" solutions and those that are typically being used less effectively by smaller businesses. So, let's begin with some background, shall we?

Cloud Computing and "Software as a Service"

One emerging trend in computing that has big promise for small businesses is "Cloud Computing" or "Software as a Service" (SaaS - pronounced "sass," as in "sassy"). Essentially, SaaS is software run on a computer owned and operated by someone else that you gain access to using the Internet, known as "the Cloud."

For a small fee, or often, again, for free, a third-party, or "host," purchases and maintains the computer hardware and software and you simply login over the Internet and type away. You may be familiar with Gmail, Hotmail, or Yahoo! Mail - these are great simple examples of SaaS software. But email is only the beginning. There are SaaS offerings for many of the applications you use every day, and, in another newsletter, we'll explore them in greater detail.

Zoho CRM

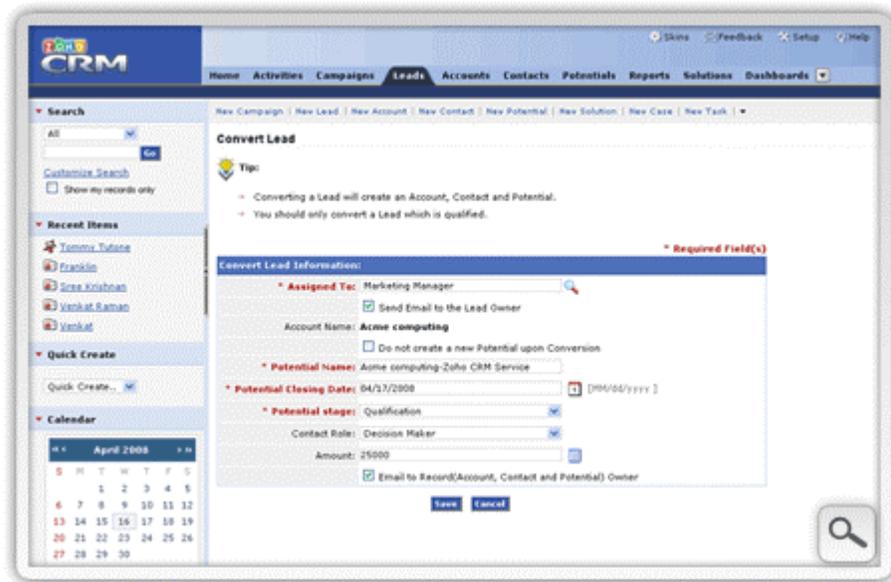
The “Zoho” company is a software vendor that offers dozens of free and low cost solutions that are ideally suited for small and medium sized companies and has won several awards, including a 2008 PC World “25 Most Innovative Products Award” and a 2007 TechCrunch “Best Enterprise Start-up.” The Zoho product is a feature-rich CRM that offers almost all of the characteristics you’d expect in this type of product via the Internet at no cost for up to three users.

To use Zoho CRM, you simply sign up at the website and start entering data. It’s that easy. The great thing about this approach is that there are no up-front costs in terms of hardware – it runs on their servers and is accessed over the Internet – and there is no investment in staff to maintain the computer systems it uses. Everything you need to operate the software is included, so you’re up and running in minutes. You can even import your existing customers and lead files directly into the system, and although the free version limits you 1500 leads/customers per batch, total storage is virtually unlimited.

The Zoho CRM product offers a host of other important features to assist in your Sales and Marketing efforts. Here are just a few:

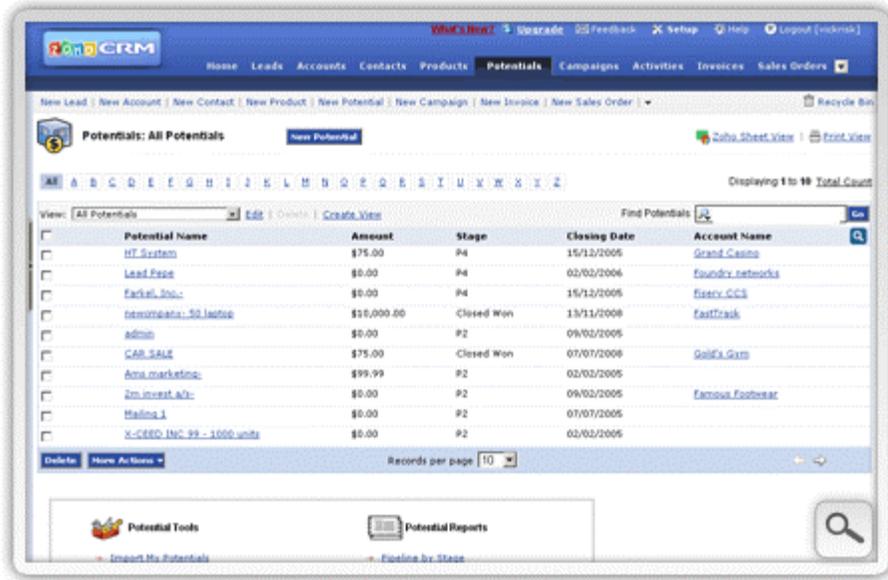
- **Manage Leads**

Automate and accelerate your lead management (lead generation - qualification - conversion - sales opportunities). Capture leads directly from your Web site using Web-to-lead form and manage effectively in Zoho CRM (I personally love this feature!)



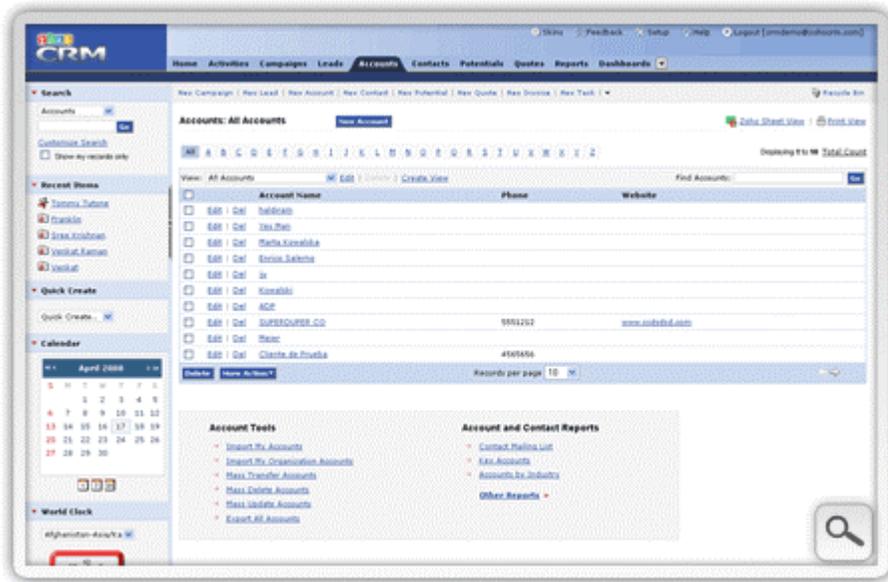
- **Track Sales Opportunities**

Track all sales opportunities end-to-end in a sales cycle. Import Sales opportunities from other CRM solutions and services, like ACT! and Salesforce. Associate Sales opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities (360-degree view).



- Manage Accounts

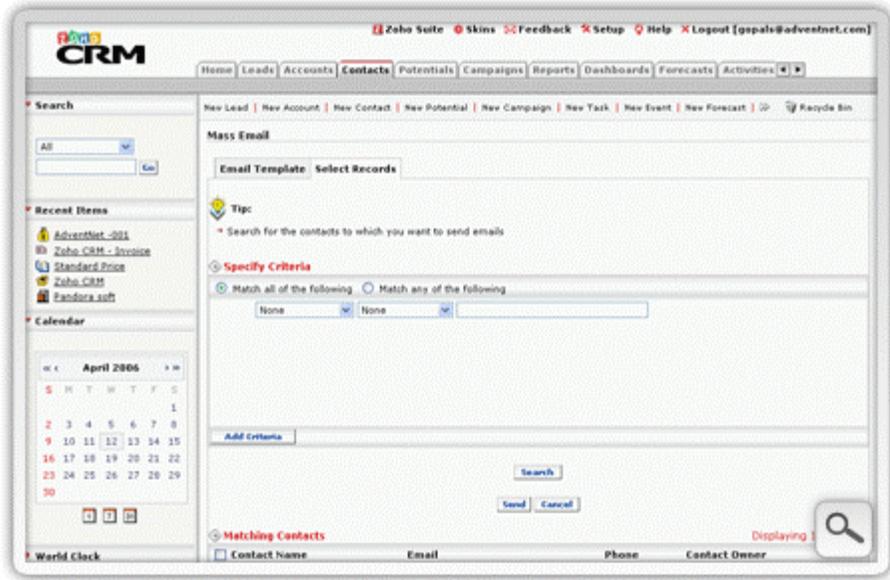
Track all accounts and related contacts, opportunities, and other details from a common repository. Generate quotes, sales orders, and invoices for the accounts. Track purchase history of the customers and analyze opportunities for up-selling and cross-selling in the future. Identify referrals from accounts and contacts for promoting new products and services.



- Manage Business Contacts

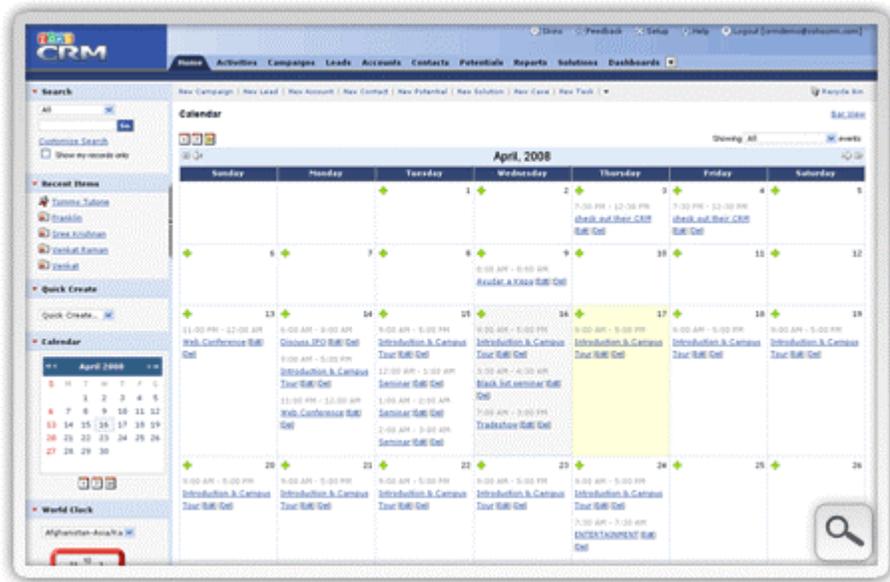
Track all contacts and related sales opportunities, sales activities, and other details from a common repository. Import sales contacts from external sources and other business applications. Set up contact assignment rules to automatically assign contacts to the sales force in your organization.

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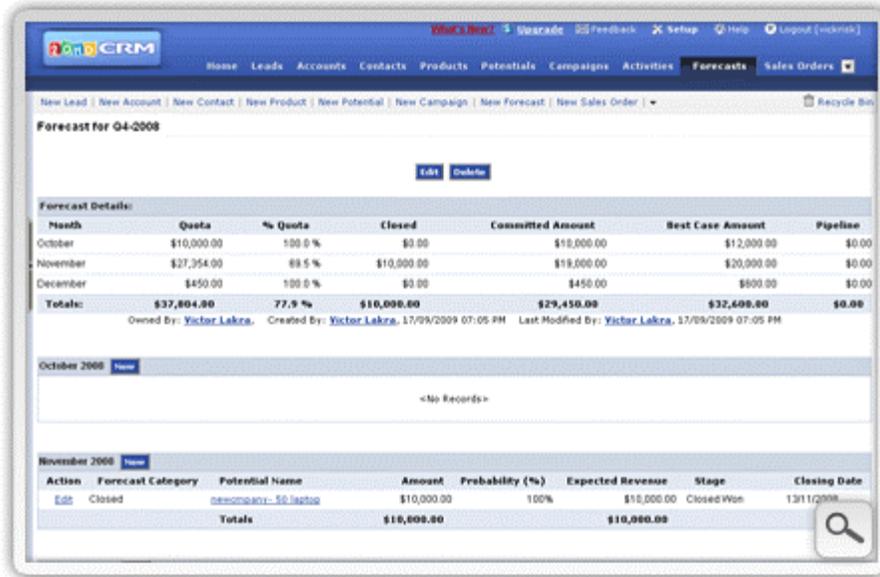
- Follow up Sales Activities

Log all important customer-related emails into your CRM account for a quick reference in future. Store customer meetings and calls in an intuitive calendar. Manage daily tasks of the users to have a streamlined sales process. Invite staff, leads and contacts for public events. Set up recurring events with daily, weekly, monthly and yearly frequencies.



- Forecast Sales

Estimate how much revenue you can generate in each fiscal year. Identify the sales persons who met their targets for fiscal quarter/year. Predict the revenue generation for upcoming quarters. Create fully customizable forecast reports and dashboards. Generate Sales Quotes.



This is just a sampling of the features included in the software package, but from this list, you can see Zoho CRM is a full-featured Contact Management and Customer Relationship management system.

Pricing

For the small organization, Zoho CRM is virtually free for up to three users (I say “virtually” because there are a few features you can add-in for between \$3-5 per month). After that, users can be added at \$3 per month each (the first three are still free, so five users is \$6 per month, ten is \$21, and so on). Again, Zoho operates the equipment, maintains availability, and provide the software at no charge.

As I mentioned, there are limitations to the free version – you can only create five reports, three dashboards, and one web form, and there are certain advanced features that can also include charges, such as inventory management and email integration with Outlook. But, these shouldn’t present problems for a small company, so maintaining an effective system free of charge shouldn’t present issues.

As your company grows, you can update to the professional edition, which is \$12 per user per month, or the Enterprise edition, which is \$25, but again, these prices only begin with the fourth user, so the first three are always free.

You can compare this pricing arrangement with products like ACT!, which runs on a desktop computer and retails for \$299 for one user, and Salesforce, which uses a similar “Cloud” format and costs around \$25 per person per month for similar capabilities and up to \$250 per person per month for the Enterprise edition.

Overall, Zoho CRM is a great way for small companies to get control of their sales and marketing efforts with zero upfront cost, while retaining the ability to scale upwards as your company and sales grow. Next Month, we’re going to discuss “Virtual Appliances” and how they can drastically cut IT software and hardware costs for small businesses.

For more information, visit the Zoho CRM website at: <http://www.zoho.com/crm/index.html>

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