Help Sales Teams Reach Out to the Right Prospects and Win More Deals

Zoho CRM Plus

ZOHO

About this Solutions Guide

In this solutions guide you'll learn how your sale teams can reach out and connect with the right prospects, effectively engage with them, and win more deals by using the marketing automation and customer relationship management functions in Zoho CRM Plus.

Target Audience

Sales representatives or users with similar roles.

Overview

Let's consider the following scenario:

Craig works as a Marketing Executive at Zylker, Inc. and does most of his marketing activities manually. He makes a list of prospects from trade shows, phone enquiries, websites, and social media, updates them manually on a spreadsheet, and sends it to the sales team daily.

Nancy, who works as a sales rep at Zylker, Inc. receives the list of prospects in an Excel file. She does most of her sales activities manually and has no clue which of her prospects are interested in her company's products, no insights into the conversations Craig has had with her prospects, and none of the latest marketing materials to share with prospects. As a result, she spends most of her time contacting them and her follow-ups are exhausting and ineffective. Craig, on his end, has no clue which prospects qualified as leads and how many were converted into sales.

The problem that Craig and Nancy have can easily be solved by using the marketing automation and customer relationship management functions together.

What is Marketing Automation?

Marketing automation is a tool that automates marketing activities and helps you focus more on lead generation, the source through which the leads were generated, and how you can personalize your communication with those leads. You can streamline lead generation, segment leads according to their interests, demographic details, and more, assign scores, and nurture leads. Ideally it includes features like email marketing, campaign management, lead scoring, and workflows.

In the above scenario, with marketing automation, Craig can send emails to the list of prospects instead of sending it to Nancy, determine their interest by tracking their responses, manage email campaigns, assign scores to leads based on the prospects' interests, and then qualify them. Nancy can get a 360-degree view of her leads, gain useful insights into their behavior, understand their interests better, and more effectively engage with them.

What is Customer Relationship Management?

Customer Relationship Management (CRM) is a tool that helps you manage, store, and organize information and interactions you have with your leads and customers. You can interact with prospects, have better follow-ups with them, and convert them to leads. It enables you to collect meaningful data about leads, manage the entire customer life cycle, generate more sales, and increase sales productivity.

Now that you have an idea about market`ing automation and customer relationship management, let's look at some of the benefits your sales team have in using these two functions together.

Benefits of Using Marketing Automation and CRM Functions:

1. Better collaboration and visibility into sales and marketing activities

Marketing automation and customer relationship management functions ensure better collaboration between sales and marketing teams because they have greater visibility into each other's activities. Sales reps receive notifications of qualified leads when marketing teams generate them. Sales teams have more contextual information about the leads in their CRM to better customize the sales pitch and engage with them. The marketing teams also have clear visibility into sales data, like the number of leads that converted to sales, leads in the sales pipeline, and the number of deals lost.

2. Prioritization of leads

Using marketing automation, the marketing team qualifies leads and sets subscriber scores to prioritize them, which then get automatically updated in CRM in real time. The sales team can gauge the level of the lead's interest to buy the product, prioritize them based on their subscriber scores, and schedule timely follow-ups with them.

3. 360-degree view of leads

Leads are generated from different sources, whether it be campaigns, social media, trade shows, events, phone enquiries, or email—and they can contact sales reps through just as many channels. It's imperative that your sales reps have the information they need to understand their expectations, and meaningfully engage with them.

With marketing automation and customer relationship management, sales reps get real-time lead updates across all touch points. They have the lead source, channel, subscriber score, and any interactions they've had with the marketing team automatically added to their CRM. These behavioral insights provide valuable information for sales reps to be better equipped to know when to contact leads, make calls, send personalized emails or quotes, or offer discounts on products. They can build the perfect sales pitch and ultimately drive more sales.

4. Tracking customer engagements and nurturing relationships with customers

The sales rep's job doesn't end with the sale. They need to nurture relationships with existing customers, retain them, and keep them strongly invested in the brand to cross-sell and upsell products. Sales reps can send emails on things like product offers and seasonal greetings and, based on the responses they receive, cross-sell or upsell products and thus nurture relationships with customers.

5. Centralized document management system

Marketing teams create or update collaterals periodically so that sales teams can use them during prospecting. Having a centralized location for marketing collaterals ensures sales teams have access to the latest versions at all times.

Well, now that you know the benefits of using marketing automation and customer relationship management functions together, did you know that there's a tool that can help your sales teams use them effectively?

That tool is **Zoho CRM Plus.**

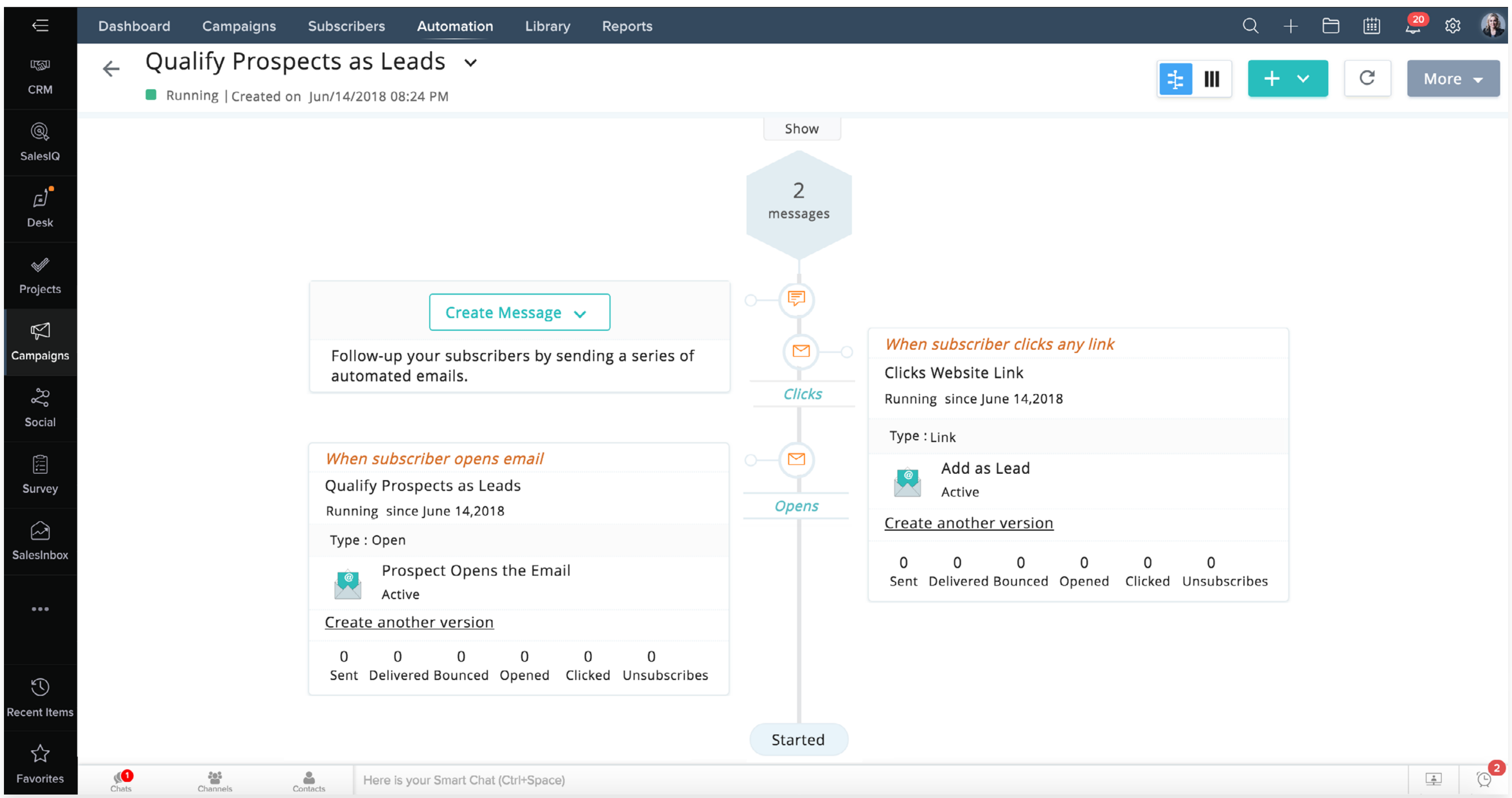
> *Zoho CRM Plus is an end-to-end customer engagement suite that allows you to automate every stage of the customer journey and provide a consistent customer experience. With Zoho CRM Plus, improve operational efficiency, maintain customer satisfaction, and accelerate business growth.*

How can Sales Teams Reach Out to the Right Prospects and Close More Deals in Zoho CRM Plus?

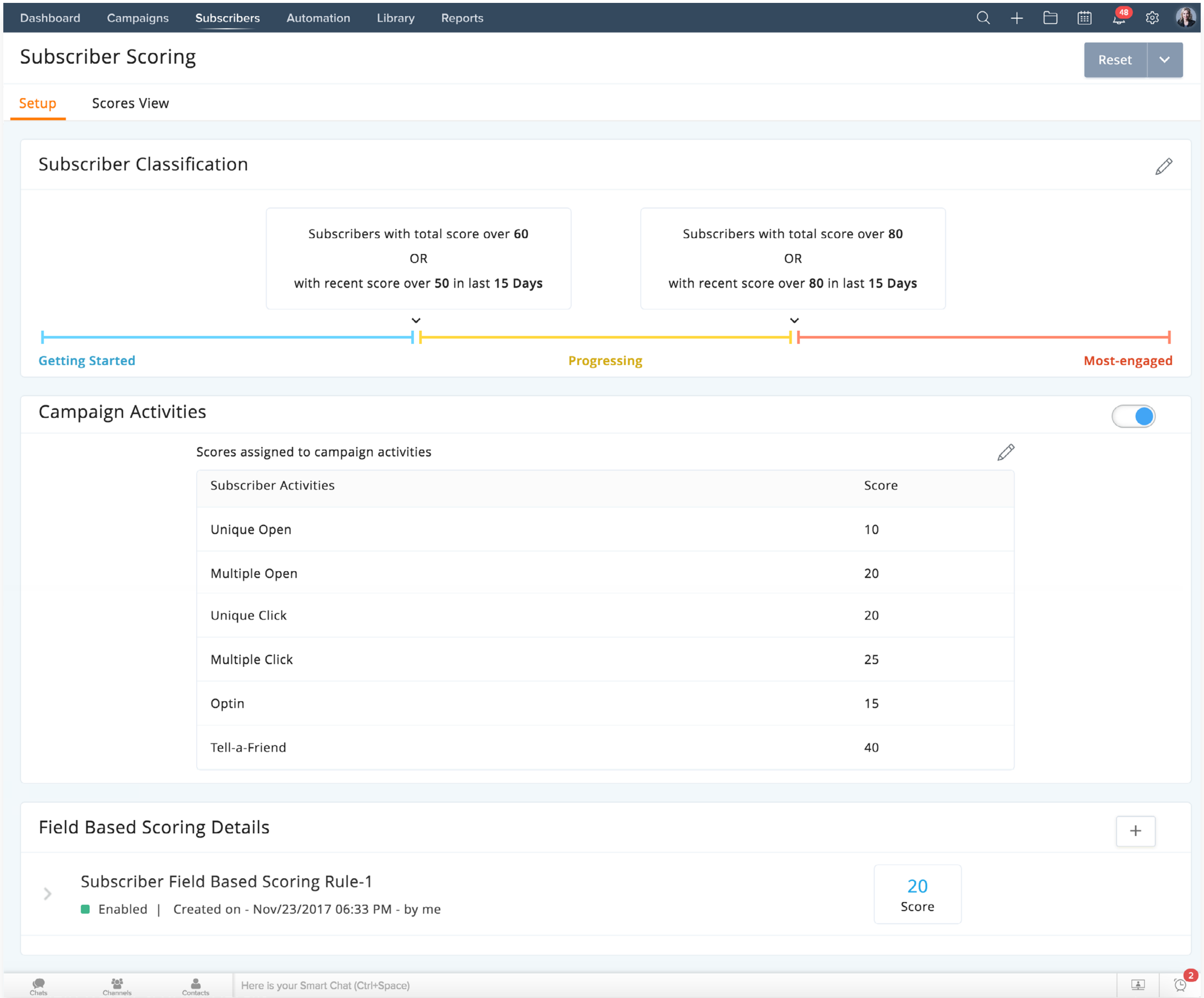
Engage with prospects, progressively build your relationship, and turn them into buyers.

Let's say the marketing team of Acme Inc., organizes a trade show and releases an advertisement inviting people to it. The marketing team then captures the details of prospects who attend the trade show, both manually and online, in CRM.

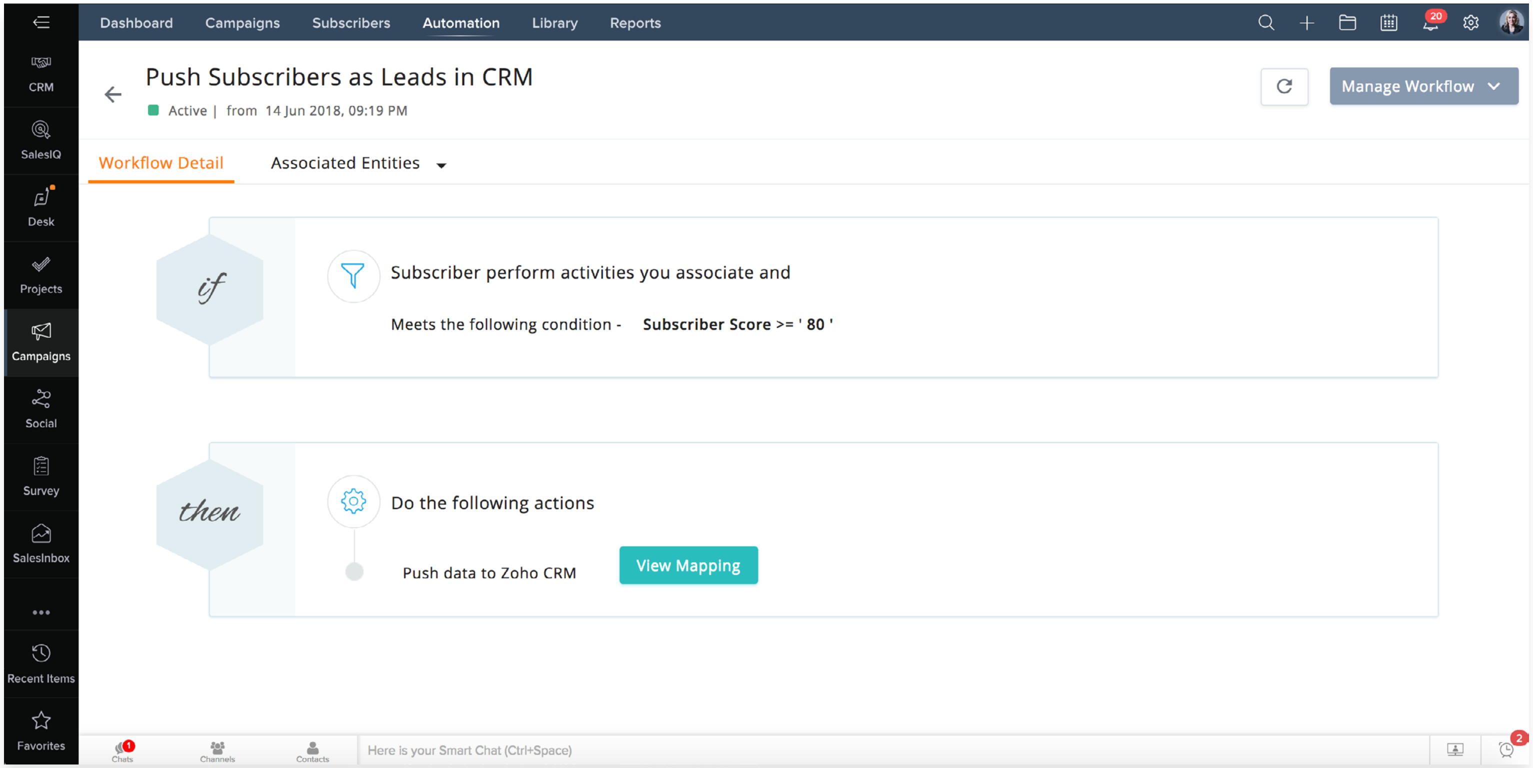
They create a mailing list in Zoho Campaigns and an autoresponder email to thank prospects who attended, and automatically convert the prospects that click the website link from the email campaign into leads.



Additionally, to qualify leads who've clicked the website link, the marketing team sets subscriber scoring rules in Zoho Campaigns to prioritize them.



They also create a workflow rule to automatically add leads in Zoho CRM based on the prospects' subscriber score, to help them follow up with qualified leads.



Jeff Stevens, a prospect, attends the trade show and receives the email from the marketing team. He opens the email, clicks the website link, and is identified as a qualified lead.

Amelia, who works as a sales rep at Acme Inc., receives the list of leads for follow-up and Jeff Stevens is one of them. Now let's see how Amelia can use Zoho CRM Plus to follow up with Jeff, gather information about him to customize her sales pitch, engage with him better, and close the deal.

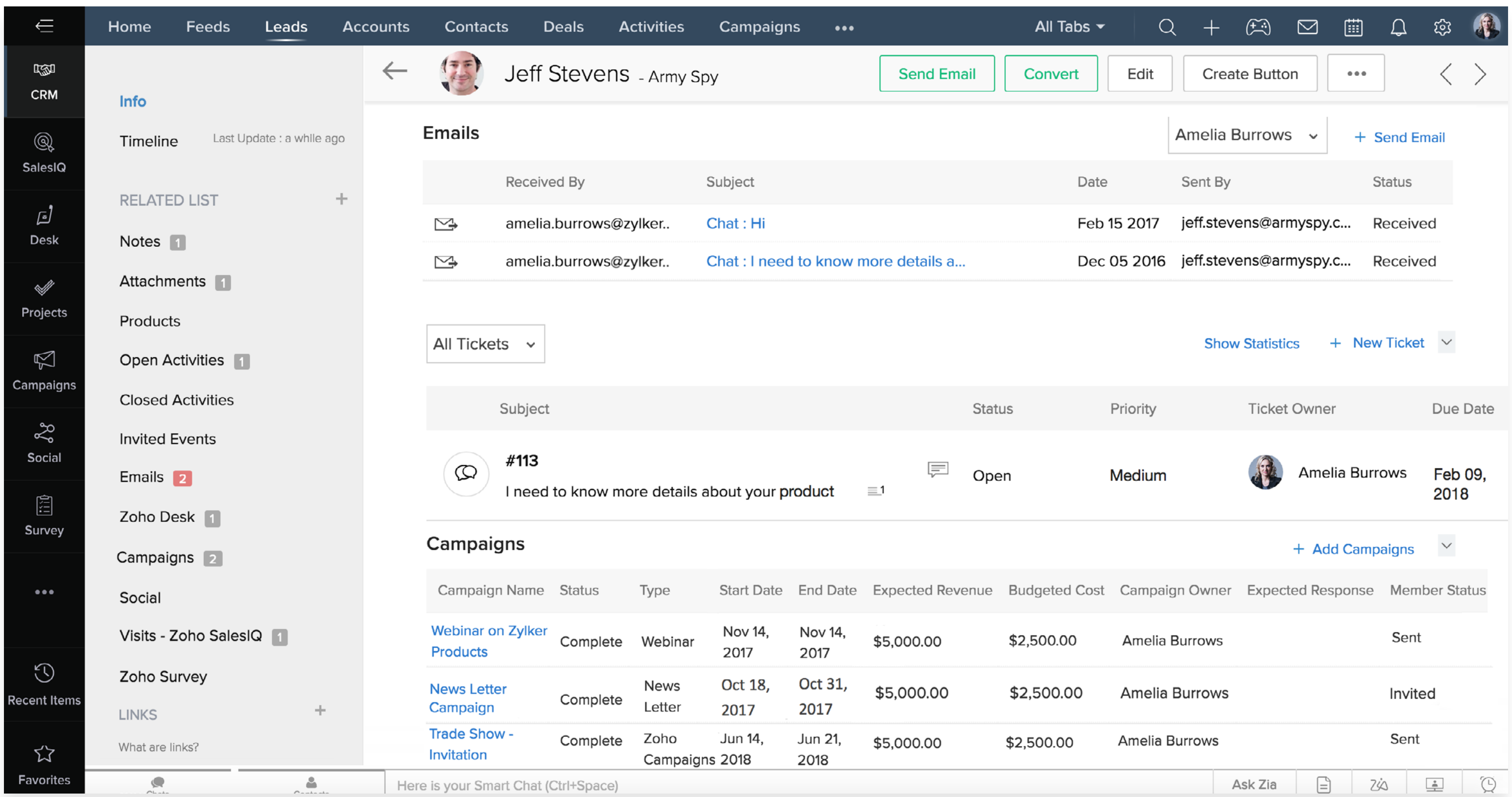
With Zoho CRM Plus, Amelia can:

Get real-time insights for leads, have up-to-date contextual information, and engage in more informed conversations.

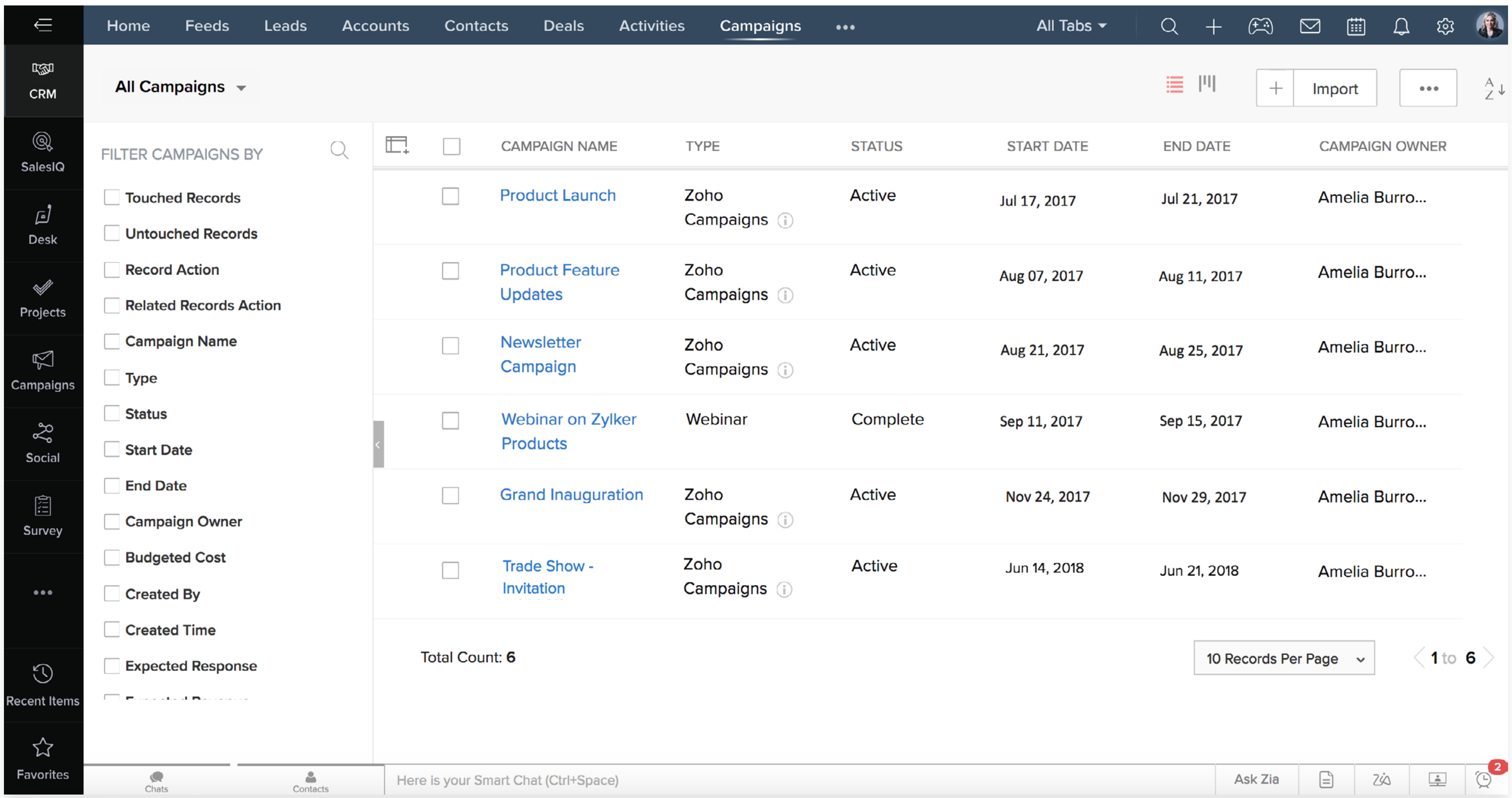
Get real-time insights into leads to build the right sales pitch and meet your leads' expectations.

The seamless flow of lead information between marketing and sales in Zoho CRM Plus enables Amelia to:

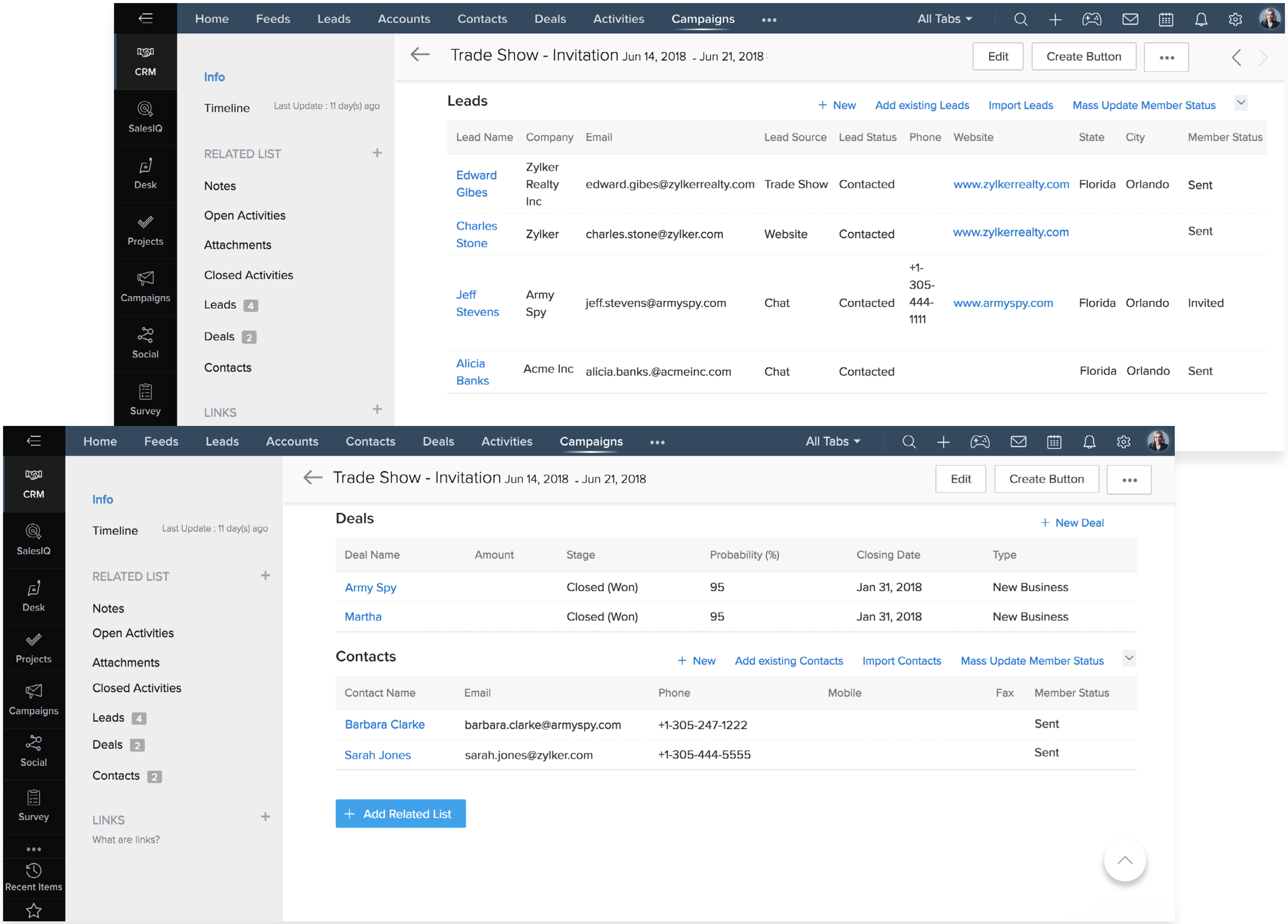
- Have up-to-date information on marketing activities. She can identify the source and channel through which Jeff contacted them, the list of email campaigns sent to Jeff, the activities he has shown interest in, his product preferences, and more.



- Track all recent interactions the marketing team has had with Jeff, emails and attachments, documents sent and shared, tasks completed, and much more through instant response tracking in CRM.
- View the list of email campaigns sent in Zoho CRM and identify the ones sent to Jeff.



- Identify leads, contacts, and deals associated with each email campaign. Amelia can check previous deals associated with Jeff or his company and the deals associated with particular campaigns.



- Establish better relationships with leads. For example, if Amelia finds that Jeff often visits a particular product website, she can mail him an ebook explaining the benefits of the product he's interested in so he has more details to make an informed purchase decision.

So Amelia now has information and useful insights about Jeff. This helps her gain adequate knowledge of her lead to develop new levels of engagement with him, build the right sales pitch, and have more informed conversations with him. She can respond to his queries promptly, send related collaterals, and progressively guide him through the buying process.

For instance, Amelia can send a personalized email inviting Jeff to attend a product demo. After he registers for the demo, she can send an email reminding him about the date and time and the topics being covered as the demo draws closer. Once it's over, she can request his feedback about the product through email. Based on his feedback, she can have further follow-ups, suggest the right product, and continue to guide him. She can then offer the best pricing and ultimately convince Jeff to buy the product.

Revitalize old leads and reengage them in the buying process.

When leads don't respond to email campaigns and remain idle for some time, Amelia can create filters to identify these leads in CRM and reengage them in the buying process by sending it to the marketing team for lead nurturing. For example, if Martha Hills, one of her prospects, has not responded to email campaigns sent by the marketing team, she can send Hills's details to them for lead nurturing. The marketing team can then send retargeting email campaigns to reengage the lead in the buying process.

So you can see how Zoho CRM Plus helps Amelia to communicate and collaborate better with her marketing teams and work cohesively to bring in more sales. It enables her to prioritize and follow up with leads that are more likely to result in a sale, build the right sales pitch, guide the leads through the buying process, and ultimately win more deals.

To learn more, go to

https://www.zoho.com/crm/crmplus/

Additional Resources

To learn more about email marketing with Zoho Campaigns, click
https://www.zoho.com/crm/help/zoho-campaigns/

For more information on working with email campaigns, see
https://www.zoho.com/crm/help/campaigns/

To learn how to integrate Zoho Campaigns with CRM, see
https://www.zoho.com/campaigns/help/integrations/zoho-apps.html#Integrate_Zoho_CRM

To see how to set up sync settings in Zoho Campaigns to automatically sync leads and contacts in CRM, map CRM fields, push leads or contacts in Zoho CRM, push campaign reports to CRM, and create campaigns and update email campaign status in Zoho CRM, see
https://www.zoho.com/campaigns/help/contacts/sync-with-zoho-crm.html

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