NUCLEUS RESEARCH

BIGIN BY ZOHO TO SHAKE UP SMB-CENTRIC CRM SPACE

ANALYST

Daniel Elman, Nick Grizzell

THE BOTTOM LINE

With few CRM solutions aiming to provide users with essential features at an affordable cost, Zoho created Bigin by Zoho to give small business owners access to sophisticated and functionally complete customer relationship management (CRM) technology. Zoho has centered Bigin on three qualities that are essential for small business users: ease of use, presence of essential features, and affordability. Compared to comparable small business-targeted CRM solutions from competing vendors, switching to Bigin could reduce CRM license spend per user by 64 percent on average.

BIGIN BY ZOHO

While searching for the correct CRM solution, many small business owners must sacrifice functionality for cost savings as many CRM solutions will lock essential features behind additional subscription costs. Recently, Zoho unveiled a new CRM solution that brings essential CRM functionalities to small businesses at an extremely affordable cost. Bigin by Zoho supplies users with a pipeline-centric CRM solution enabling small businesses to manage essential pipeline and contact information. Zoho created Bigin to combat the discrepancy in price models for small businesses and the CRM solution is built with a simplistic and pipeline-based design to allow for quick adoption within rapidly scaling companies. Bigin contains all the essential functionality needed to run a pipeline-centric sales organization. It includes marketing automation, analytics and customizable dashboards, process management, inventory management, integration, and team collaboration capabilities like visibility to sales activity for managers and the ability to manually assign leads (or automatically route them to a particular agent based on workflow triggers). Zoho has centered Bigin on three qualities that are essential for small business users: ease of use, essential features, and affordability. Furthermore, Bigin is supported on iOS and Android for mobile use offering the same simplicity and flexibility across all devices. Unlike many CRM applications which are primarily intended for viewing information within the CRM, Bigin allows users to update records or add notes from within the app. This is particularly important for traveling salespeople who are often on-the-go visiting accounts and require mobile access.

> **Switching to Bigin could reduce CRM license spend by 64 percent, on average**

With ease-of-use, Bigin aims to focus on a spreadsheet-like design allowing users to have a certain familiarity when transitioning to the new CRM solution. The sign-up and set up process takes less than 30 minutes and requires no training for new users saving companies invaluable amounts of time and money usually spent on training and configuration of a new solution. Contact information is organized with essential information about email addresses, work phone numbers, mobile phone numbers, and addresses. Additionally, Bigin provides an overview of currently open deals and activities between the company and the client along with a description of how long the customer has been connected with the company and all historical information relating to any correspondence with the contact. For sales, Bigin summarizes the number of total deals, open deals, and won or lost deals with metrics to measure how far along the deal currently is from qualification to value proposition and finally to closing.

For Bigin, Zoho also wants to focus on the right feature set to help small businesses fully understand customer operations. Bigin offers multiple pipelines using both a traditional list view and the popular kanban view (where deals are shown as tiles on a grid organized by pipeline stage), allowing users to create up to five different pipelines, accommodating the various common sales tactics like digital and inside sales which have different requirements, deal stages, and contacts. Many competing products do not allow the customer to customize their pipeline to fit the CRM to their unique sales processes; further, most don't support different types of pipelines. This means a different CRM system or instance (with different configuration) is needed to support the different sales groups. Looking at the sales pipeline,

Bigin enables users to create and embed web forms for lead capture with drag-and-drop format, no coding required. This allows the CRM to be dynamically updated as it's used, and lends well to leveraging automation capabilities as the completion of a form can trigger an action for the assigned sales agent. Telephony is a built-in feature providing automatic call logging, one-click calling, and full integration of a PBX vendor from the Zoho PhoneBridge Marketplace. Bigin streamlines workflow processes with callable triggers for emails, tasks, and updated fields. For closing deals, sales teams can use out-of-the-box visualization tools and dashboards to create charts and graphs highlighting KPI metrics. Additionally, Bigin offers full integration with Office 365, Zapier, Google, and a variety of Zoho applications.

Zoho successfully created an affordable CRM solution for small business owners without locking essential features behind an additional charge. With over 250 companies already having deployed Bigin by Zoho, the solution is already to enabling small businesses with increased sales team productivity, enhanced customer visibility, and streamlined business operations with little to no training required. Particularly given the current fiscal climate where companies are looking critically at the value delivered by their IT investments, companies that succeed need to deliver value-add technology that is simple to maintain and quick to deploy. Bigin stands out as the most affordable CRM solution for small businesses when compared to SMB-focused CRM products from competitors such as Salesforce, Insightly, Pipedrive, and Copper.

LOOKING AHEAD

With the current economic climate causing companies to pause or rethink their IT spends, the timing is perfect for Zoho to announce Bigin. It caters smaller businesses, precisely the customer demographic that is disproportionately being affected by the shutdown orders. As a long-term strategy to fuel future growth, attracting customers as they are small and

growing with them is a profitable strategy for Zoho to achieve long-term growth while continuing to deliver positive outcomes and driving the growth of Bigin customers. As a component within the Zoho ecosystem, it serves as an easy introduction to Zoho technology; as more business becomes digitized and the company users become more familiar with the system, additional processes and departments can adopt Zoho technology. This positions Bigin by Zoho as a strong pipeline-builder for Zoho One, the full platform of over 45 Zoho applications that customers can activate as needed.