

# Become a smarter sales rep with Zoho CRM



# Here is how you can work smart.

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# Become a smart sales rep with Zoho CRM

At some point in our lives we have all dreamed of possessing superpowers to do extraordinary things, just like our favorite superheroes. We'd love to fly over the traffic to our workplace, multitask in a jiffy and close deals in a snap – in short, we'd love to be that smart sales rep at our workplace! But wait, you don't have to be born in Krypton, be bitten by a radioactive spider, or possess hi-tech gadgets to do all that. Like Mjolnir is for Thor, your reliable tool is a good CRM system that's flexible and does most of the sales automation, leaving you to just focus on customer interaction and closing deals.

In this ebook, familiarize yourself with features of Zoho CRM that could help you become that smart sales rep at your workplace who is always one step ahead of the rest.

## Get instantly notified about important customer emails

You're at work on a beautiful Monday morning, quickly running through all your emails and replying to the ones that are most important. By noon, you find out that you had missed out on reading an important email from a hot prospect. The reason? Your inbox is cluttered with business emails, personal emails and other pesky, irrelevant emails!

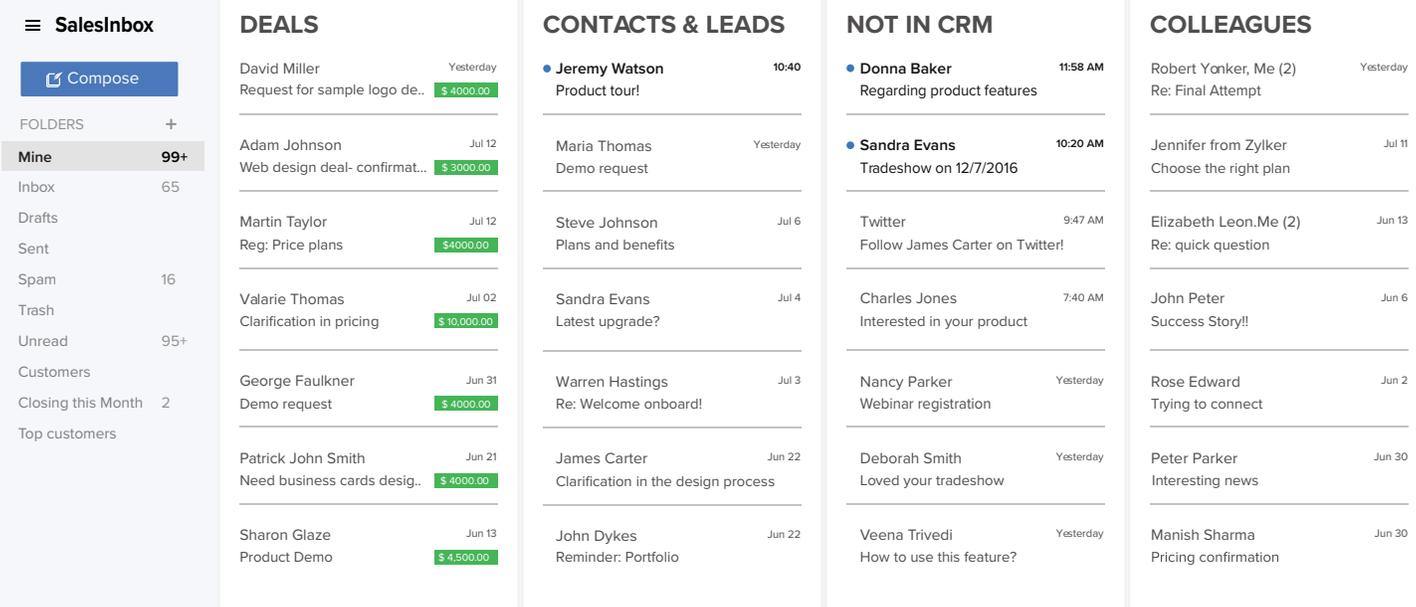
The rule of thumb to be a smart sales rep is to attend to your prospects as soon as you can and for that, you need a filtered view of your prospects' emails alone. With Mail Magnet, you'd not only receive emails within Zoho CRM but also get a filtered view of your prospects' emails. The best part of this integration is that you don't need to keep checking your emails all the time. Each time you receive an email from a prospect, you're notified by the mail icon that pops up right on the Zoho CRM home page.



MailMagnet will be available only if you enable the Zoho Mail Integration and configure your email account within Zoho CRM. Make sure you do that.

## Think within your (in)box

When it comes to sales, the most recent email isn't always the most important. When a prospect is sending you an email asking about the pricing of a particular product, that email needs to be in a place where you can immediately access it. That will save you a lot of time and effort. You already organize and prioritize your sales activities according to your pipeline and the stage each deal is in. Now you can organize your emails the same way too. Make sure you don't miss out on that crucial email from your prospect who is asking you for the price of a particular product, just because it got stuck in a pile of junk and irrelevant emails.



**SalesInbox**

Compose

FOLDERS +

- Mine 99+
- Inbox 65
- Drafts
- Sent
- Spam 16
- Trash
- Unread 95+
- Customers
- Closing this Month 2
- Top customers

DEALS	CONTACTS & LEADS	NOT IN CRM	COLLEAGUES
David Miller Request for sample logo de... Yesterday \$ 4,000.00	Jeremy Watson Product tour! 10:40	Donna Baker Regarding product features 11:58 AM	Robert Yonker, Me (2) Re: Final Attempt Yesterday
Adam Johnson Web design deal- confirmat... Jul 12 \$ 3,000.00	Maria Thomas Demo request Yesterday	Sandra Evans Tradeshaw on 12/7/2016 10:20 AM	Jennifer from Zylker Choose the right plan Jul 11
Martin Taylor Reg: Price plans Jul 12 \$ 4,000.00	Steve Johnson Plans and benefits Jul 6	Twitter Follow James Carter on Twitter! 9:47 AM	Elizabeth Leon.Me (2) Re: quick question Jun 13
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George Faulkner Demo request Jun 31 \$ 4,000.00	Warren Hastings Re: Welcome onboard! Jul 3	Nancy Parker Webinar registration Yesterday	Rose Edward Trying to connect Jun 2
Patrick John Smith Need business cards desig... Jun 21 \$ 4,000.00	James Carter Clarification in the design process Jun 22	Deborah Smith Loved your tradeshow Yesterday	Peter Parker Interesting news Jun 30
Sharon Glaze Product Demo Jun 13 \$ 4,500.00	John Dykes Reminder: Portfolio Jun 22	Veena Trivedi How to use this feature? Yesterday	Manish Sharma Pricing confirmation Jun 30

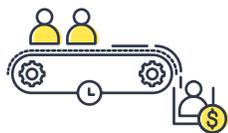
SalesInbox has columns, folders and filters that reflect your sales priorities and let you stay on top of the emails that matter the most to you, not the ones that are on top in your inbox. It does this by intelligently organizing your emails according to how you've set up your CRM.

For instance, emails from your leads and contacts go to the **Leads & Contacts** column, emails from your peers go to the **Colleagues** column and emails from potential prospects go straight to the **Deals** column.

While regular email clients let you filter emails based on the sender's address, who's been CC'd, etc., SalesInbox lets you filter emails based on both the sender's email address and sales parameters. For instance, emails from customers who are giving you deals worth more than 50,000

USD can be categorized in a folder named “Top Customers.” SalesInbox also creates dynamic folders for “**Closing This Month**,” “**Customers**,” and “**Deals**,” and shows them right alongside the folders you already have.

With SalesInbox, you can also:



## Automate lead creation in your inbox

When people show interest in your product or business, set up triggers to automatically categorize new messages as leads. For instance, when you receive an email from an address that is not in your CRM, you can create certain conditions, which, when met, will execute a workflow rule to convert that email address to a lead.



## Get automatic reminders

Create automated alerts to remind you to respond to your emails on time. Say you’ve sent an email to a contact, and they haven’t responded for a couple of weeks. SalesInbox has ResponseWatch, which lets you assign a due date for when you should hear back from a lead or contact. ResponseWatch monitors your inbox, and if you don’t hear back within a certain deadline, it alerts you to follow up again. When you don’t let your emails go unanswered, you’re on your way to being a sales superhero.



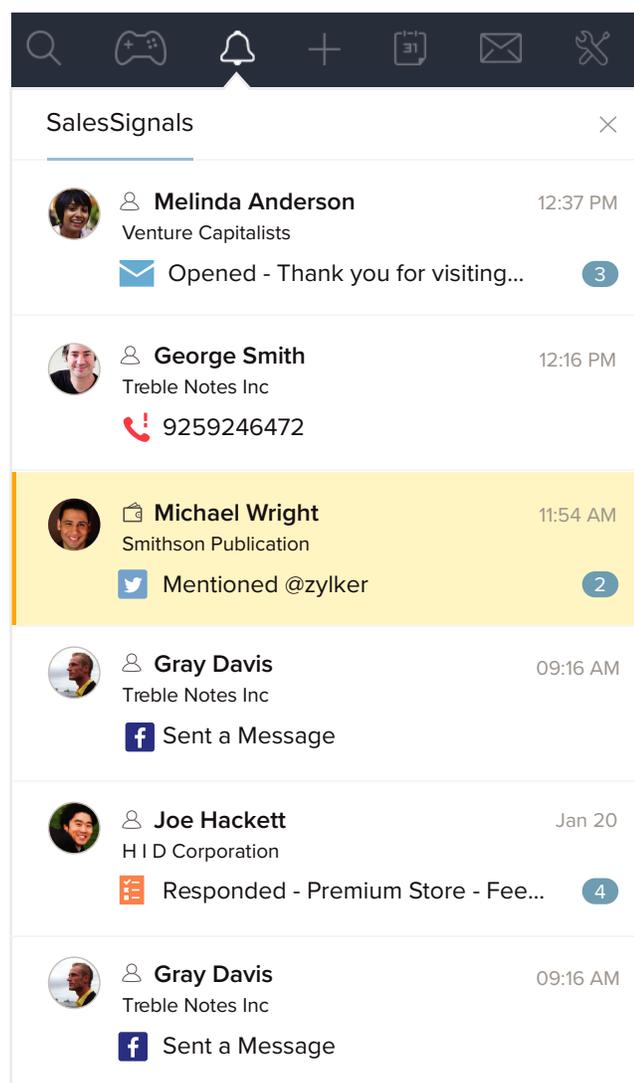
## Work with contextual information

Whenever you email contacts, you should also be aware of how they’ve progressed through the sales cycle. Contextual information in SalesInbox lets you scan all your notes, tasks, and previous messages, so you can pick up from where you left off. When you have the right context, you will know how valuable each prospect is, who deserves more attention, and when the next deal is closing.

## Get the pulse of your customers

For a sales rep, timing is critical to sales success. SalesSignals gives you instant notifications about what your prospects are up to. Has the prospect that you've been chasing all week opened your email? You will get an alert as soon as that email has been opened.

Prospects and customers can reach out to you across various channels, from visiting your website to filling up surveys, raising support tickets and posting on social media. SalesSignals lets you keep track of all customer activities, by displaying them in an organized timeline.



### SalesSignals will be displayed:

- When emails are received from leads, contacts, or potential customers.
  - When a lead, contact, or potential customer opens an email sent from or clicks a link in the email, or when the email has bounced. The status of the email can be **Opened, Clicked, or Bounced**.
  - When missed calls are received from leads, contacts, or potential customers.
  - When survey responses are received from leads, contacts, or potential customers.
  - When you get new support tickets, comments, or responses from leads, contacts, potential customers, or customers.
  - When you receive missed chats from leads, contacts, or potential customers.
- You will also receive SalesSignals notifications for support tickets that are overdue or escalated, or when a customer gives a new rating to a support agent.

## Convert social media conversations into actionable leads

It is important for you to know what interests your prospects, what kind of products or services they are looking for and what their likes and dislikes are. Your potential customers use social media and post regular updates on Facebook, Twitter and Google+. Some of them also talk about the products they are using, who their main influencers in decision making are, and which product or service they want to use.



As a smart sales rep, you need to convert the likes, shares, comments and retweets from your prospects into quantifiable assets.

Convert the social media conversations into actionable leads by automating the lead generation process, through a workflow.

Configure your social channel, sit back and relax.

### Every like, share and retweet gets added as a contact

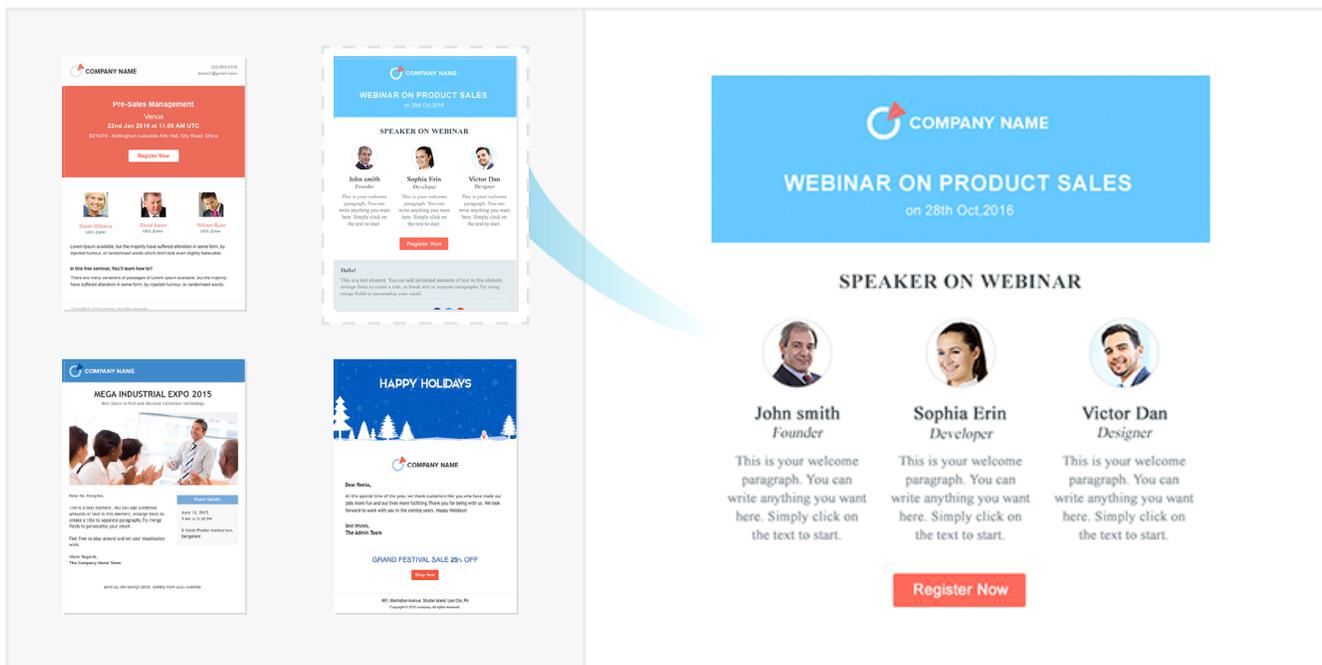
- When someone makes an @mention of your organization, replies to your tweets or messages, likes your page or retweets a message, you can add that person as a lead and assign the lead to a particular sales rep.
- When someone messages you on social media or comments on one of your posts, you can add that person as a contact and assign that contact to another sales rep.

**You need to have the Social Admin Profile permission to set up the automation rules.**

# Personalize your communication with multiple leads

You love your job, but also dread the ‘manual data entry’ that comes along with it. You spend the entire day typing thank you emails, welcome emails, reminder emails and introduction emails, leaving you very little time to do what you are hired for, selling!

Email Templates in Zoho CRM help you get rid of this. Just personalize emails for each activity and send them to individual prospects, or send mass emails to a list of leads. Say, you’ve imported leads from a trade show and you want to send them a thank you email. All you need to do is select the list of leads and blast out a mass email.



## You can also customize templates by:



Designing your own templates by dragging and dropping text, images, tables and buttons. Make your templates more attractive by choosing your own layouts for your text and adding background colors to your template.



Merging fields to your template. Use a hashtag which will give you a drop-down menu with a list of all the available merge fields.



Adding headers and footers to the templates. Just click on the location where you want the headers and footers to be, and type away!

# Know how your emails have performed

You can't send better emails if you don't know how they've performed. A smart sales rep needs to consistently send engaging emails which don't just grab the attention of prospects, but also get them to read and respond to them.

When you get smart insights on how your templates are performing, you get closer to writing more engaging content.

The screenshot shows the 'Email Analytics' dashboard in Zoho CRM. At the top, there is a navigation bar with options like Home, Projects, Leads, Contact, Potentials, Accounts, Activities, and Reports. Below the navigation bar, there are filters for 'Summarize ByG' (set to Date), 'Group By' (set to DayL), and 'Date Range' (set to Last 7 Days). There are also buttons for 'Export to PDF' and 'Duplicate'. The main content area is divided into two sections: a 'Summary Report' and a 'Summary Report' (likely a detailed view). The first summary report shows overall statistics for sent, bounce, opened, clicked, received, and responded emails. The second summary report shows a detailed view of these statistics broken down by date.

SENT	BOUNCE		OPENED		CLICKED		RECEIVED	RESPONDED
63897	3.65%	2331	29.3%	18665	4.60%	2491	18665	987

DATE	SENT	BOUNCE		OPENED		CLICKED		RECEIVED	RESPONDED
11/07/2016	2173	3.45%	75	21%	450	2.71%	48	5165	91
10/07/2016	6914	3.57%	247	22.03%	1517	3.18%	191	6313	15
09/07/2016	6305	3.73%	235	23.06%	1454	3.5%	192	5765	-
08/07/2016	8762	3.73%	327	30.07%	2597	5.12%	317	11237	382

Email insights will give you daily, weekly, or monthly reports on the open, click, and bounce rates of your emails. Dashboards will tell you which of your email templates have the best open and click rates. You can use the templates with the highest open rates, update the existing content or create new templates altogether.

If the latest template you've sent has the highest click rates, your job is done!

## Go Mobile. Carry Zoho CRM in your pocket

To all the field sales reps, here's another handy tool. We know you work pretty much round the clock, attending many customer meetings, conferences and events. But you can't always carry bulky laptops to update your activities and keep your team in sync with the latest happenings, can you? You need a CRM system that you can carry in your pocket. And Zoho CRM for Mobile gives you just that. From adding leads to creating tasks, receiving email notifications to finding customers nearby, the Zoho CRM Mobile App has it all.



### Know who is nearby

Locate all the prospects near you, wherever you go. Use the Map View in the Zoho CRM Mobile App and locate the leads, contacts and prospects in your area, and schedule meetings during your next business trip. Find out where your leads are located and figure out the best time to contact them.



### Track your meetings

Whether you're going to the movies or eating out at your favorite restaurant, you like to check-in to that location and share it on Facebook or Twitter.

Keep your colleagues in the loop about who you have visited by checking-in at your customer's location.

When you log all your visits, your teammates know where you've been and customer visits won't be duplicated.

Your check-in also gets recorded as a note associated to that particular lead or contact.

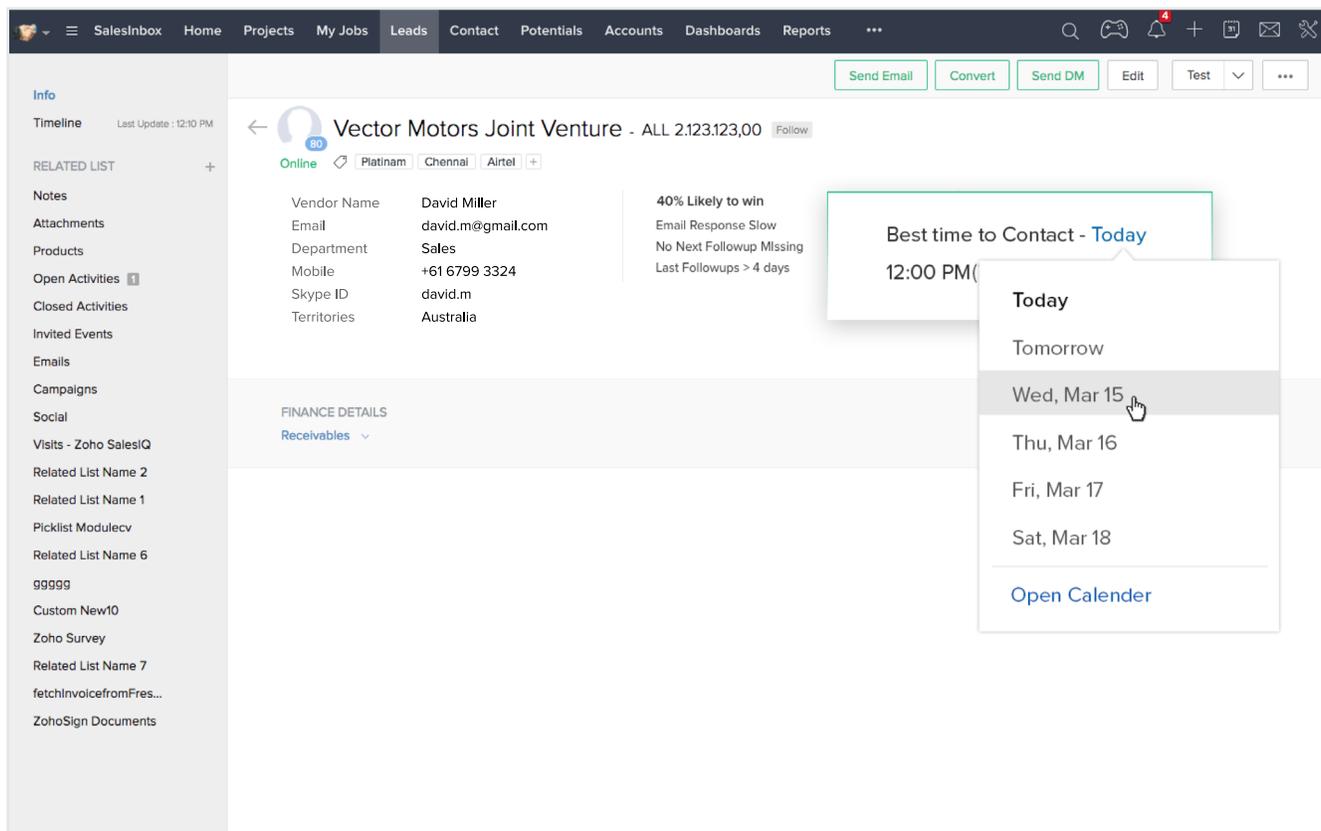


### Give voice to your thoughts

Do you want to record your conclusions about a recent demo you gave to a prospect or record your thoughts about your meeting with a customer? You don't have to type out lengthy notes. Record voice notes when you're walking or driving, associate these audio files with your records and download them for your reference whenever you need them.

## Get your timing right

Don't let multiple calls and emails to your leads go unanswered. Use a smarter approach. Zia, an Artificial Intelligence (AI) powered sales assistant, will show you notifications that let you know if leads, prospects and customers have opened and replied to your emails, participated in your surveys or posted on social media. Based on this information, you will know the best time to contact each prospect or customer. When you know the best time to contact your customers, you get more replies from them, at the right time.



The screenshot displays the Zoho CRM interface for a lead named "Vector Motors Joint Venture". The lead's status is "Online" and they are located in "Chennai". The interface shows a "Best time to Contact - Today" notification at 12:00 PM. A dropdown menu is open, showing options for "Today", "Tomorrow", "Wed, Mar 15", "Thu, Mar 16", "Fri, Mar 17", and "Sat, Mar 18". The "Wed, Mar 15" option is selected. The interface also shows a "40% Likely to win" status and a "FINANCE DETAILS" section for "Receivables".

## Automate your routine actions

You follow a definite set of actions when it comes to contacting leads. Let's say, for instance, that you have to contact 50 leads in a day. You have already spoken to 30 of them but the other 20 calls and emails have gone unanswered. You leave a voice message for those leads and update your tasks. But you don't want to manually follow the same routine time and time again, do you? Automate these actions through macros. All you need to do is select the records (leads/prospects) and run the macro, which will automatically take care of all your repetitive tasks.



### Did you know?

Zoho CRM, knowing that a large part of your day consists of this regular set of actions, will automatically prompt you with a suggestion to run a macro.

Let's say you have called a lead, sent that lead a followup email and then created a task. Zia will suggest the same list of actions as a macro the next time. All you need to do is run the macro if it suits your need.

Automate your frequent actions using Macros ✕

We've Listed the mass actions that you've frequently performed. You can save them as Macros to automate these actions. [Learn More About Macros](#)

**5 times in a week**

Sent Mail	Demo Invite Mail
Field Update	Lead Status - Contacted
Task	Sales Call with Decision Maker, Meeting with Client Manage r

**5 times in a week**

Sent Mail	Sales Followup
Field Update	Region - APAC

**2 times in a week**

Sent Mail	Interop 2016 - Invitation
Task	Sales follow up call, Webinar on new product

# The CRM View for your activities

Your work day is typically loaded with events and activities. These activities could be anything, from visiting a prospect, showing them a demo, creating a task to call a prospect or following up with customers after they have visited your website.

How do you know which task you should take up first?

Available for tasks, calls, and events in the Activities module, the CRM View for Activities lets you clearly prioritize your activities. The interface uses a kanban view, which lets you plan who you should be following up with that day.

## The CRM View is split into four categories:

- **Customers**, which lists all the tasks, calls and events associated to customers. (Deals Won and Deals Closed)
- **Open Deals**, which lists all tasks, calls and events associated to deals in the pipeline.

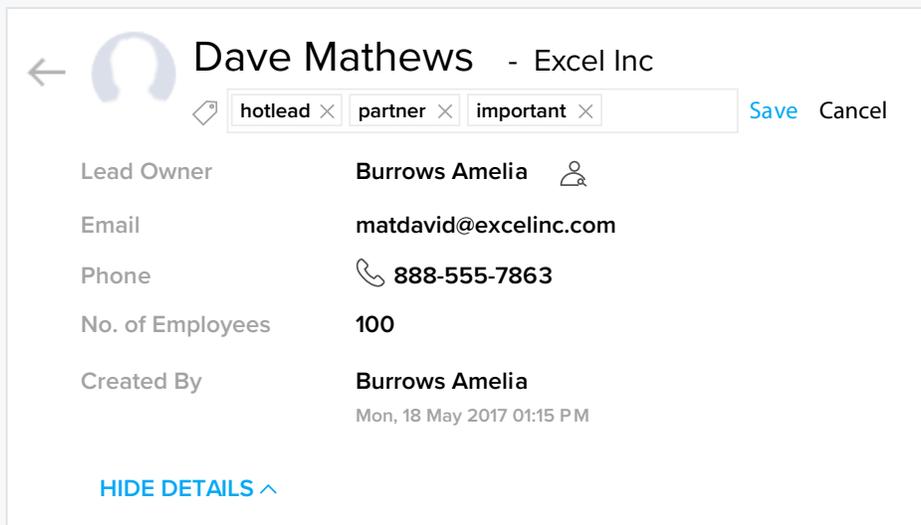
DEALS	CONTACTS & LEADS	NOT IN CRM	COLLEAGUES
David Miller <span style="float: right;">Yesterday</span> Request for sample logo de.. <span style="float: right; color: green;">\$ 4000.00</span>	● <b>Jeremy Watson</b> <span style="float: right;">10:40</span> Product tour!	● <b>Donna Baker</b> <span style="float: right;">11:58 AM</span> Regarding product features	Robert Yonker, Me (2) <span style="float: right;">Yesterday</span> Re: Final Attempt
Adam Johnson <span style="float: right;">Jul 12</span> Web design deal- confirmat... <span style="float: right; color: green;">\$ 3000.00</span>	Maria Thomas <span style="float: right;">Yesterday</span> Demo request	● <b>Sandra Evans</b> <span style="float: right;">10:20 AM</span> Tradeshaw on 12/7/2016	Jennifer from Zylker <span style="float: right;">Jul 11</span> Choose the right plan
Martin Taylor <span style="float: right;">Jul 12</span> Reg: Price plans <span style="float: right; color: green;">\$ 4000.00</span>	Steve Johnson <span style="float: right;">Jul 6</span> Plans and benefits	Twitter <span style="float: right;">9:47 AM</span> Follow James Carter on Twitter!	Elizabeth Leon.Me (2) <span style="float: right;">Jun 13</span> Re: quick question
Valarie Thomas <span style="float: right;">Jul 02</span> Clarification in pricing <span style="float: right; color: green;">\$ 10,000.00</span>	Sandra Evans <span style="float: right;">Jul 4</span> Latest upgrade?	Charles Jones <span style="float: right;">7:40 AM</span> Interested in your product	Manish Sharma <span style="float: right;">Jun 6</span> New contact?
George Faulkner <span style="float: right;">Jun 31</span> Demo request <span style="float: right; color: green;">\$ 4000.00</span>	Warren Hastings <span style="float: right;">Jul 3</span> Re: Welcome onboard!	Nancy Parker <span style="float: right;">Yesterday</span> Webinar registration	Rose Edward <span style="float: right;">Jun 2</span> Trying to connect
Patrick John Smith <span style="float: right;">Jun 21</span> Need business cards desig.. <span style="float: right; color: green;">\$ 4000.00</span>	James Carter <span style="float: right;">Jun 22</span> Clarification in the design process	Deborah Smith <span style="float: right;">Yesterday</span> Loved your tradeshaw	Elizabeth Leon.Me (2) <span style="float: right;">Jun 30</span> Re: quick question
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- **Leads/Contacts**, which lists out the tasks, calls and events associated to leads and contacts.
- **Others**, which lists tasks, calls and events associated to records other than leads and contacts, open deals and customers.

## Prioritize with tags

You need unique identifiers associated to your CRM records that help you search, sort, categorize, filter, and segment records more effectively. Tags let you clearly prioritize your records and contact them.

Say you have a few leads in your account that need to be given high priority. You can tag those leads as Important, and filter them easily from other leads in your CRM account.



The screenshot shows a Zoho CRM record for "Dave Mathews - Excel Inc". At the top, there is a back arrow, a profile icon, and the name "Dave Mathews - Excel Inc". Below this, there is a tag input field containing three tags: "hotlead", "partner", and "important", each with a close button (X). To the right of the tags are "Save" and "Cancel" buttons. The record details are listed below:

Lead Owner	Burrows Amelia 
Email	matdavid@excelinc.com
Phone	 888-555-7863
No. of Employees	100
Created By	Burrows Amelia Mon, 18 May 2017 01:15 PM

At the bottom left, there is a "HIDE DETAILS ^" link.

### Here are a few additional ways you can tag your records:

- Tag your records based on the relationship they have with your business. For example, your record could be a lead, vendor, or partner. Categorize these records using multiple tags, and filter them wherever required.
- You can also create tags based on demographics, such as location, revenue, or company size. You can add tags such as US, UK, Australia, or Asia. Tags could also be size 100-150, million-dollar, small scale, enterprise, and more.

- You may capture leads from different business organizations , trade shows, have a database of contacts, or capture leads/contacts from your website. All you have to do is tag them as, trade shows leads, website leads, etc..
- You want to contact leads through email or phone or even based on the best time to contact them. Based on your criteria, tag them as contact via email, contact via phone, contact evening, and so on.
- When you run a business with multiple product lines, a lead or contact may be interested in just a few products, or every product you offer. You can segment your records based on the product they are interested in.
- Create tags based on different stages of a lead in your CRM. This makes it easier to segment those leads and communicate better with them, depending on the stage of that lead.

***Use these powerful features that Zoho CRM offers and watch your productivity soar, sky high!***

# Contact Us

## USA

- **California**  
Zoho Corporation  
4141 Hacienda Drive, Pleasanton,  
California 94588, USA  
Phone : +1 877 834 4428 | +1 615 671 9025
- **Austin**  
Zoho Corporation  
3910 S, IH 35, Suite 100, Austin,  
Texas 78704, USA

## INDIA

- **Chennai**  
Zoho Corporation Pvt. Ltd.,  
Estancia IT Park, Plot No. 140 & 151, GST Road,  
Vallancherry Village, Chengalpattu Taluk,  
Kanchipuram District 603 202, INDIA  
Phone : +91 (44) 71817070 | +91 (44) 71817000  
+91 (44) 67447000
- **Tenkasi**  
Zoho Technologies Pvt. Ltd.,  
Silaraipuravu Village, Mathalamparai,  
Tenkasi, Tirunelveli District 627 814, INDIA

## Zoho CRM Resources

[www.zoho.com/crm/resources](http://www.zoho.com/crm/resources)

