Getting Your Sales Reps to Love CRM

Zoho CRM

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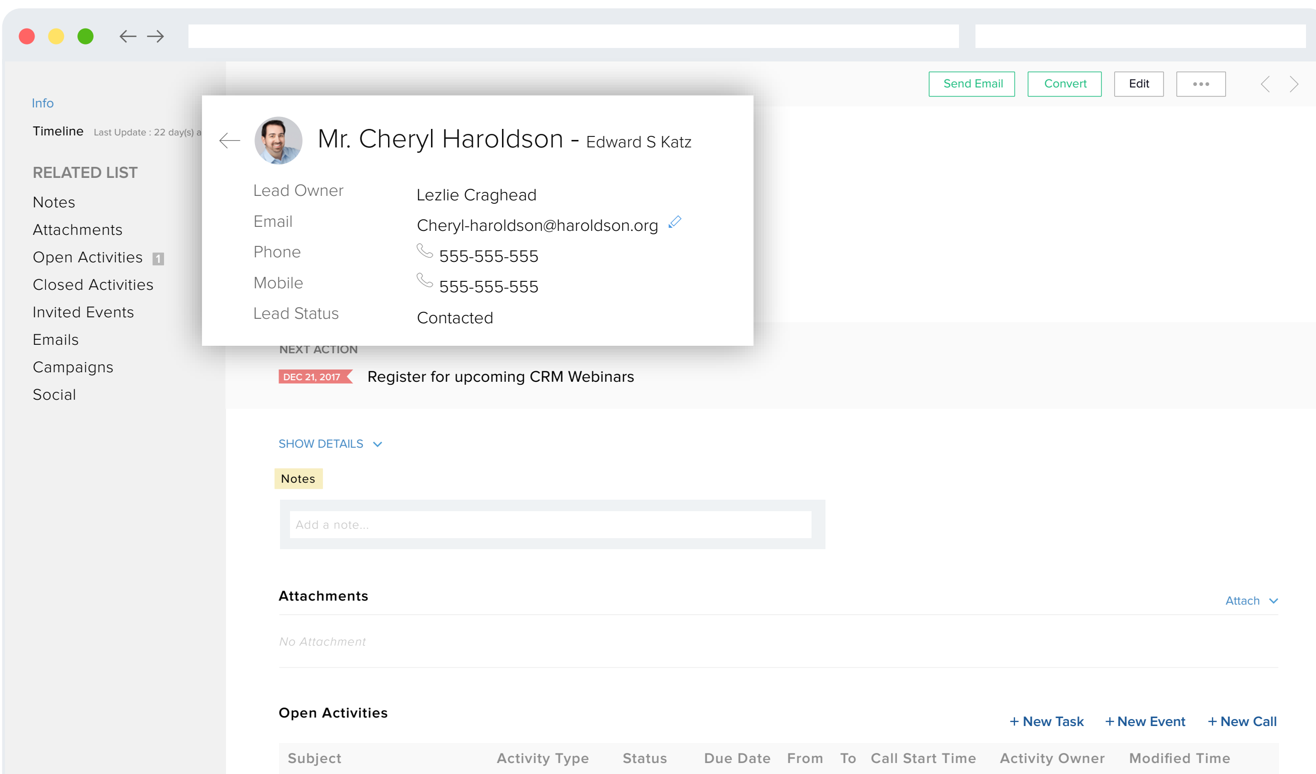
Ways to Make Your Sales Reps Love Their CRM

Most sales reps are not fond of using CRM software. They have to enter data manually and spend countless hours doing reports. They claim that the CRM isn't user-friendly. According to **CSO Insights** research, a CRM is not about helping salespeople but only to show the sales pipeline and activities. However, the CRM systems have a ton of features which is quite beneficial to the salespeople. The question is how can you implement and manage your CRM system to get your sales reps to love it and adopt it? Here are some suggestions.

Introduce contextual information

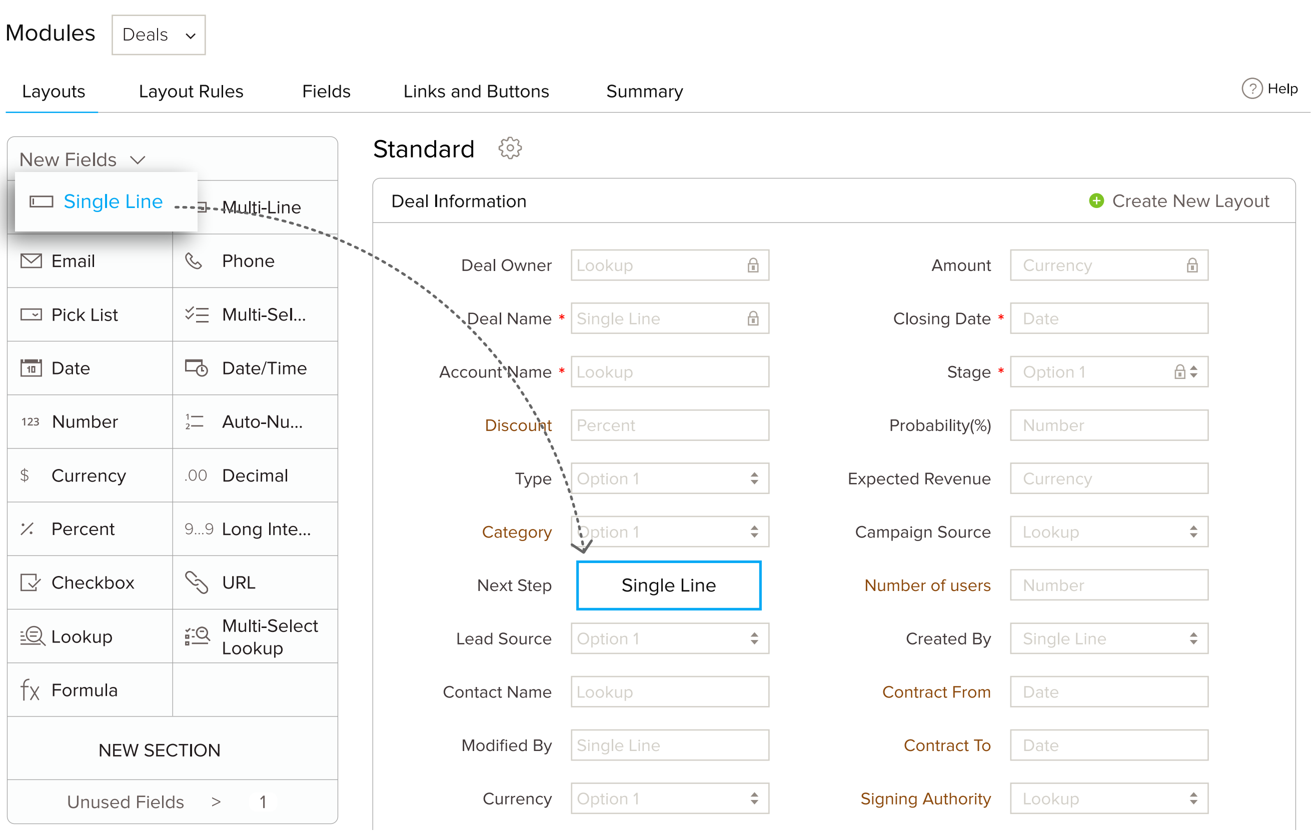


There are a lot of modules in Zoho CRM that contain information about a particular customer (e.g.Activities, Deals, Quotes, Invoices). Most reps go back and forth between these modules on a daily basis while working with prospects. What if you make it easier for them by introducing Related Lists?

With Related Lists, your sales reps can view all of the records associated with a parent record. In other words, all the tasks, deals, events, products, invoices, etc. are displayed in the contact information of the customer's record in Zoho CRM. That way, they don't need to navigate to different modules to view the related data. In addition, all the related lists contain an option to create a new record in that particular module and associate it with the parent record.

Say, for instance, you are currently viewing a record in the Accounts module and you strike a deal with them. **Click +New Deal** button in the related lists section for deals to create a record in the Deals module and automatically associates it with the record in the Accounts module. There are lots of places where information about a customer can be found. For example, Social media, spreadsheets, text files, mobile notes, etc. Zoho CRM provides an option to integrate social media, emails, and notes. As a result, all information about a lead or customer is in one place.

Cut the clutter



Do not display modules not in use

Zoho CRM contains lots of features targeted at helping all businesses. Therefore, some modules are not necessary for every user. By setting up Profiles and Roles for your users, you not only define a structure for your company but also remove unwanted modules to ensure that sales reps have the information they need without having to search for it.

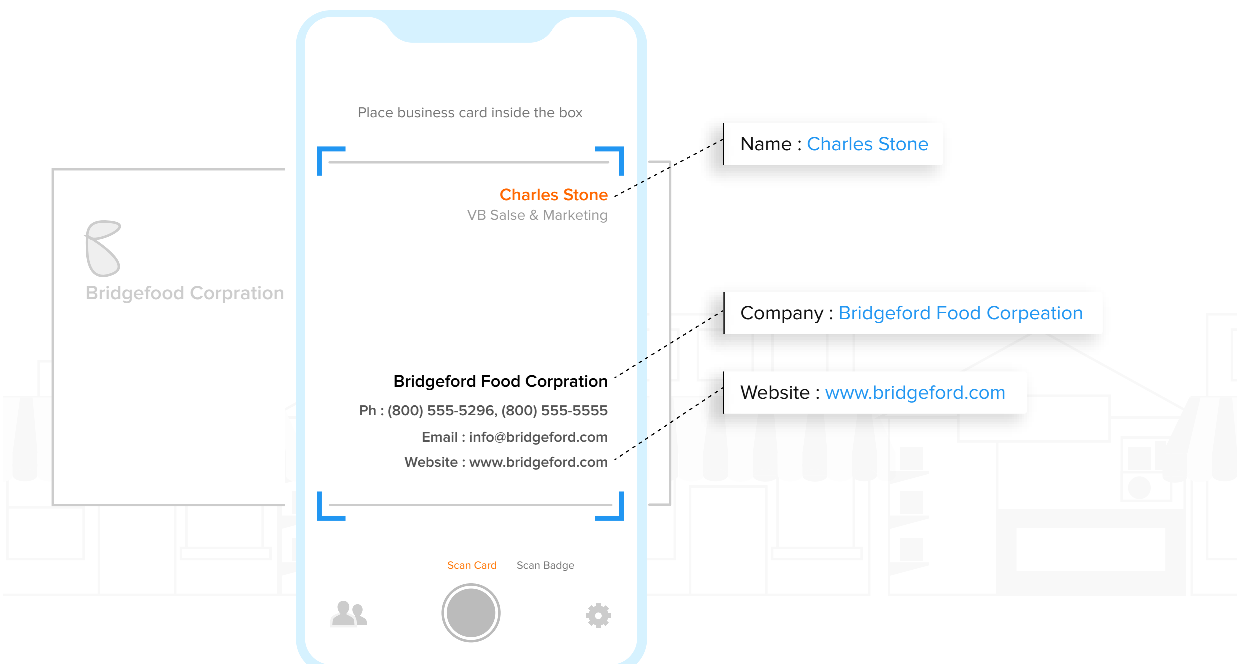
Roles help you form the hierarchy of your organization and Profile lets you determine the level of permission a user can have. Setting up Profiles gives you the means to reduce the amount of unnecessary information that a sales rep sees.

Stick to gathering only the relevant information

Most CRM applications have lots of fields to store data. However, in day-to-day use, most of the fields are left untouched. Seeing a lot of empty fields makes it look like the sales rep doesn't have enough information. But that is usually not the case. Use Layouts to remove those unwanted fields, and make your Zoho CRM database look more concise and complete.

Conditional Layout Rules is another feature in Zoho CRM where the fields show up only after particular criteria is fulfilled. For instance, in a real estate company, the information you want to get from the customer differs depending on whether the requirement is an apartment, individual home, or a villa.

Give them the benefit of going mobile

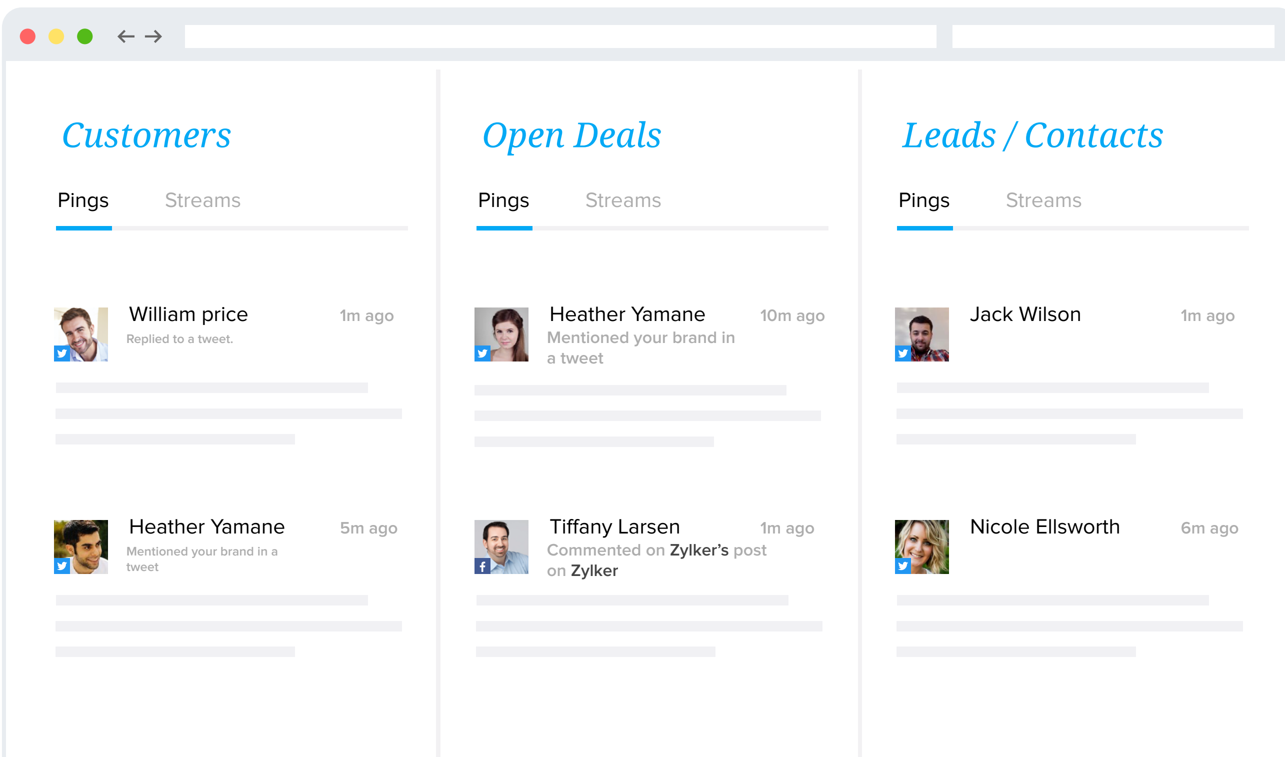


A CRM mobile app gives you an edge in customer acquisition. For instance, a sales rep from your company attends a trade show. They return with a bunch of business cards. Instead of having to manually create leads, your reps can quickly add them with a mobile CRM app.

Zoho's iPhone apps like Leads or Card Scanner let you instantly capture the attendee's information into the CRM database. This saves your reps a lot of time, and they can even follow up right from the CRM Mobile app. Use the app to set up a workflow to send an automated email to a lead.

Bring social media into CRM

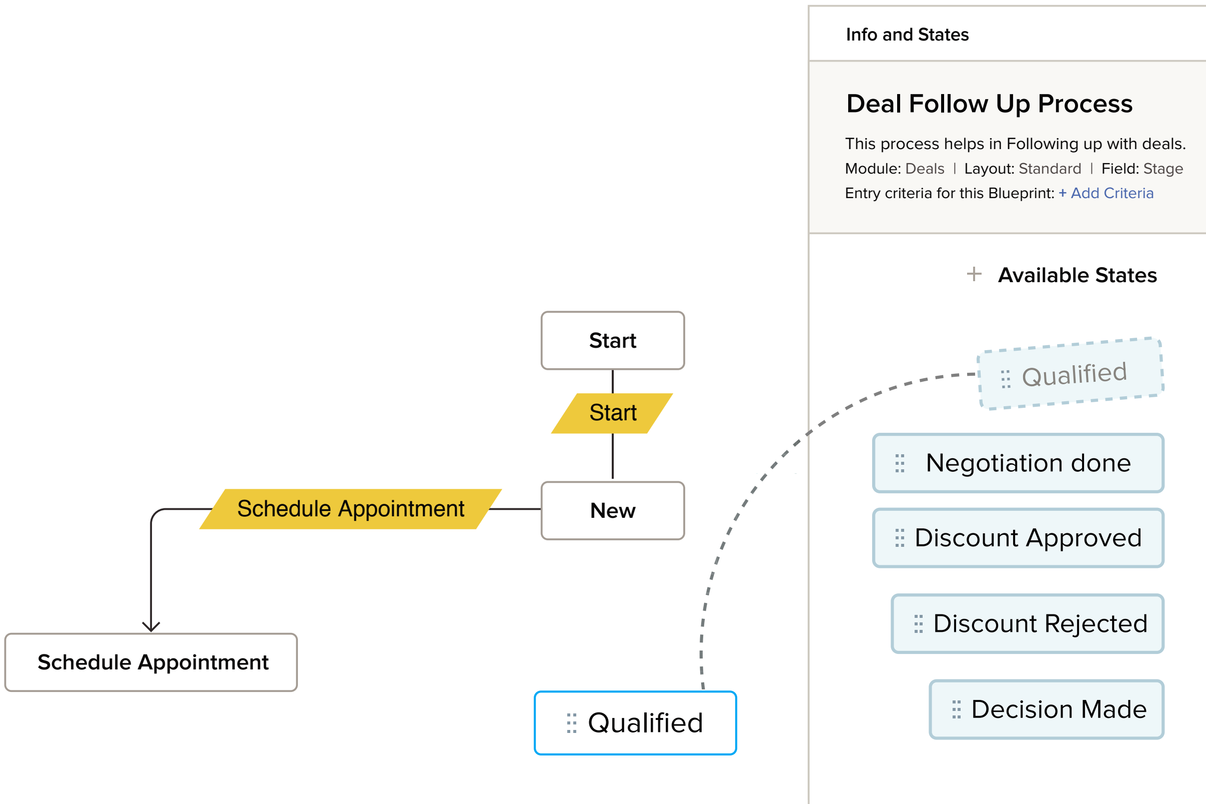
A sales rep can make a stronger pitch to a prospect or advance a lead to the next stage if they have a clear idea of the potential customer's personality. But whats the best way to get that information? From socialmedia, obviously. Sales people can peruse the profiles of their leads to get a sense oft their requirements.



The social media integration in Zoho CRM allows a sales rep to find a customer's social media profile, without having to open up new tabs and search for it manually. Furthermore, responses from a company's representative would make customers feel that the company takes care and effort to address their requirements.

Automate work

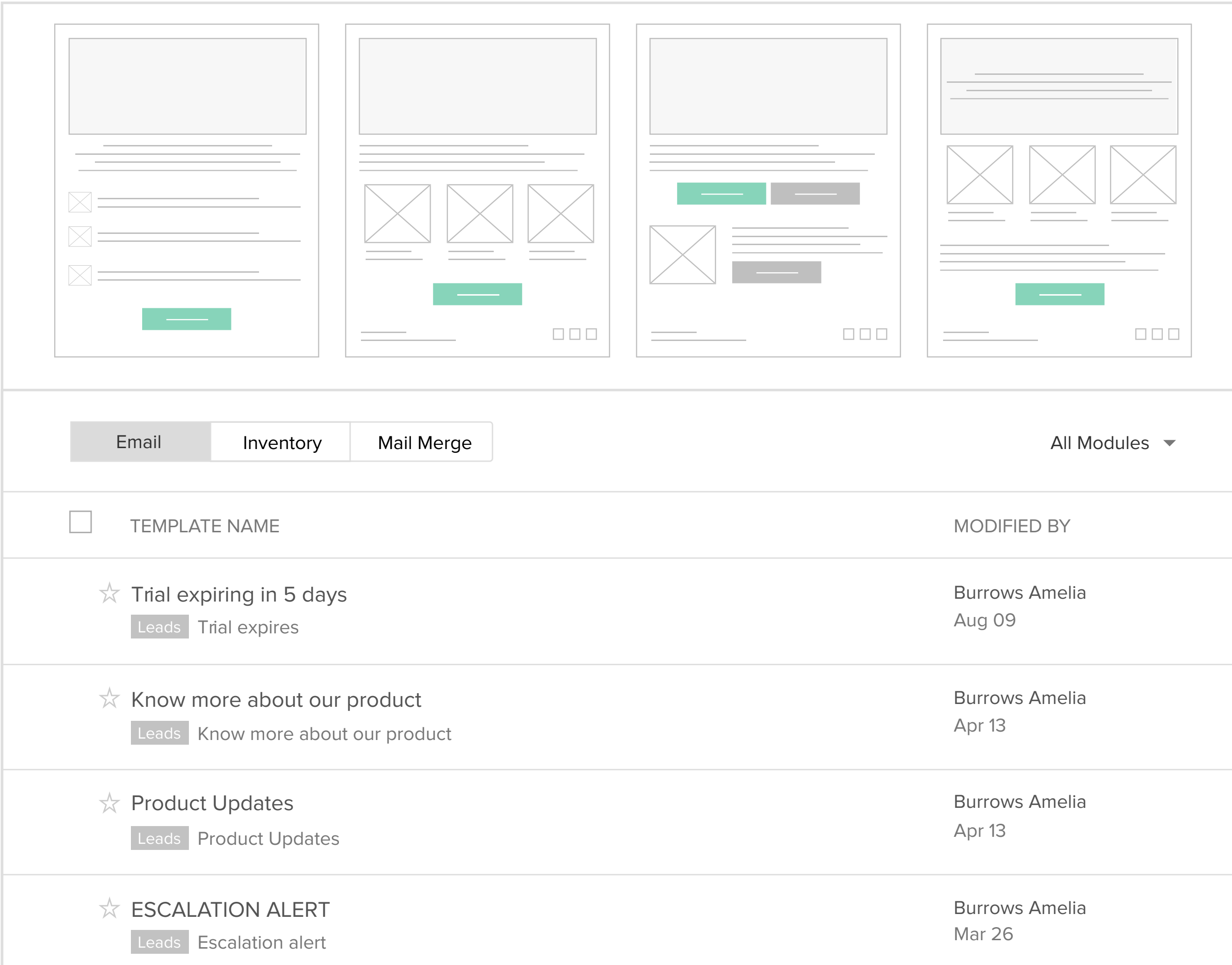
Configure **Workflow Rules** to make Zoho CRM work the way you do. A typical sales workflow, for example, involves these steps: acquire leads, send emails, convert leads into deals, negotiate, and close the deal. Automate this process to reduce the mundane and repetitive work for your sales reps.



For instance, if the deal advances to the next stage in your sales process, create a follow-up task for the Deal Owner, stating that they must add a note in that record summarizing the main takeaways of their conversation with the prospect.

Of course, you can set up workflows to send an email, create tasks, update a field, trigger a webhook, etc. Additionally, you can also schedule the action to occur at a later time. For instance, to create a task reminding the sales rep to send a follow-up email after a field in the deal record is modified.

Suggest templates and Macros

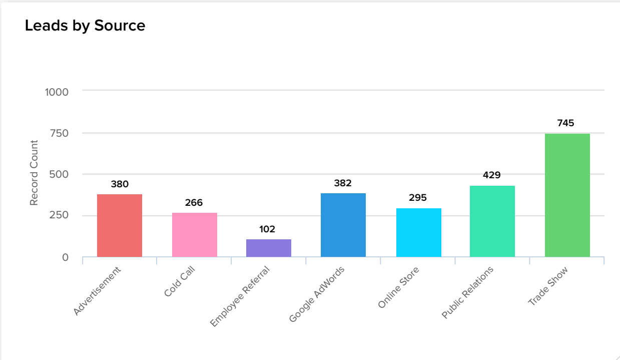


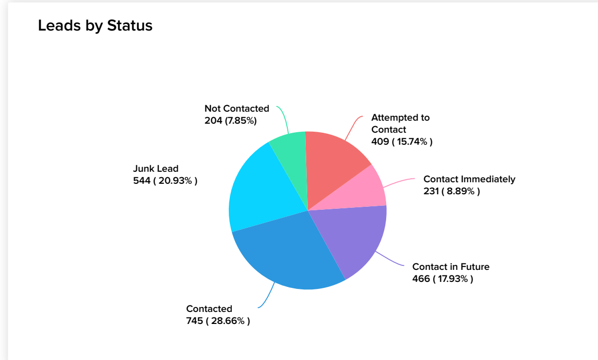
A CRM is all about making the system do the work for you.

Sending mass emails in different time zones, updating your inventory, etc. are some of the repetitive tasks most businesses have to endure. That's where Zoho CRM's templates and Macros come in. You'll find that your workload is significantly reduced.

Creating a template saves you the effort of manually constructing an email. Setting up a Macro lets you send that email at specific periods, without having to send it yourself. For example, set up a Macro to send an email when the deal is closed, or when an activity is completed.

Make yourself at home





My activities

SUBJECT	ACTIVITY TYPE	FROM	TO	DUE DATE	STATUS	PRIORITY	RELATED TO	CONTACT NAME	ACTIVITY OWNER
Pricing discussion	Events	Jun 21 09:00 PM	Jun 21 10:30 PM			High	Bonnie Jackson	Bonnie Jackson	Patricia Boyle
Website draft	Tasks	Jun 21 09:00 PM	Jun 21 10:30 PM	Jun 20	Not Started	High	Bonnie Jackson	Bonnie Jackson	Patricia Boyle
Meeting	Tasks	Jun 21 09:00 PM	Jun 21 10:30 PM	Jun 20	Not Started	Low	Fitzpatrick		James Watsonhale
Meeting	Tasks	Jun 21 09:00 PM	Jun 21 10:30 PM	Jun 21	Not Started	Low	Smith		James Watsonhale

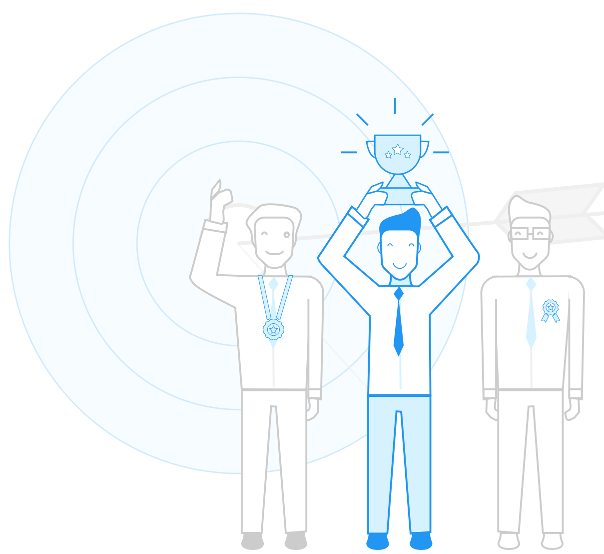
The Homepage gives you an overview of the sales side of your work. In Zoho CRM, we let you customize your homepage.

For instance, you can have the following dashboards in your homepage: Leads by Source, Pipeline by Stage(Deals), My Calls, My Open Tasks and Open Events. Normal homepage does not contain these dashboards.

Make work a game

And finally, bring in some fun to work. Use Zoho CRM's gamifaction features to bring out your reps' competitive spirit and motivate them to meet their quota. Turn on Gamescope to set up challenges and reward your team with trophies and badges.

For example, challenge your team to convert the most leads they can in a single day.



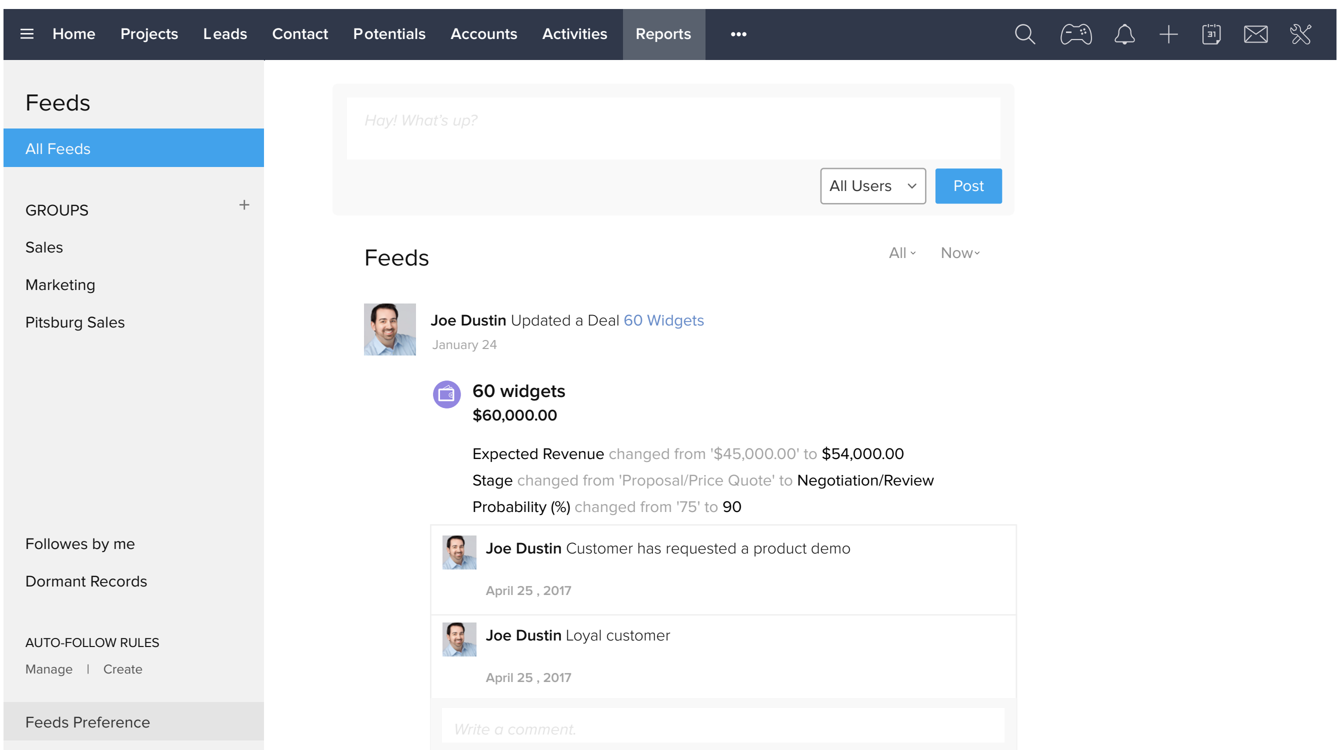
The one who converts 5 gets a trophy.

In addition to accomplishing day-to-day sales tasks, Zoho CRM's gamification features also have long-term value. For example, calculate bonuses for your sales reps based on their performance in all the games they participated in last year. This boosts morale so that they never get bored with their work.

Keep the door open to all

An organization is nothing but a cohesive unit of people who coordinate their work with the ultimate aim to increase their revenue. And of course, it involves the ones higher up the ladder too. An alarming problem in most companies is the lack of communication between the different levels or even among peers in a company. Any one from your company can get in touch with any team, hence improving coordination and ease-of-work.

Tackle this problem by enforcing the **Open Door Policy.** Contrary to popular belief, this policy works wonders. Making the organization flat has become a necessity since it is a collective effort by everyone.



In Zoho CRM, this can be made possible through the Feeds module. All of the users (employees) have access to the Feeds section and any post made by a user is visible to everyone in the organization. Much like Facebook and Twitter, users can post, comment and add attachments.

Don’t want all the employees to see your post? You can make the post visible only to select users. Another method would be to create Groups with just the specific users. Hence, if you make a post in that group, only the users in that group can view it. Based on these functions, the open door policy can be implemented easily.

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