Why You Need a
Multichannel CRM

ZOHO CRM

Contents

Communication: The essence of business.

There is no business without communication, and these days the ball is always in the customer's court. Businesses like Amazon and Zappos have spearheaded the move to a customer-centric business model. A survey by Deloitte[1] found that customer-centric businesses were 60% more profitable than traditionally-focused ones.

The rise of social media has empowered customers and given them the means to address companies directly, whenever and however they want. This means that businesses need to be ready to engage customers at all times, and across all platforms.

A cautionary tale.

Let's look at a hypothetical scenario in which the lack of a multichannel communication system in your CRM can hurt your business:

Kevin ran a small software company that built custom applications for his clients. After weeks of negotiations, he convinced a team of investors to drop by his office to meet him in two days.

Not wanting to miss this opportunity, Kevin wanted to make sure everything was in order for the visit. He looked around the office and noticed a distinct lack of comfortable chairs.

Not the one to waste any time, Kevin channeled the power of Google search to find some office chairs. He saw an ad for office chairs by a "Zylker Interiors", and clicked on it. He was directed to a page that gave him no information about the furniture available at the store.

With just a form staring back at him, he gave his email ID and contact number in the hopes that he would be contacted by the store. But as luck would have it, the only communication from the store was an email he got the next day, telling him that they hoped he found what he was looking for. Calling the attached phone number yielded no result, as no one picked up the phone.

He visited the company's website where he noticed a chat box. He let them know about his requirements. But once again, there was no response. With all his other options exhausted, he tweeted to the company without any hope for a reply.

A few minutes after the tweet was posted, he finally got a call from Zylker Interiors. Breathing a sigh of relief, he answered the call only to be bombarded by a sales rep about Victorian bedroom furnishings and kitchen decor. After a few minutes of exasperated conversation, Kevin was finally able to make the sales person understand that he was only looking for some office chairs.

The sales rep apologized and informed Kevin that someone from the relevant department would contact him in a couple of days.

And that was too much for Kevin. He cut the call and took to Twitter to criticize the company for the lack of contextual communication and late responses before stating that he decided to do business with their competitors.

> While this story might be hypothetical, it's a very real problem with a very simple solution.

Let's take a minute to dissect what happened in the above scenario. The prime takeaway is that Kevin resorted to multiple means of communication to figure out if the product he was looking for was available.

He contacted the store over the phone but no one seemed to answer. His attempt to live chat with a sales rep didn't work either. The rep may have been offline or simply missed Kevin's message.

His tweet got the company's attention, but they sadly missed the context of his inquiry. As a result, he was contacted by a sales rep from a completely different department.

The culmination of this interaction was a scathing tweet about the company's disconnected communication, late responses, and poor service. As many of us know, things go from bad to worse when complaints like these hit Twitter. Not only is a customer lost, but our brand reputation is damaged.

A customer today has access to numerous channels to contact a business. As this example shows, it is vital that you are ready not just to handle the incoming information, but that you are notified in real time.

The most widely used channels of communication are:

| Email | Phone Calls | Social Media | Live Chat | In-person |

Emails. Old but still going strong.

As much as people would like to believe that email is dying, nothing could be further from the truth. Email is still one of the most highly utilized forms of business communication.

Let's set the record straight. Despite the rise of instant messaging and social media, email usage is steadily growing, with around 2.5 billion users[2] and about 4.3 billion email accounts. The numbers are still expected to rise to about 2.9 billions users by 2019.
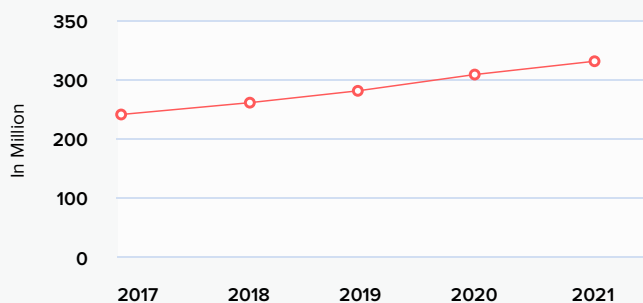
Worldwide Daily Email Traffic 2017-2021
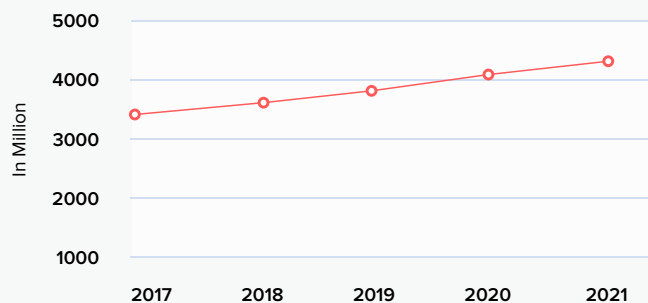
Worldwide Email User Forecast 2017-2021

To give you some perspective:

| 120 emails | The average office worker sends and receives around 120 emails a day. |

| 3.2 hours | An American worker on average, spends around 3.2 hours[3] reading their emails. |

So yes, emails are one of the most, if not the most, popular channels. This is because of email's 5 advantages over other mediums:

- Simplicity
- Free
- Immediacy
- Record keeping/Paper trail
- Powerful marketing tool

Your business should definitely have a system in place to let you engage with customers through email with proper context.

Hello from the other side.

No amount of communication technology can replace the atmosphere of an actual conversation. Nevertheless, phone calls with a prospect can give you a good idea of where the customer stands in regards to a product or a service— without having to make an in-person visitor meeting.

Are they excited to know more about the product?

Are they requesting a quote or a follow-up call?

Do they want to make a purchase now, or in the immediate future?

In fact, prospects prefer the phone, as well. According to Google[4], 70% of mobile searchers have used the **click to call feature** on their smartphone, after locating a product or service on the search engine. Of these, around 61% considered the call as an important part of the business process.

Leads generated over the phone are termed "excellent leads" by around 61% of businesses, according to a BIA/Kelsey report. So every time the phone rings, make sure that the prospect or customer on the other end is actually engaged, and has a good experience interacting with your organization.

A missed call on your end is a missed opportunity, and possibly another deal for your competitors.

Your customers are on social media. Are you?

With the rise of social media sites like Facebook, Twitter, and Instagram, it's become essential for any business to have a social media presence.

32% Others
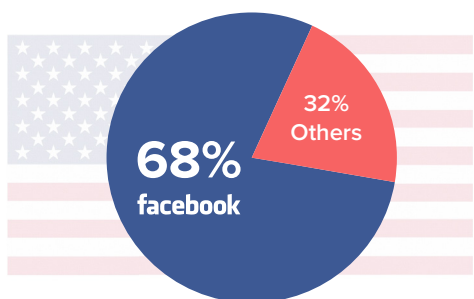
68% facebook

Facebook is the most visited website in the world. A study from the Pew Research Center found that 68% of the adults in the United States are on Facebook, a large chunk of a business' target audience.

95%
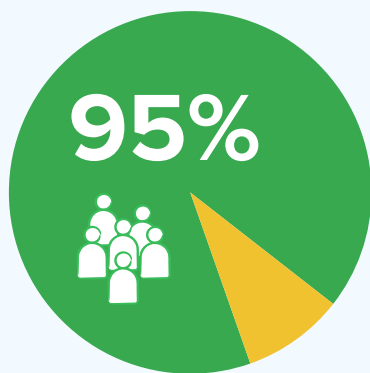
marketingsherpa

Marketing Sherpa has found that

95% of online adults[5], between the ages of 18-34, are more likely to follow a brand on social media.
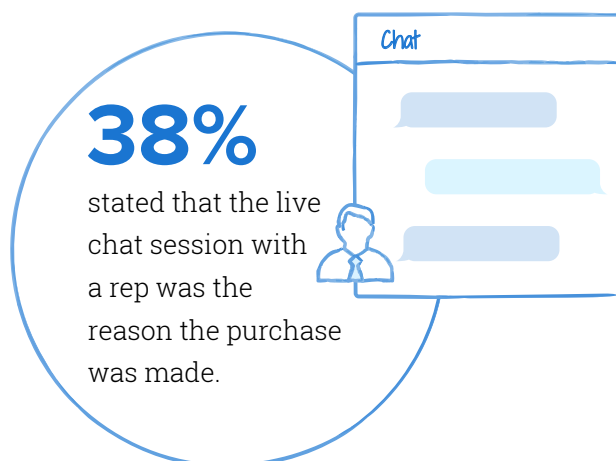
It is wise to monitor your social media feed frequently, because customers who post questions or complaints on Twitter expect a reply within the hour. [6]

In order to get the most out of social media, you primarily need to keep track of what your customers think and say about you. You also need to be sure to engage customers by addressing their questions, responding to their comments, and posting content that's relevant to your target audience.

Why wait, when you can live chat?

Although live chat can seem like a pretty inconspicuous part of a website, it holds enormous potential to improve sales and the customer experience. Customers don't have to be put on hold or wait religiously for a representative to call them back. In addition, live chat cuts down on cost and helps put you one step above the competition, in the customer's eyes.

An emarketer.com survey[7] found that:

38% stated that the live chat session with a rep was the reason the purchase was made.

62% of consumers were likely to purchase again from a site that provided live chat support.

First time Purchase
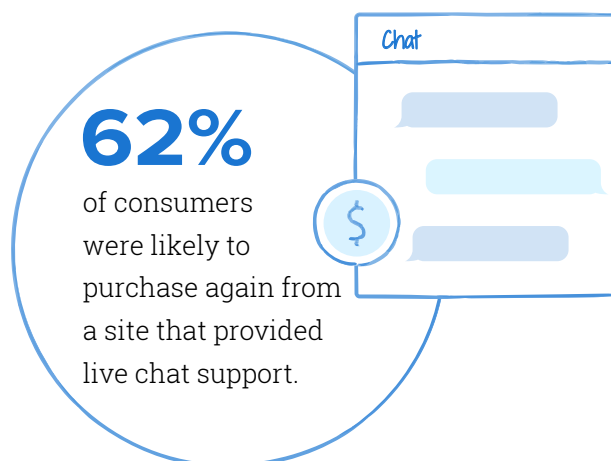
Repeated Customer

Furthermore, live chat gives you access to a customer's pain point in real time. The sales rep has the opportunity to immediately address the issue and increase the chance a sale is made.

Sometimes it's better to meet prospects and customers in-person.

In the age of a digital revolution where every aspect of a business is carried out on the web, and tightening of travel budgets amongst numerous businesses, face to face meetings may seem obsolete. But nothing couldn't be further from the truth.

95%

face-to-face meeting

40%

Deal closed

95% of subscribers said that face-to-face meetings[8] are key to building and maintaining a long-lasting business relationship. In addition, Virgin airlines found that in-person meetings also have a closing rate of 40%.[9]

Meeting customers and prospects in-person not only builds a relationship but also builds trust. Physically meeting someone gives you the opportunity to do something that digital communication does not— create a great first impression.

To make the most of in-person meetings, you need a comprehensive system that keeps track of all your customers' contact information and previous interactions. This results in an informed and possibly, a fruitful interaction with a prospect.

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A CRM that covers all your communication bases.

What is CRM?

At its core, A CRM is a tool to acquire and manage customer information in a centralized location. A CRM lets you keep track of every interaction you've had with a customer, from when they enter your system as a lead to when they convert into a recurring customer.

With so many digital mediums, it becomes hard to keep track of every email correspondence, call, and social media interaction you've had with customers. Without a CRM that can pull that information together, you'll be spending a lot more time navigating a maze of browser tabs, trying to stay on top of your interactions. To have a clear understanding of what's been said and what needs to be said, a CRM is a necessity.
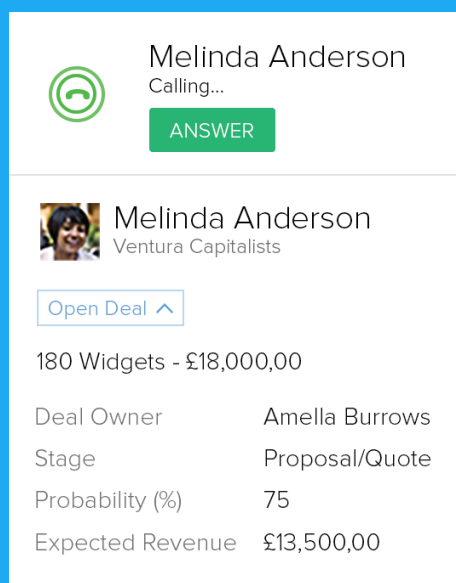
Let's see how Zoho CRM can help you utilize these Channels to the fullest!

In a few simple steps, you can integrate your email with Zoho CRM. With your email inside CRM, you'll be notified of all incoming emails and can directly respond from CRM itself. Customer emails get automatically associated with their respective records. Know if and when your customers open your emails, so you have a better idea of when to reach out.

DEALS	
David Miller	Yesterday
Request for sample logo de..	$ 4000.00
Adam Johnson	Jul 12
Web design deal- confirmat...	$ 3000.00
Martin Taylor	Jul 12
Reg: Price plans	$4000.00
Valarie Thomas	Jul 02
Clarification in pricing	$ 10,000.00
George Faulkner	Jun 31
Demo request	$ 4000.00
Patrick John Smith	Jun 21
Need business cards desig..	$ 4000.00
Sharon Glaze	Jun 13
Product Demo	$ 4,500.00

CONTACTS & LEADS	
● Jeremy Watson	10:40
Product tour!	
Maria Thomas	Yesterday
Demo request	
Steve Johnson	Jul 6
Plans and benefits	
Sandra Evans	Jul 4
Latest upgrade?	
Warren Hastings	Jul 3
Re: Welcome onboard!	
James Carter	Jun 22
Clarification in the design process	
John Dykes	Jun 22
Reminder: Portfolio	

NOT IN CRM	
● Donna Baker	11:58 AM
Regarding product features	
● Sandra Evans	10:20 AM
Tradeshow on 12/7/2016	
Twitter	9:47 AM
Follow James Carter on Twitter!	
Charles Jones	7:40 AM
Interested in your product	
Nancy Parker	Yesterday
Webinar registration	
Deborah Smith	Yesterday
Loved your tradeshow	
Veena Trivedi	Yesterday
Like to know more	

COLLEAGUES	
Robert Yonker, Me (2)	Yesterday
Re: Final Attempt	
Jennifer from Zylker	Jul 11
Choose the right plan	
Elizabeth Leon.Me (2)	Jun 13
Re: quick question	
Manish Sharma	Jun 6
New contact?	
Rose Edward	Jun 2
Trying to connect	
Elizabeth Leon.Me (2)	Jun 30
Re: Let's Schedule a call	
Manish Sharma	Jun 30
New contact?	

A deep reports system gives you insight into which of your emails are performing best, with parameters like open rate, click-through rate, and the bounce rate. With Zoho SalesInbox, you get the CRM context for all your emails because they get organized according to your pipeline. Emails that matter the most are on top, instead of the ones that came in most recently. Drag drop emails to convert them or create deals, it's that simple.

Instead of just setting reminders for what you need to do for a customer, set reminders for what the customer needs to do for you. ResponseWatch monitors the inbox for replies from specific leads/contacts and notifies you if they haven't responded in a set time period, this lets you decide on how you wish proceed with them.

Melinda Anderson
Calling...

ANSWER

Melinda Anderson
Ventura Capitalists

Open Deal ∧

180 Widgets - £18,000,00

Deal Owner	Amella Burrows
Stage	Proposal/Quote
Probability (%)	75
Expected Revenue	£13,500,00

With Zoho CRM's phonebridge integration, you can one-click call any of your leads, contacts, or prospects directly inside the CRM. The calls are automatically logged and associated with the specific lead or prospect. Add notes, and set tasks and reminders during the call. With call analytics that give an overview of how your team is performing, know where you're doing well and where you have room to improve.

With our Zoho Social integration, you stay on top of what your customers say about you on social media. Get notified of any activity that relates to your brand: including @mentions, when your posts have been shared, etc. These activities get associated with the respective lead or contact, so you can always have conversations with context the next time you interact with them. And you can even automatically add people as a lead or a contact through our Automate lead generation feature. All of this is done from right inside Zoho CRM.

Convert website visitors to customers with SalesIQ, Zoho's live chat software. Chat with your website visitors and send them targeted messages while they're browsing your site. Ascertain if they are new visitors or returning customers before you engage them. Any chat messages you missed while offline are automatically saved as notes.

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A one stop shop for all your in-person meetings is the Zoho CRM mobile app. Have a look at the map to locate nearby prospects, and check contact information and notes before you head out to meet them. You can even let your team know when you meet customers with the Check-in feature. And for those who frequently attend trade shows, you can instantly add individuals as leads into Zoho CRM through the Card Scanner app.
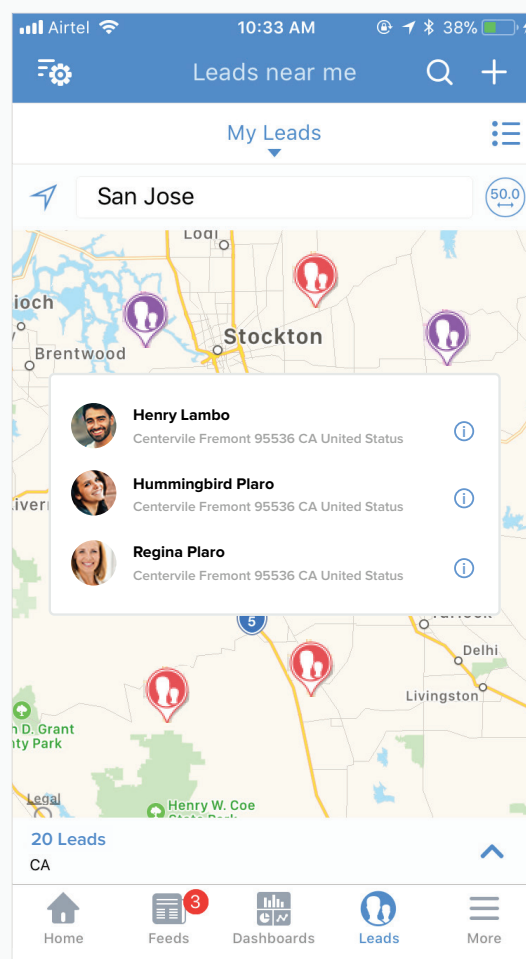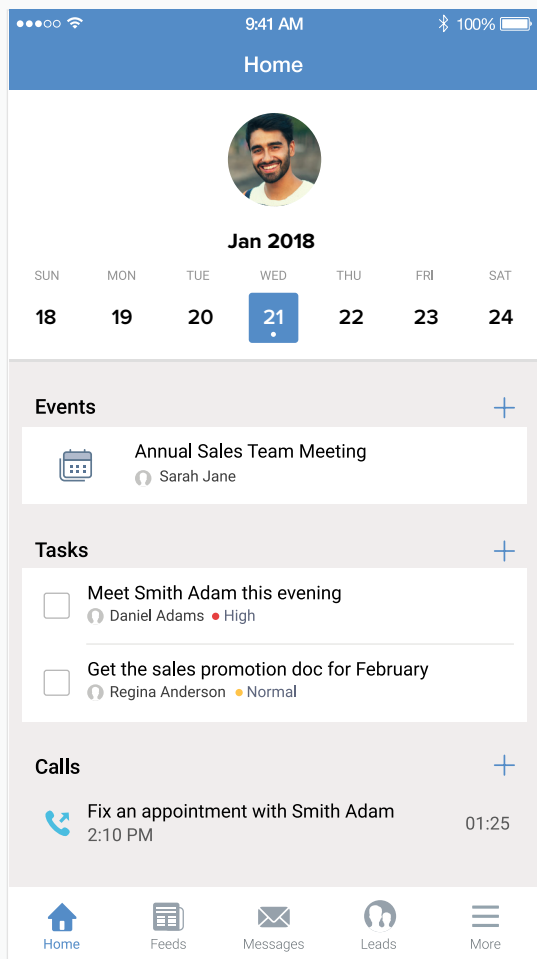
At the crux of these multiple channels is Zoho SalesSignals. SalesSignals centralizes multichannel communication into Zoho CRM through a real-time notification feed and keeps you informed on all of your customer activities from inside Zoho CRM. Whenever a prospect opens an email or mentions you in a tweet, or maybe you've missed a call, you'll receive a notification. SalesSignals also captures notifications from third-party integrations, like Zendesk, SurveyMonkey, MailChimp. SalesSignals ensures that you never miss out on engaging your customers.

Getting started.

With customer experience becoming such a vital part of the business process, you need a system that lets you listen to your customers across all channels and engage with them.

But before you adopt a multichannel communication CRM, there are a few things your organization needs to have in place to streamline the entire process and avoid miscommunication with your customers.

- Every business needs to have a digital identity these days. A place where customers can go to learn more about your organization and the types of products/services you provide. All of this can be provided with a well-crafted, easy to navigate website.

- When customers are on your website, they might find something that interests them and want to contact you to learn more. So you need updated contact information readily available. An added bonus would be adding a click-to-call functionality, so people browsing your site on mobile can call you directly, without having to exit the browser to dial your number.

- Customers are not fond of being made to wait. So instead of having to call and be directed to the right person to get their needs addressed, a live chat box helps cut this waiting time. Interact with website visitors in real time and address their pain points.

- An in-depth knowledge base should be available on your website for when customers wish to find solutions to their problems and are unable to get ahold of anyone from your organization.

- With the prominence of social media, it would be wise to have an active presence on multiple platforms. Creating and sharing content relevant to your customers and actively engaging them helps build your brand identity.

With these things in place, you'd be well equipped to handle the surge of information you'd be receiving from using a multichannel CRM and utilize it to bring in more leads, accelerate your processes, and close more deals.

If your interest has been piqued, you can try Zoho CRM for free here.

You can also write to us for any sales inquiries at sales@zohocorp.com

Reference

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