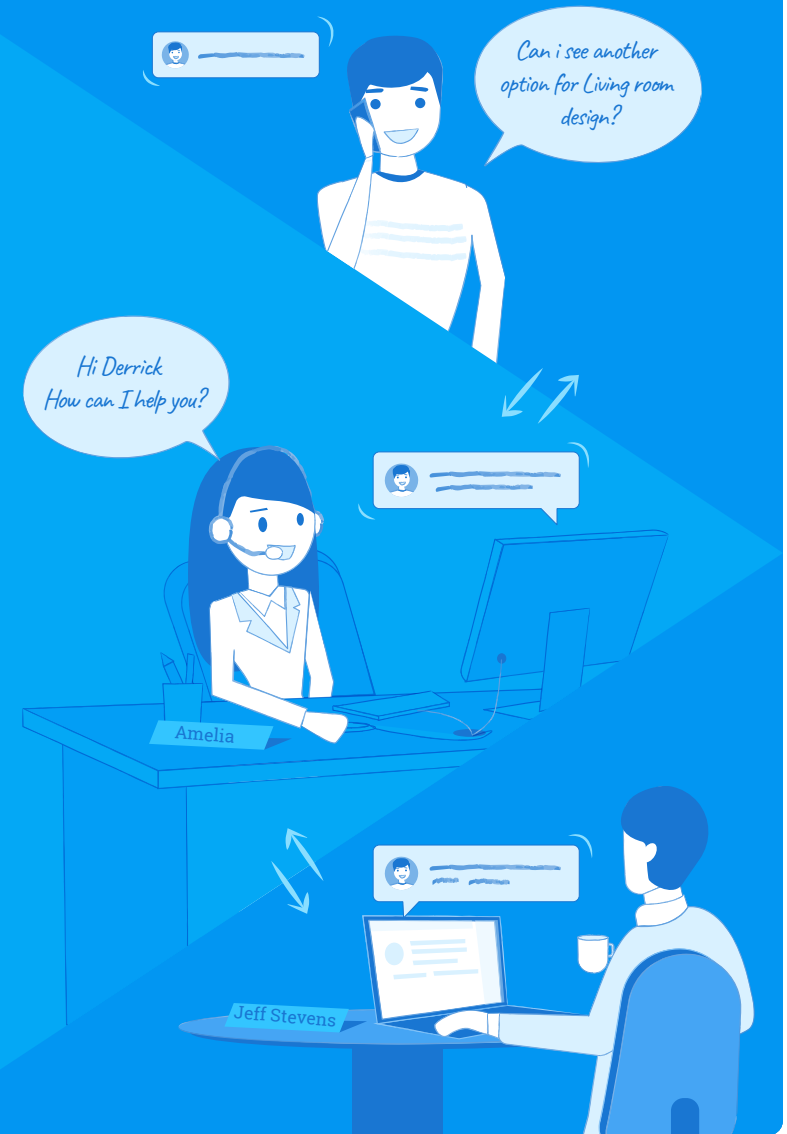


How Real-time Project Monitoring and Tracking Help Sales Teams

Sales and Project Management made Easy



ZOHIO CRM Plus

How Real-time Project Monitoring and Tracking Help Sales Teams

The ultimate objective of any business is to deliver an end product that aligns with the customer's needs.

To achieve this objective, departments such as sales, marketing, support, and project management execute their activities in their own way. However, one of the main challenges they have is the inability to connect the dots between these departments. Since each department uses different applications for their work, tracking the applications and getting a wholistic picture of customers and business is cumbersome. Businesses can overcome this challenge by integrating department functions so that they can keep track of the activities and manage them effectively.

This solution guide addresses the benefits of integrating sales and project management functions, and shows how the sales teams can benefit through this integration in CRM Plus.

Benefits of Integrating Sales and Project Management Functions

With sales and project management functions integrated together, you can:

- Always keep your internal teams and clients in sync.
- Provide better visibility to the sales and project management teams through unified task management, so they can prioritize their activities.
- Improve project management efficiency through better collaboration across departments and teams.
- View accurate sales and project management information by keeping track of customer activities and monitoring project milestones in real time.
- Have easy access to documents.
- Manage the entire customer life cycle, beginning with capturing a lead's information through project closure.

One solution that enables you to effectively manage your sales force automation and project management functions is Zoho CRM Plus. With customer relationships and project management tightly integrated in the CRM Plus suite, your sales team can respond to customers in a timely manner and ensure their requirements are met at each stage of the customer life cycle.

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 Sales Teams Benefit from Real-time Project Monitoring and Tracking in CRM Plus

Let's take the following scenario:

Derrick Williams has an apartment in Miami and wants to remodel it. He contacts Zylker Interiors, one of the leading interior design companies in Miami. Amelia who works as a sales rep in Zylker Interiors attends the call. She meets Derrick, shows him some project samples, and gathers his requirements in detail. She also understands that he is a prospective client, creates a deal, and sends a rough quote based on his requirements. Amelia captures all the interactions she's had with the client in Zoho CRM.

Amelia contacts Jeff Stevens who works as a project manager in Zylker Interiors. She arranges for a site visit, discusses key requirements with Jeff, and makes additional changes to the plan. She then prepares the plan and calculates the cost. After negotiating with the client, she finalizes the quote and the payment schedule. Amelia updates the deal details and creates a project for her client in Zoho Projects from inside Zoho CRM. She assigns Jeff as a project manager, and also gives her client access to this project.

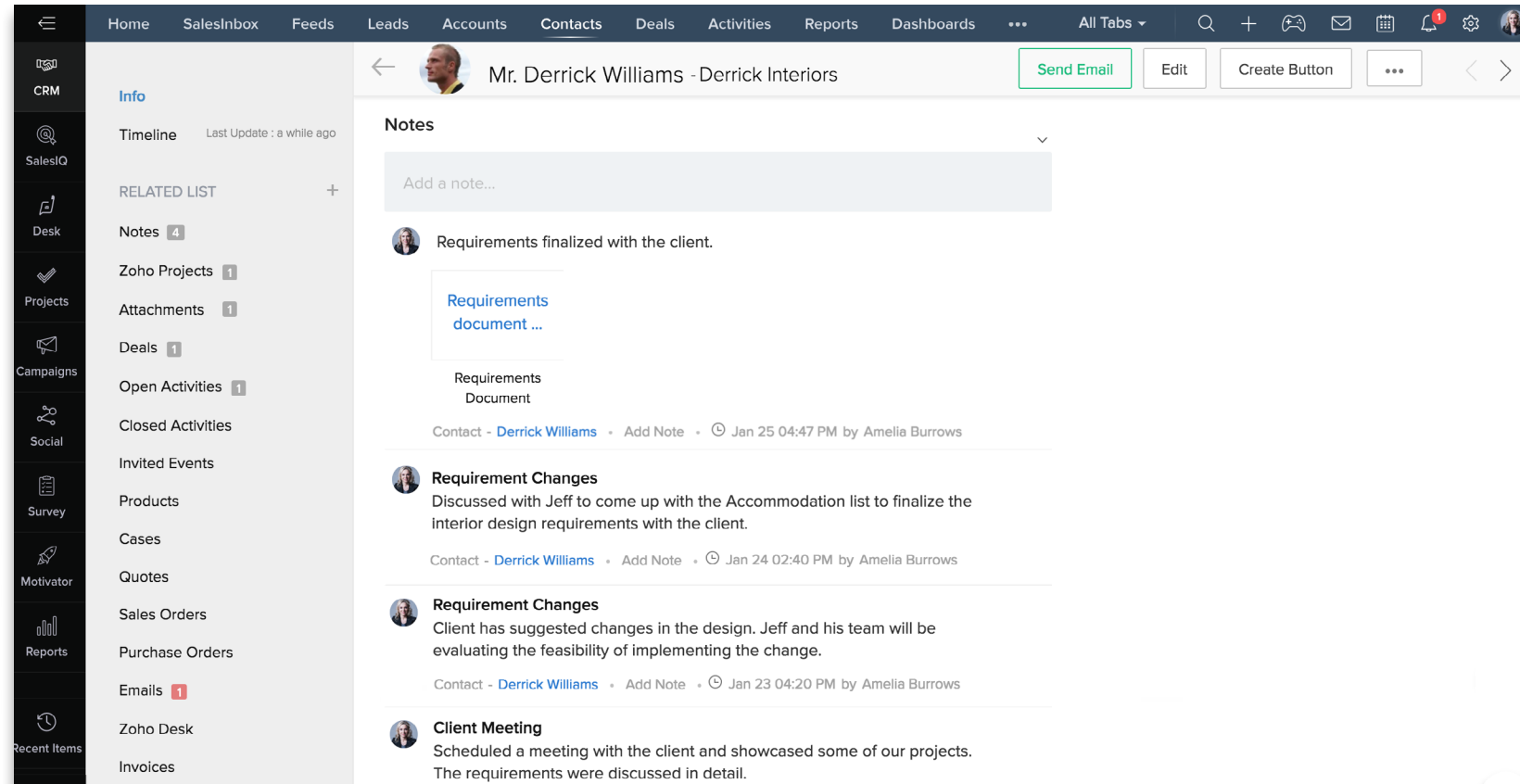
Jeff creates milestones, task lists, tasks, and timelines for each task in the project. He allocates resources for the tasks, and uploads project documents, such as requirement documents, accommodation lists, relationship diagrams, concept design, etc.

Now let's see how Zoho CRM Plus helps Amelia to monitor and track projects in real time to meet her customer's expectations.

With Zoho CRM Plus Amelia can:

- **Capture all interactions with the client in Zoho CRM**

Zoho CRM Plus enables Amelia to capture all communications, such as email exchanges, attachments, notes, and other interactions she's had with her client in CRM. This way, she can manage her sales activities effectively and ensure that none of the activities slip through the cracks.



Mr. Derrick Williams - Derrick Interiors

Send Email Edit Create Button ...

Emails Amelia Burrows + Send Email

	Received By	Subject	Date	Sent By	Status
	derrick.williams@acmein..	Requirements change in the Living room design	Jan 24	amelia.burrows@zylker.com	Delivered
	derrick.williams@acmein..	Meeting to discuss Accomodation list and require	Jan 25	amelia.burrows@zylker.com	Delivered

- **View a client's sales and project information in CRM and have real-time information of the project's status**

With the integration of Zoho CRM and Zoho Projects, Amelia can view the project and sales information of her client in CRM, which gives her better insight into the project's progress. She can also associate the existing projects of her clients from Zoho Projects inside Zoho CRM.

Once the project is created or associated, she can see the list of her client's projects in the corresponding related list section of the record's Details page. She can click a project name to view its details.

Home SalesInbox Feeds Leads Accounts **Contacts** Deals Activities Reports Dashboards ... All Tabs

Mr. Derrick Williams - Derrick Interiors

Send Email Edit Create Button ...

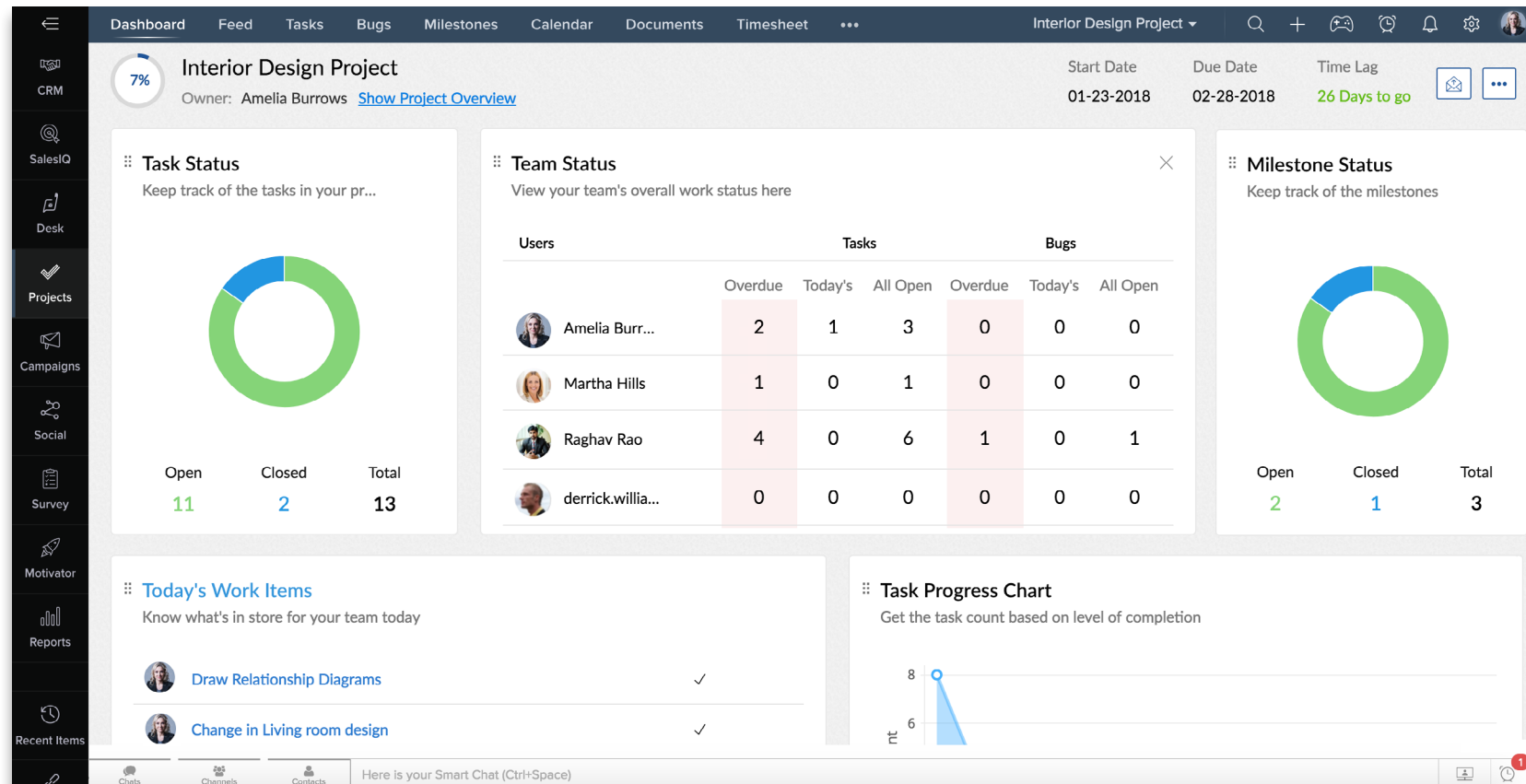
Zoho Projects Active Projects + New Project Associate Project

Project Name	Project Status	Milestones	Tasks	Bugs
Interior Design Project	Active	1 <div><div></div></div> 2	3 <div><div></div></div> 4	3 <div><div></div></div> 4

Attachments Attach

No Attachment

Amelia can view the overall summary of the project such as tasks, their completion status, bug status, milestones, and work items that are pending in the project. This dashboard gives her accurate information about the project's status and its progress.



- **Ensure project activities are completed on time through better collaboration and unified task management**

With Zoho CRM Plus, collaboration with project teams and task assignments within projects happens seamlessly within the same interface. In other words, Amelia can add a task in Zoho CRM and view them in Zoho Projects, and vice versa.

The image shows two overlapping dialog boxes from the Zoho CRM interface. The background dialog is titled "Create Task" and contains the following fields: "Subject" (Follow-up with the project team), "Due Date" (01/29/2018), "Priority" (Normal), "Owner" (Amelia Burrows), "Reminder", "Repeat", and "More Fields". At the bottom, there are two buttons: "Save" and "Save and add to Zoho Projects". The foreground dialog is titled "Add to Zoho Projects" and contains the following fields: "Client" (Derrick), "Projects" (Interior Design Project), "Tasks List" (Requirements Gathering), and "Task Name" (Follow-up with the project team). It also has a checked checkbox for "Sync with Zoho Projects" and "Save" and "Cancel" buttons at the bottom. A red arrow points from the "Save and add to Zoho Projects" button in the background dialog to the "Add to Zoho Projects" dialog.

Create Task

Subject: Follow-up with the project team

Due Date: 01/29/2018

Priority: Normal

Owner: Amelia Burrows

Reminder

Repeat

More Fields

Save Save and add to Zoho Projects

Add to Zoho Projects

Client: Derrick

Projects: Interior Design Project

Tasks List: Requirements Gathering

Task Name: Follow-up with the project team

☒ Sync with Zoho Projects

Save Cancel

Let's say she adds a note from a Task page in Zoho CRM. The notes are captured as comments in the corresponding task page in Zoho Projects.

The screenshot displays the Zoho Projects interface. On the left, a sidebar contains navigation icons for CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, Reports, and Recent Items. The main content area is titled 'Requirements Change' and shows a task page. The task is by Amelia Burrows, dated 01-24-2018, with a status of 'Open' and a priority of 'High'. It has 4 comments and is linked to a 'Zoho CRM Task'. The task page includes tabs for Comments (5), Subtask, Log Hours, Documents, Forums, Dependency, Bugs, and Activities. The comments section shows five entries: 1. Amelia Burrows (01-25-2018): 'Requirements finalized with the client.' 2. Amelia Burrows (01-25-2018): 'Discussed with Jeff to come up with the Accommodation list to finalize the interior design requirements with the client.' 3. Jeff Stevens (01-25-2018): 'Checked. It can be done within our timeframe. Please inform the customer.' 4. Amelia Burrows (24-01-2018): 'Client has suggested changes in the design. Jeff and his team will be evaluating the feasibility of implementing the change.' 5. Client Meeting (23-01-2018): 'Scheduled a meeting with the client and showcased some of our projects. The requirements were discussed in detail.'

Jeff and his team can view and respond to her comments and the response is automatically added as a note in the corresponding task page in CRM. Amelia can see this in the notes section of the corresponding task page in CRM.

The screenshot shows a CRM application interface. The top navigation bar includes tabs for Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals, Activities, Reports, and Dashboards. The left sidebar contains icons for CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, Reports, and Recent Items. The main content area is titled 'Requirements Change' and shows a task for 'Derrick Williams' due on 'Jan 25' with a 'HIGH' priority. The task description states: '@Jeff Stevens Client has requested for design change in the living room. Can you check with the designer and let me know the feasibility of implementing this change.' A note added from Zoho Projects says: 'Checked. It can be done within our timeframe. Please inform the customer.' Below the notes is a section for 'Attachments' with a table listing one file: 'Initial Requirements Document' attached by 'Amelia Burrows' on 'Jan 24' with a size of '20.45 KB'. The right sidebar shows the contact profile for 'Derrick Williams' with a 'Send Email' button, contact details (Derrick Interiors, phone, email), and a 'Best time to Contact' section indicating the next best time is '08:00 PM'.

Amelia can track project milestones and activities alongside contacts and deals easily. It enables her to be in sync with project teams and customers at every stage. She can identify if there is any delay in completing the task and collaborate with the teams more effectively to ensure the task is completed on time.

- **Have easy access to key project documents**

Amelia can easily access key project documents. She can access any file, keep track of recently modified documents, and offer instant support to customers.

The screenshot displays a CRM dashboard with a sidebar on the left containing icons for CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, Reports, Recent Items, and Quick Links. The main content area is titled 'Requirements Change' and shows a task assigned to Martha Hills. The task details include a description, task information (owner, work hours, start date, duration, completion percentage), and a recurrence section. A document viewer overlay is open, showing a document titled 'Initial Requirements Discuss' with a 'COMPOSE' button. The document content is as follows:

PROJECT: D0002-02: APARTMENT INTERIOR DESIGN

Dear Derrick,

Please find the list of requirements we discussed for your new apartment in Miami. Read through the document thoroughly and let us know if you require additional changes.

I have included all the requirements we discussed in this document. Once you finalize the requirements, I'll send you the quote. Prior to commencing the project, I require a copy of the title deeds. Our surveyors will be visiting your site before commencing the project.

- Have a 360 degree view of the customer inside the project

With Zoho CRM Plus, project managers can view full information about the client right from within Zoho Projects.

For example, Jeff Stevens can view all the information about his client such as account name, account type, deal amount, address information, etc., right from within Zoho Projects.

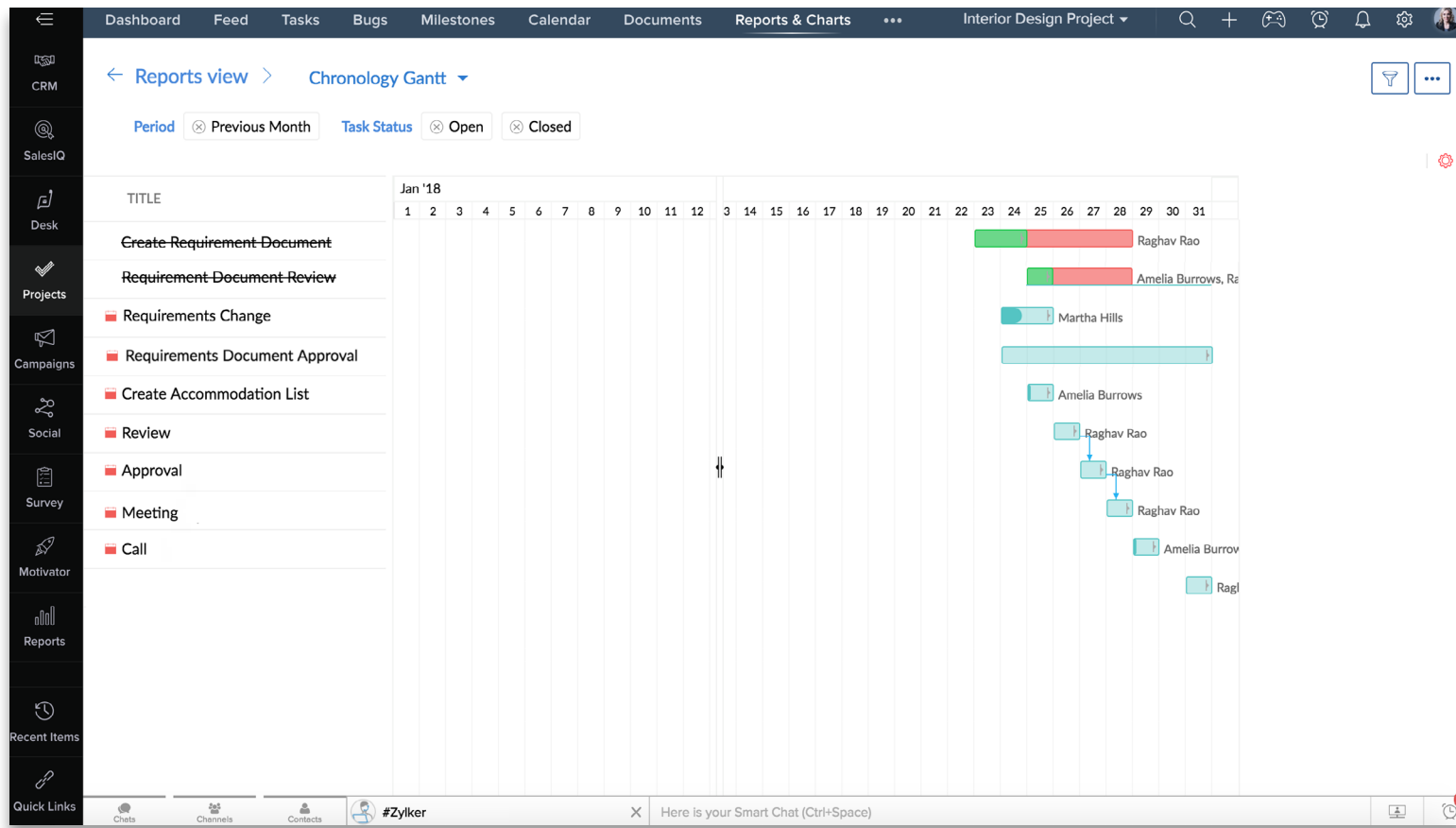
The screenshot displays the Zoho CRM interface. On the left is a dark sidebar with navigation icons for CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, and Reports. The top navigation bar includes tabs for Dashboard, Feed, Tasks, Bugs, Milestones, Calendar, Documents, Timesheet, Users, and a dropdown for 'Interior Design Project'. The main content area is split into two panels. The left panel, titled 'Users' and 'Client Users', shows a list of users with 'Derrick' selected. The right panel, titled 'Derrick', shows detailed client information under the 'CRM Account Information' tab. This includes fields for Account Name, Account Owner, Created By, Account Type, Employees, Annual Revenue, Modified By, and Last Activity Time. Below this is a section for 'Address Information'.

Client Information		CRM Account Information	CRM Potential Information
Account Name	Derrick	View in CRM	
Account Owner	Amelia Burrows		
Created By	Amelia Burrows, 2018-01-23 13:13:05		
Account Type	Prospect		
Employees	20		
Annual Revenue	100000		
Modified By	Amelia Burrows, 2018-02-05 20:44:45		
Last Activity Time	2018-02-05 20:44:45		

Address Information

- ## Measure project progress through project reports

Amelia can generate reports to measure the project's progress and identify whether the project is on track or not. She can create Gantt charts, time sheets, planned vs. actuals, and task reports by milestone, users, and tasks to check the task status. By generating these reports, she can find out whether the project activities are on track or not. She can also generate resource utilization reports to analyze productivity, and reports to identify the extent of issues reported or resolved.



Amelia can track all her sales activities and follow up with other clients, while at the same time track and monitor the progress of activities of her clients' projects. She can ensure that her client's expectations are met at each stage of the customer life cycle.

The project is now complete and the apartment is ready for Derrick to move in. He is happy with Zylker Interiors. Amelia gets her client's feedback, closes the deal, and receives payment for the work done. She then closes the project.

The screenshot displays the Zoho CRM interface for a deal named "Derrick Williams". The top navigation bar includes tabs for Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals, Activities, Reports, and Dashboards. The left sidebar contains various modules: CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, Reports, and Recent Items. The main content area shows the deal details for "Derrick Williams", including the Deal Owner (Amelia Burrows), Stage (Closed (Won)), Probability (95%), Expected Revenue (\$122500.00), and Closing Date (Feb 28, 2018). A timeline at the bottom of the deal details shows the progression of the deal through various stages, all marked as complete. Below the timeline, the contact information for Mr. Derrick Williams is displayed, including his email (derrick.williams@acmeinc.com) and phone number (+1-305-444-5999). The "NEXT ACTION" section indicates "Project closure" on Feb 28.

So you can see how the integration of sales and project management functions in Zoho CRM Plus makes it easier for the sales teams to close deals with happy customers. Sales teams can manage the entire customer life cycle and offer better services to customers. The integration helps them unify task management, keeps internal users and clients in sync, and improves collaboration between teams at every stage of the pipeline. The integration also helps them reduce missed opportunities and increases efficiency.

To learn more, go to
<https://www.zoho.com/crm/crmplus/>

Additional Resources:

Learn how integrating Zoho Projects and CRM
[helps you to go from selling to project delivery - and back.](#)

Click this [link](#) to learn how you can effectively manage projects in Zoho CRM.

Check out our [user guide](#) to learn more about Zoho Projects, or watch our [help videos](#).

Learn the [tips and tricks](#) of using Zoho Projects.

Find out [why you should use Zoho Projects](#),
and the [seven reasons for self employed professionals to choose Zoho Projects](#)

Visit [our blog](#) page to learn how to work with tasks, [task dependencies](#),
[bug tracking](#), customization options in Zoho Projects, and [centralized document management](#).

Send your feedback to support@zohocrmplus.com to help us improve further.