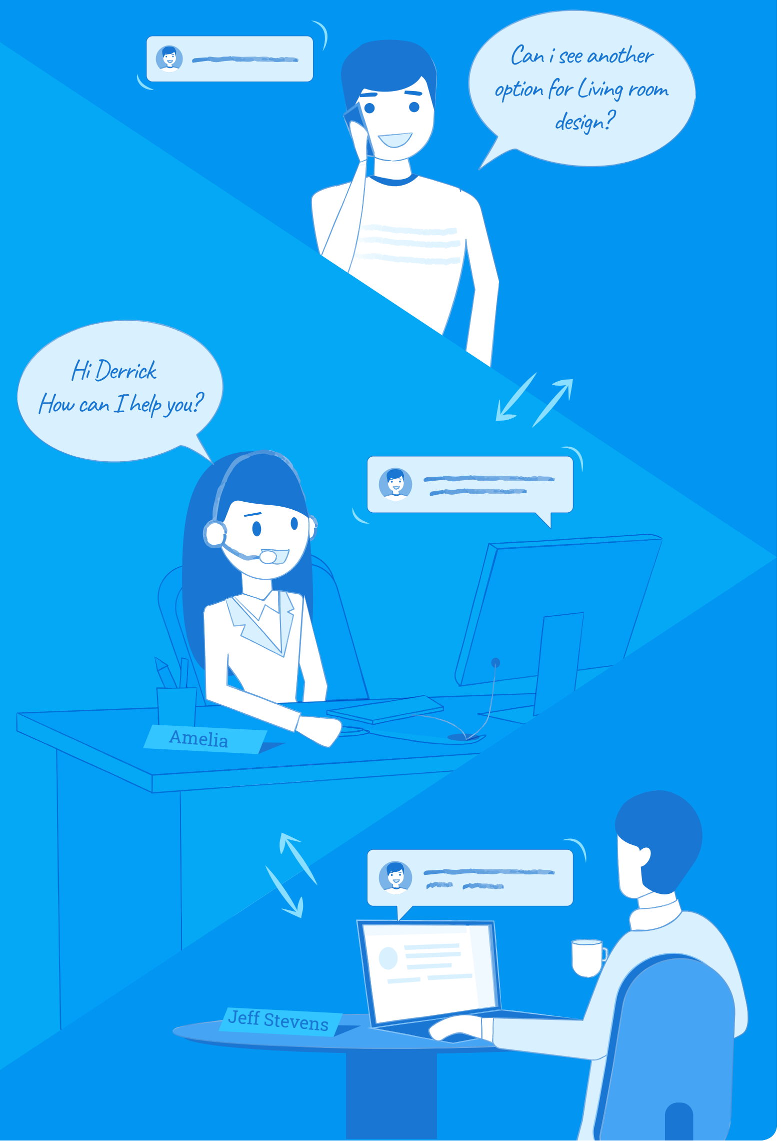
How Real-time Project Monitoring and Tracking Help Sales Teams

Sales and Project Management made Easy



Zoho CRM Plus

ZOHO

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.

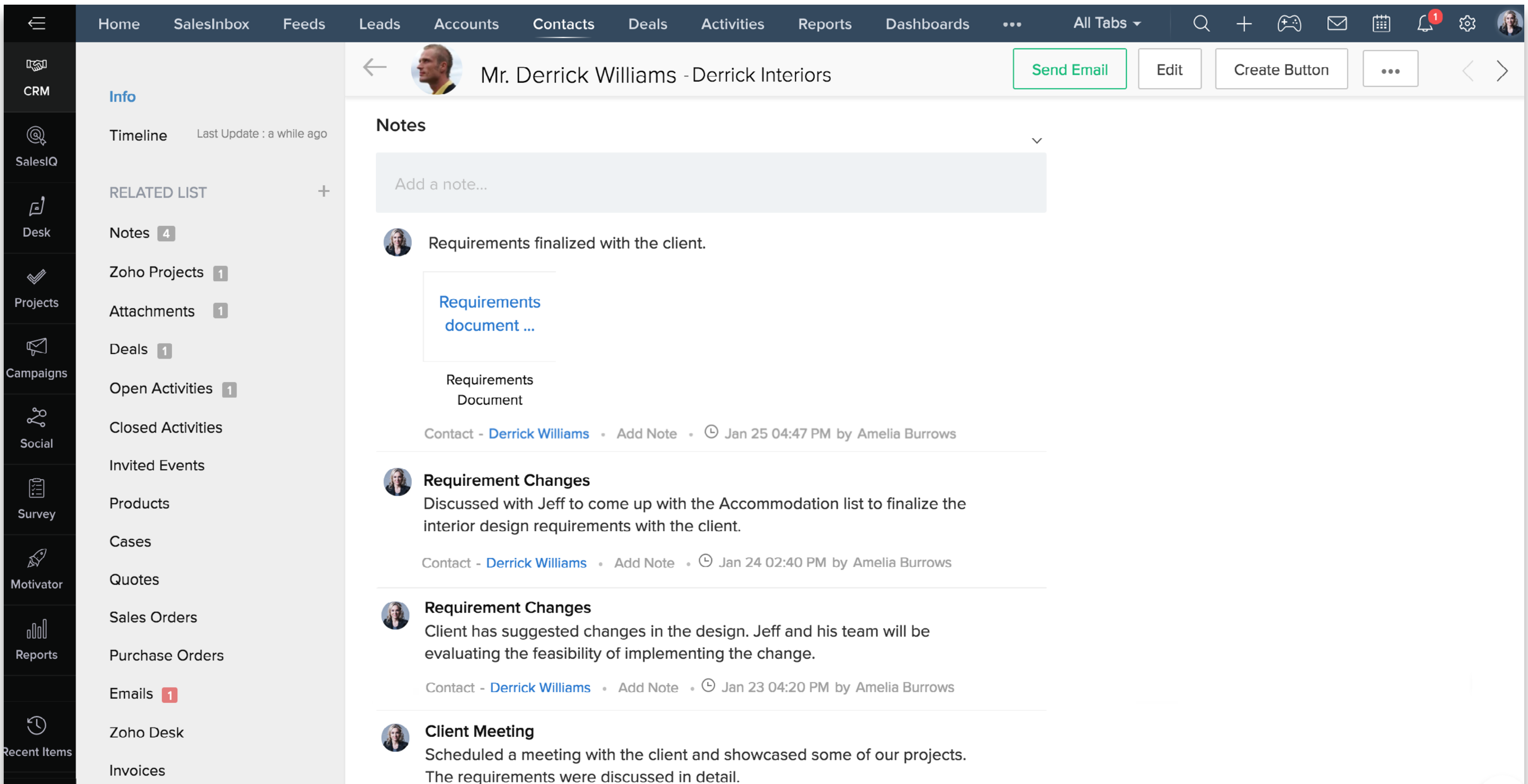
Amelia contacts Jeff Stevens who works as a project manager in Zylker Interiors. She arranges for a site visit, discusses key requirements with Jeff, and makes additional changes to the plan. She then prepares the plan and calculates the cost. After negotiating with the client, she finalizes the quote 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.

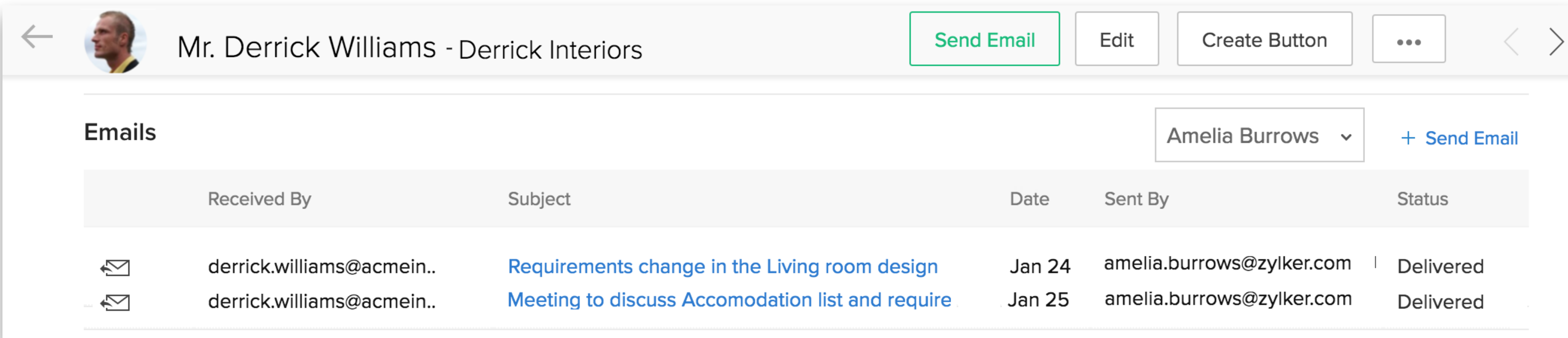
Jeff creates milestones, task lists, tasks, and timelines for each task in the project. He allocates resources for the tasks, and uploads project documents, such as requirement documents, accommodation lists, relationship diagrams, concept design, etc.

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.

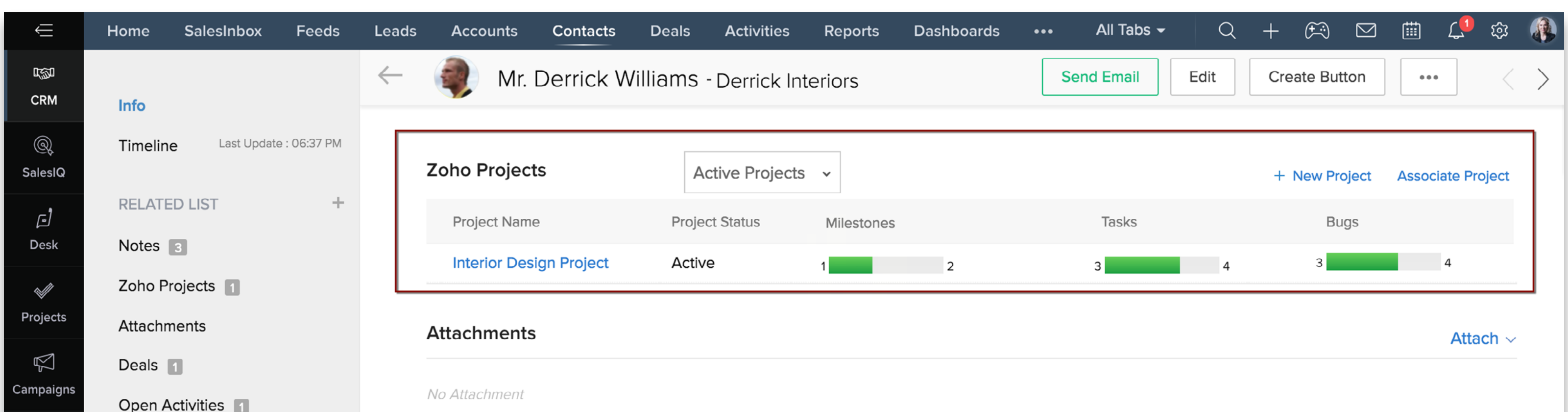




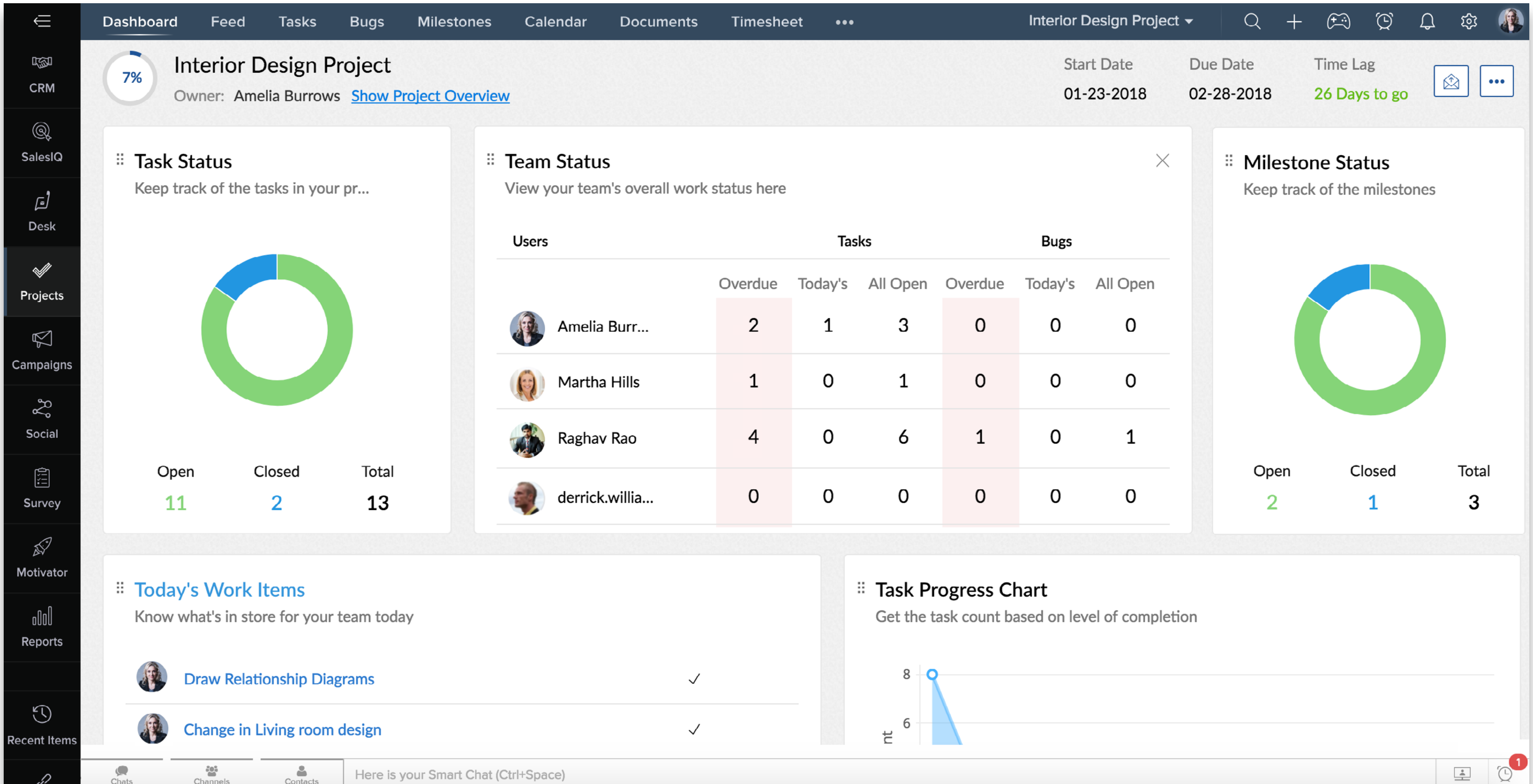
- ## View a client's sales and project information in CRM and have real-time information of the project's status

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.

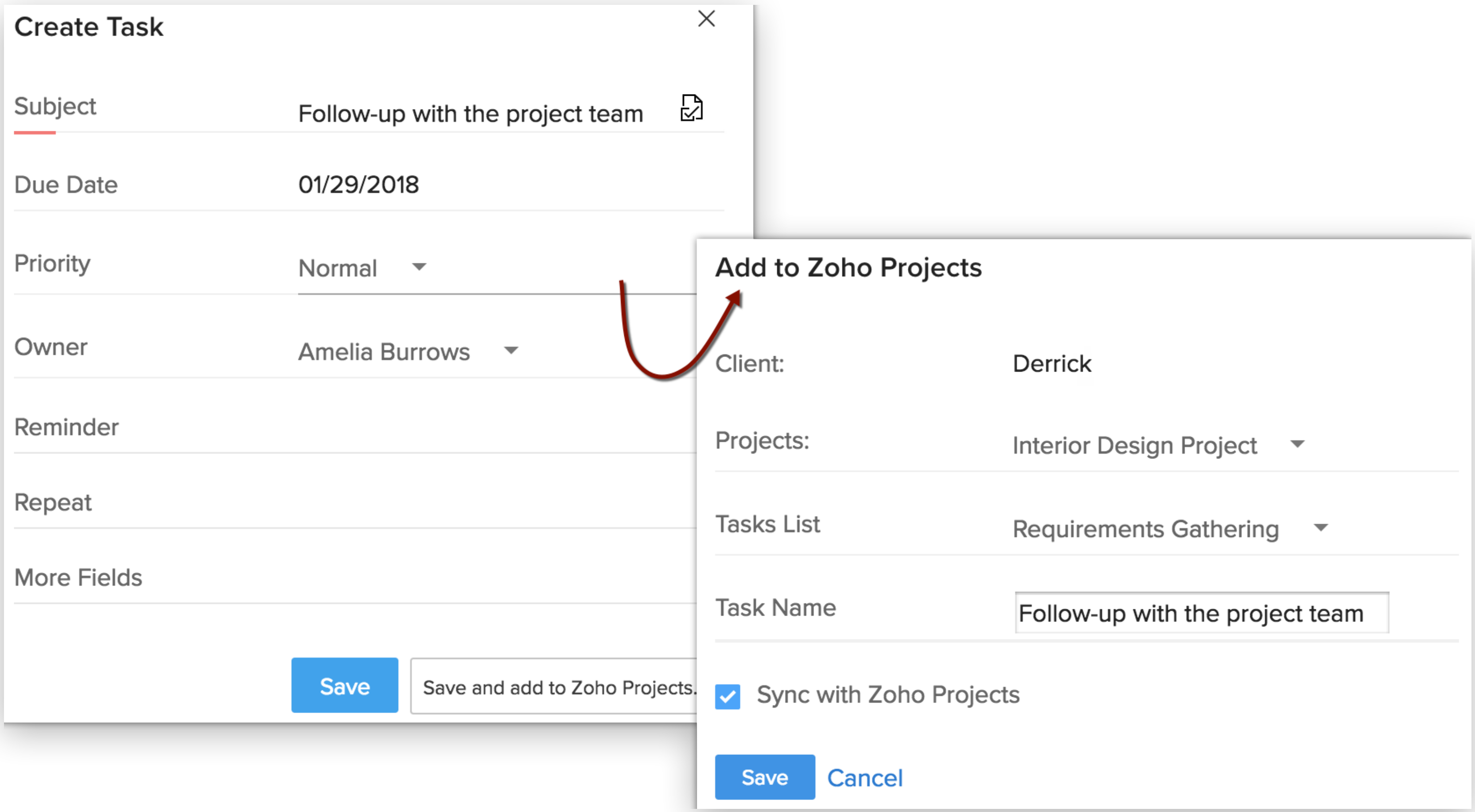


Amelia can view the overall summary of the project such as tasks, their completion status, bug status, milestones, and work items that are pending in the project. This dashboard gives her accurate information about the project's status and its progress.

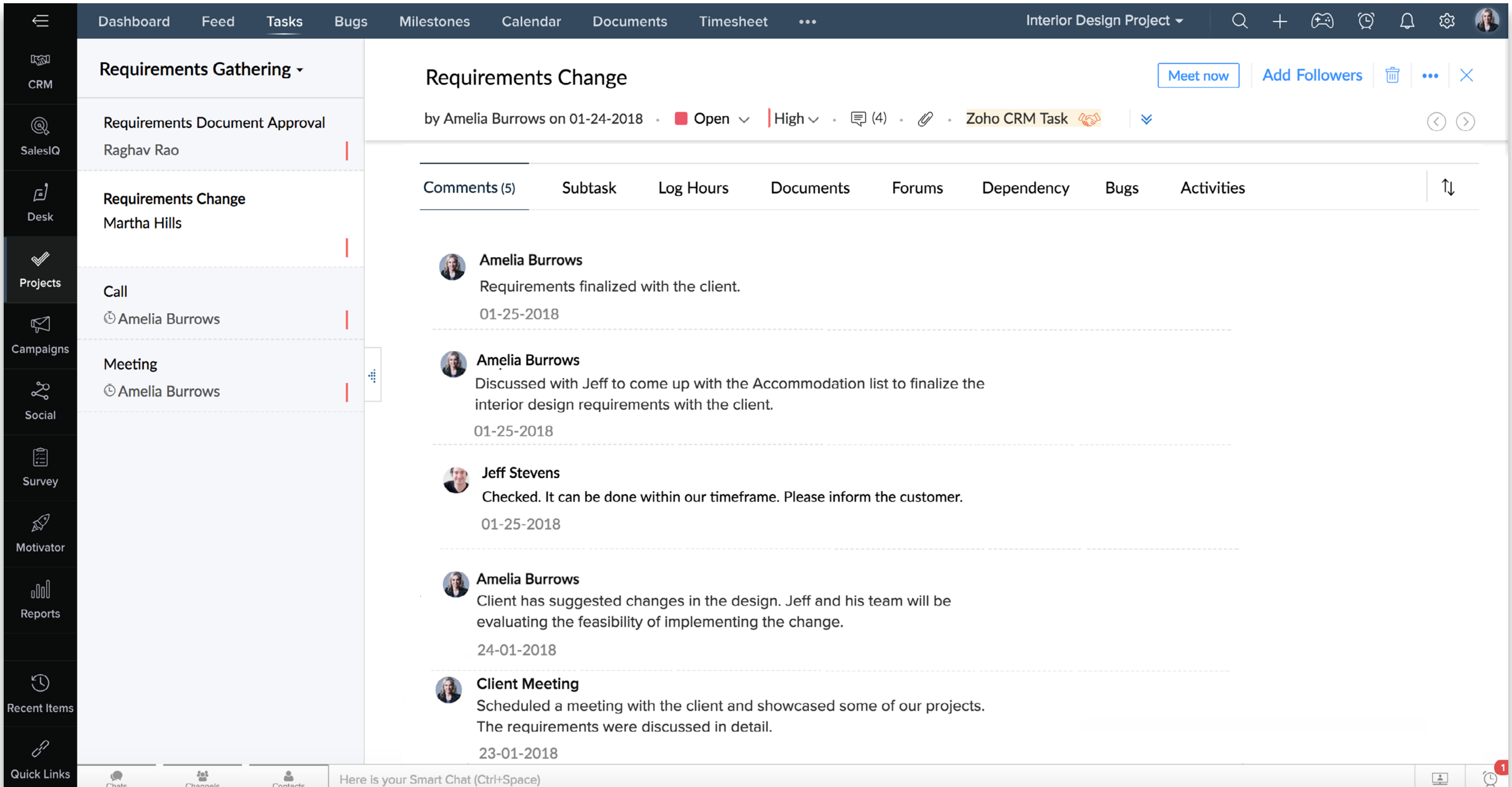


- ## Ensure project activities are completed on time through better collaboration and unified task management

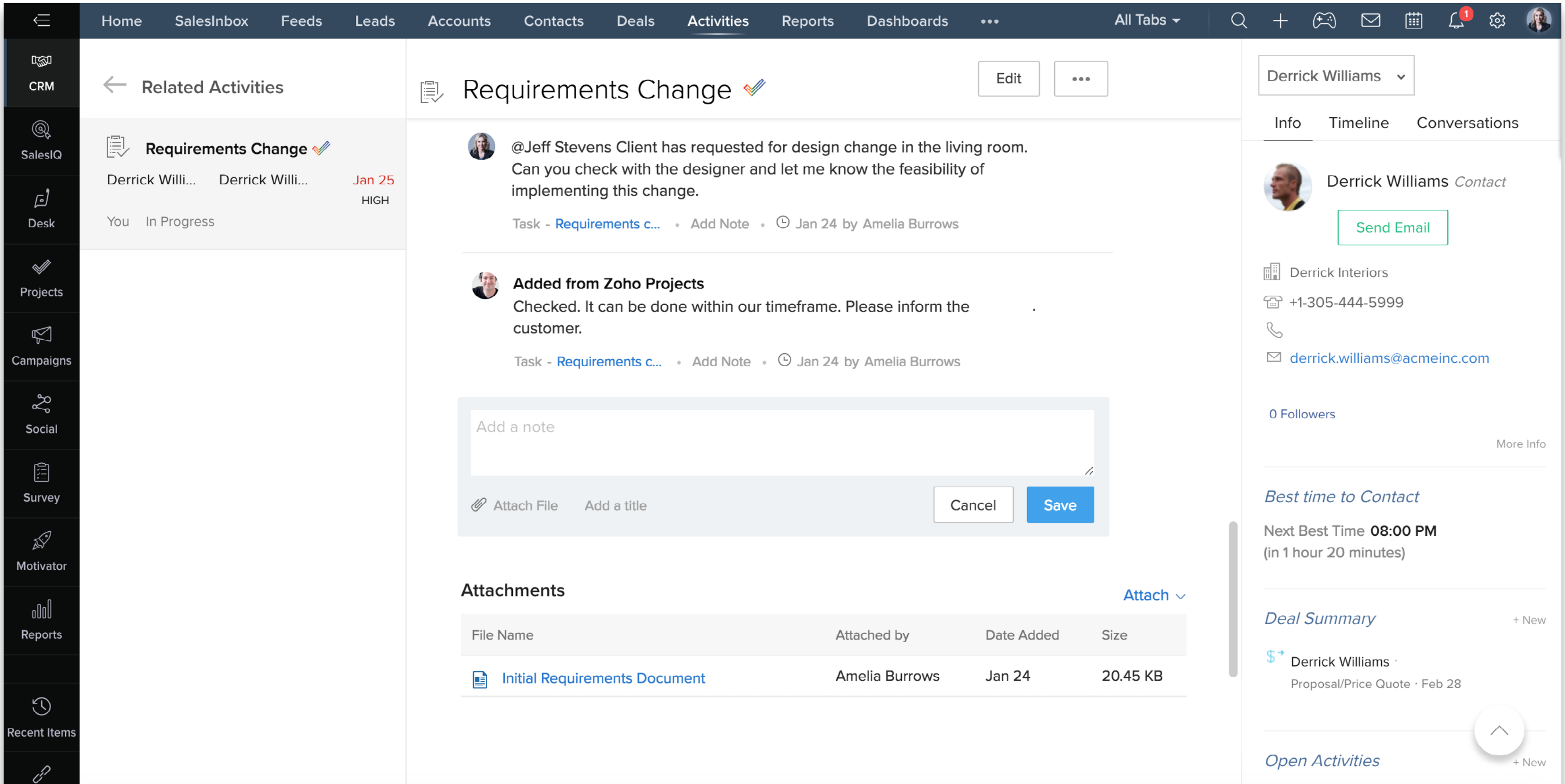
With Zoho CRM Plus, collaboration with project teams and task assignments within projects happens seamlessly within the same interface. In other words, Amelia can add a task in Zoho CRM and view them in Zoho Projects, and vice versa.



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.



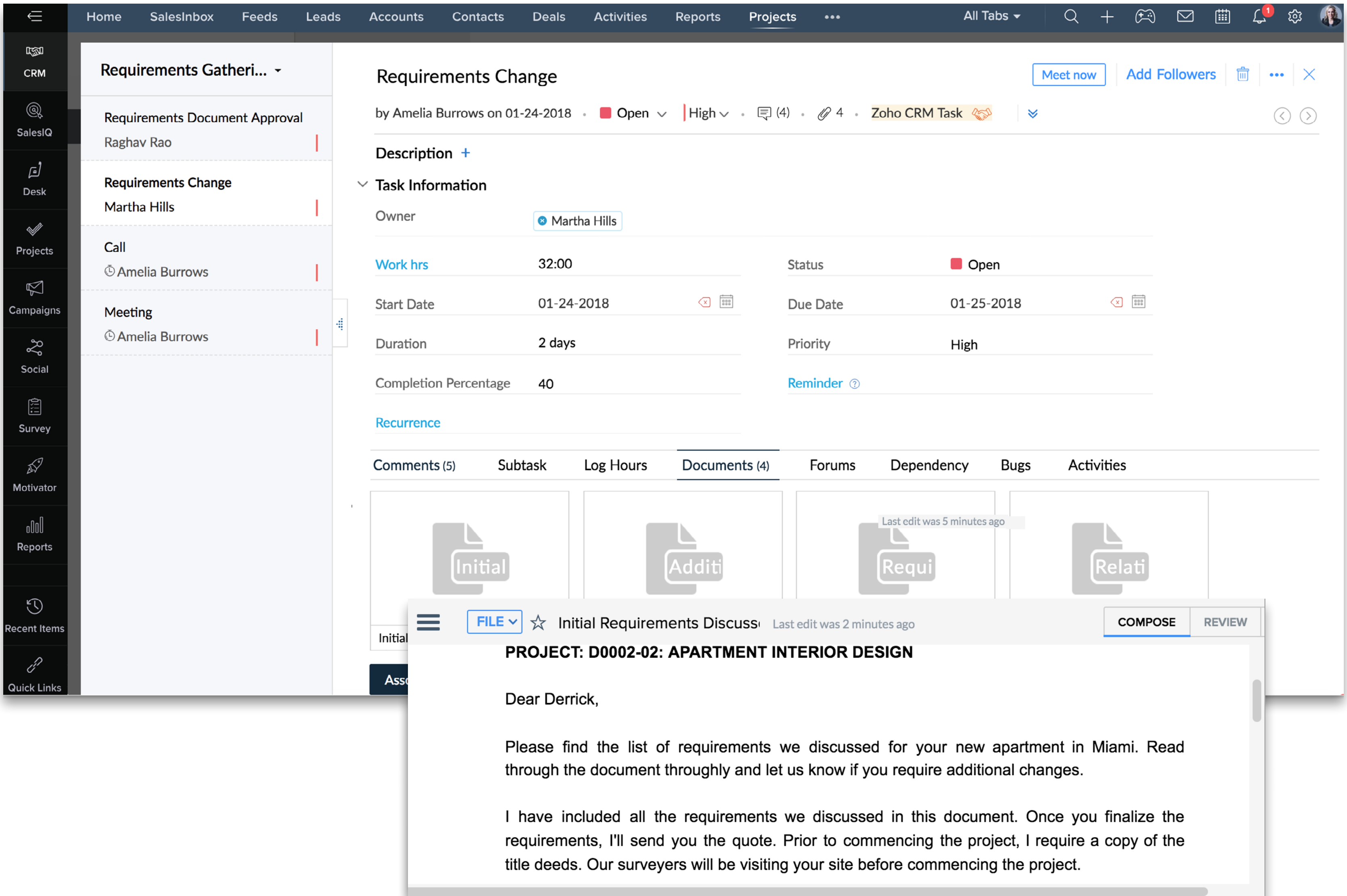
Jeff and his team can view and respond to her comments and the response is automatically added as a note in the corresponding task page in CRM. Amelia can see this in the notes section of the corresponding task page in CRM.



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.

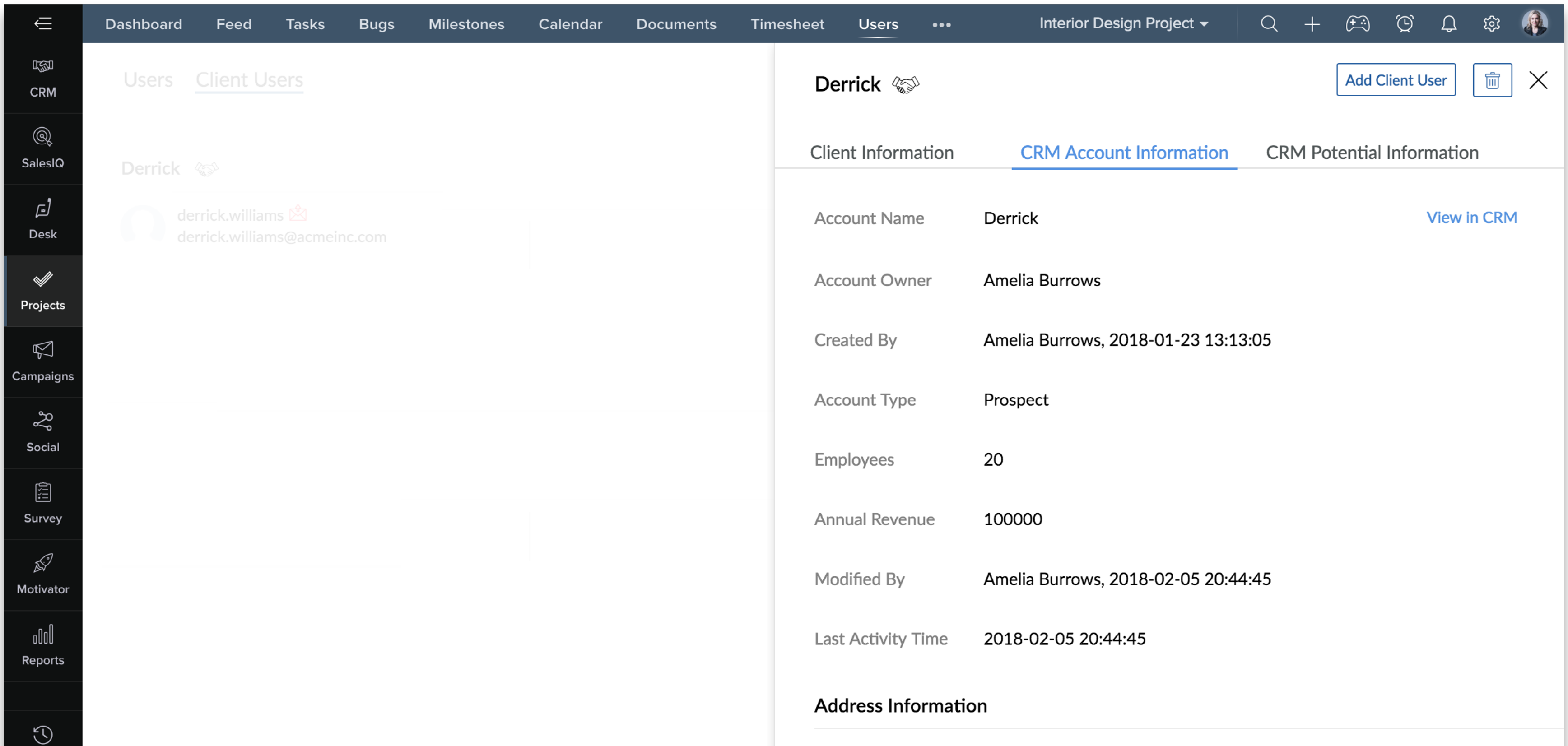
- ## Have easy access to key project documents

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



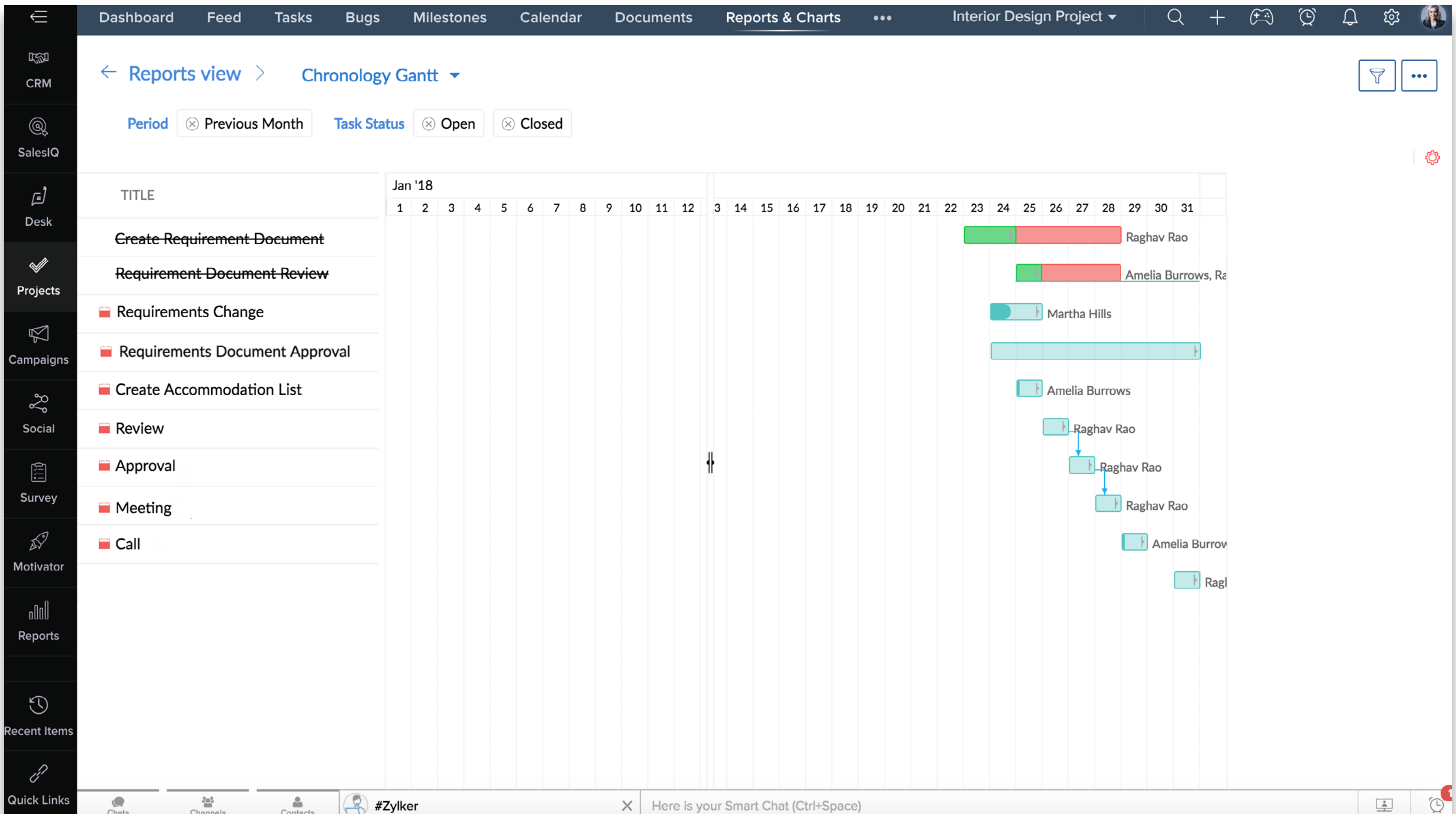
- ## Have a 360 degree view of the customer inside the project

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.



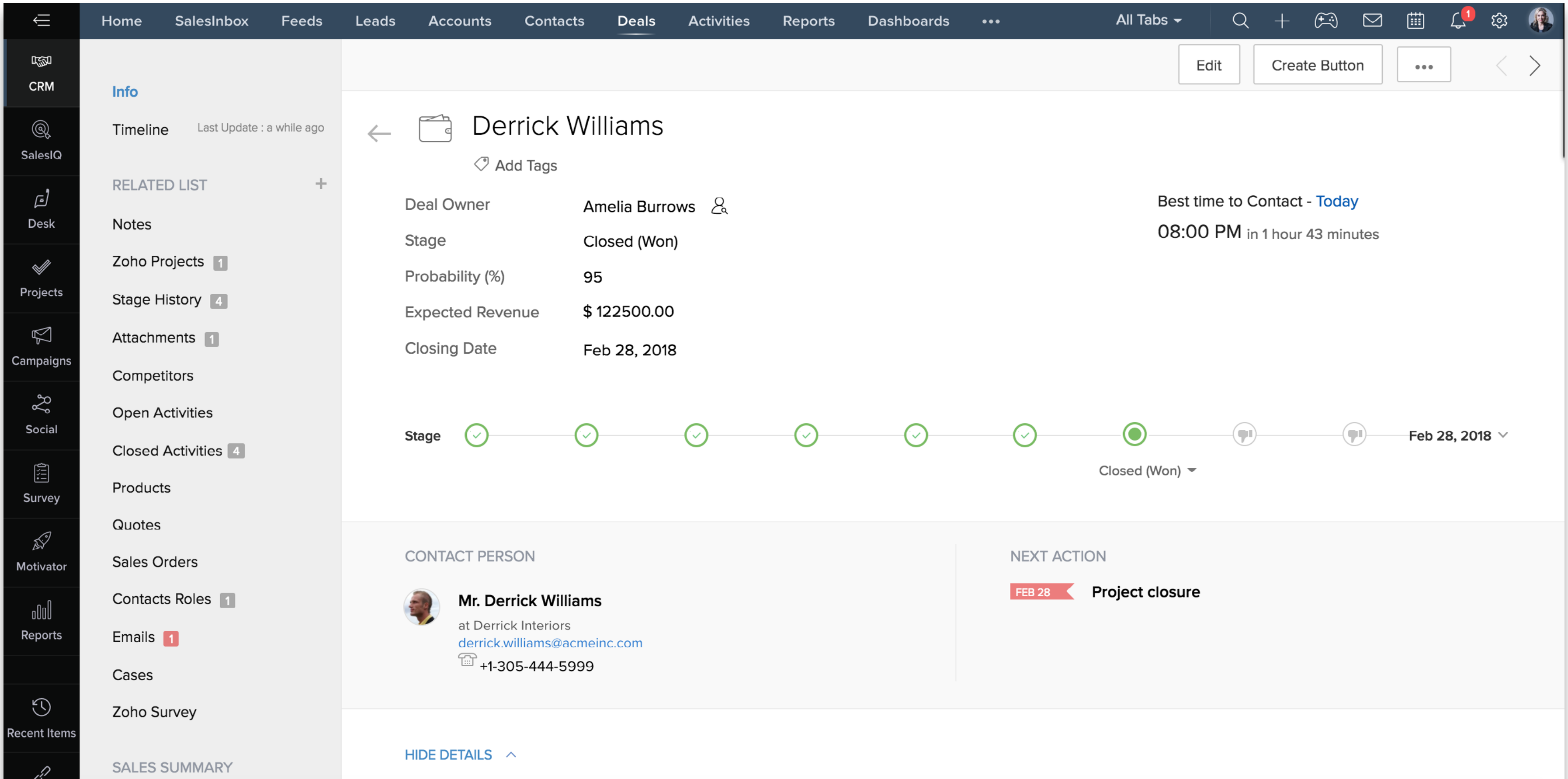
- ## Measure project progress through project reports

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, planed 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.



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.