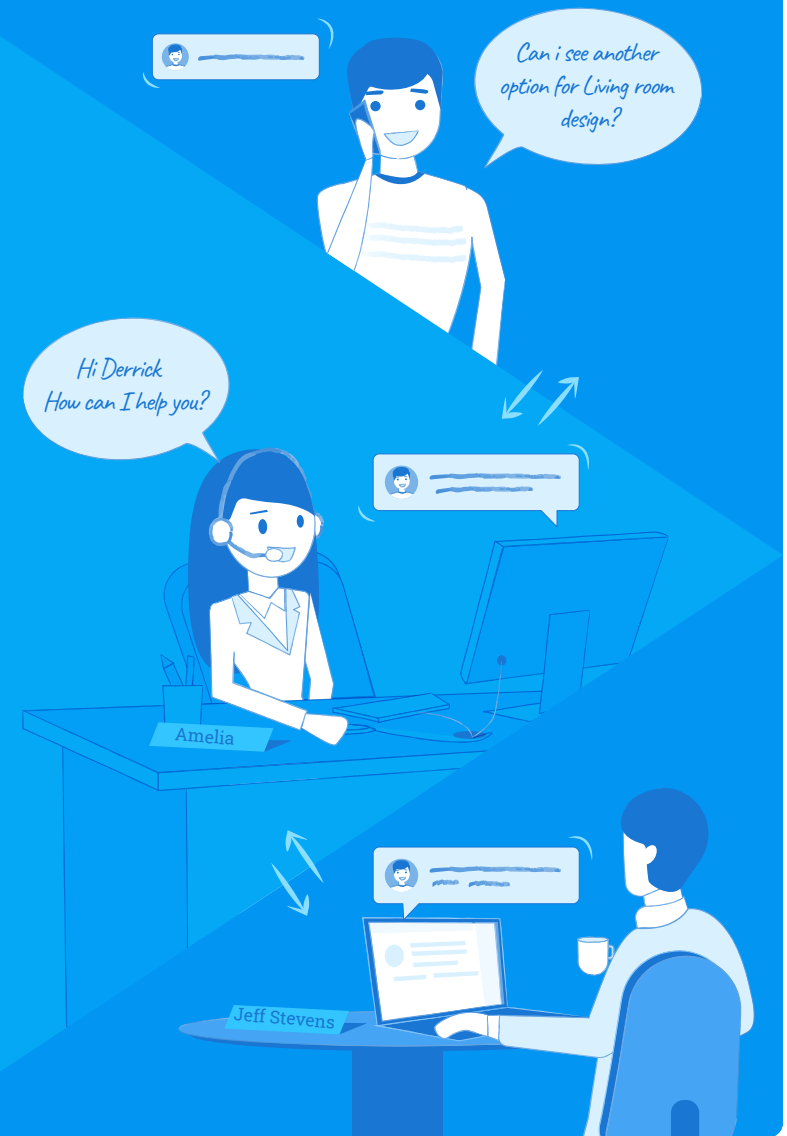


How Real-time Project Monitoring and Tracking Help Sales Teams

Sales and Project Management made Easy



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.

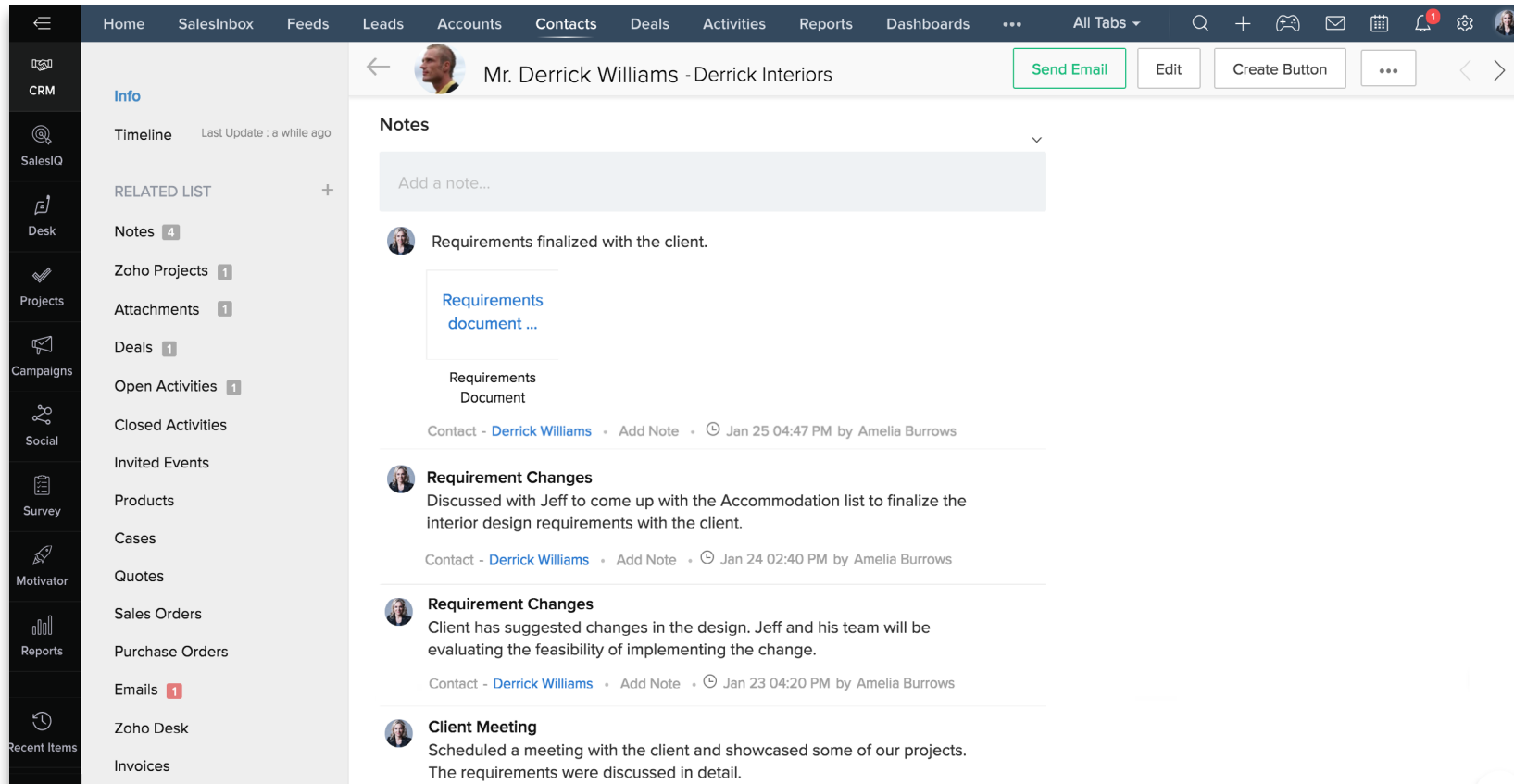
Jeff creates milestones, task lists, tasks, and timelines for each task in the project. He allocates resources for the tasks, and uploads project documents, such as requirement documents, accommodation lists, relationship diagrams, concept design, etc.

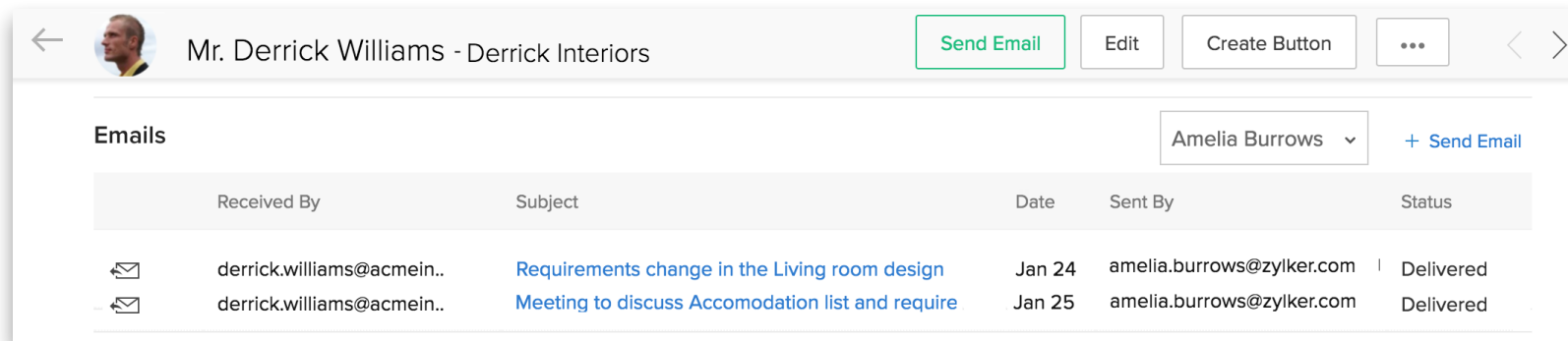
Now let's see how Zoho CRM Plus helps Amelia to monitor and track projects in real time to meet her customer's expectations.

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.

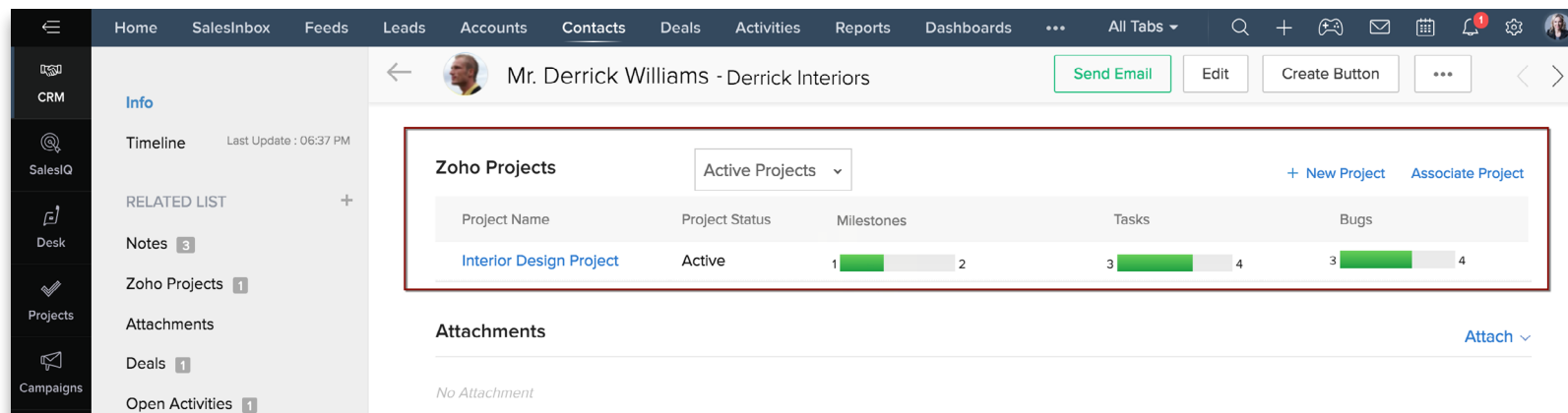




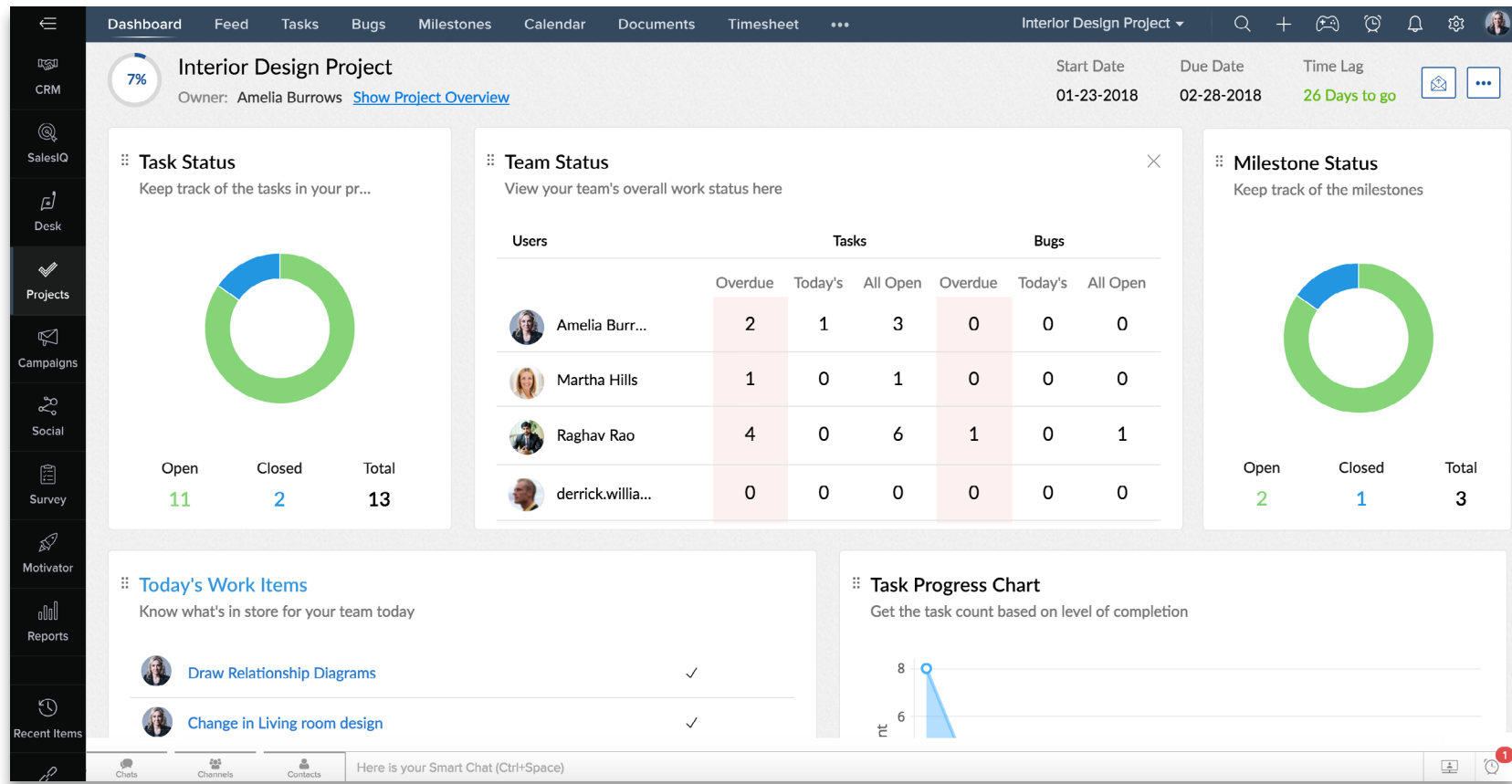
- **View a client’s sales and project information in CRM and have real-time information of the project’s status**

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.

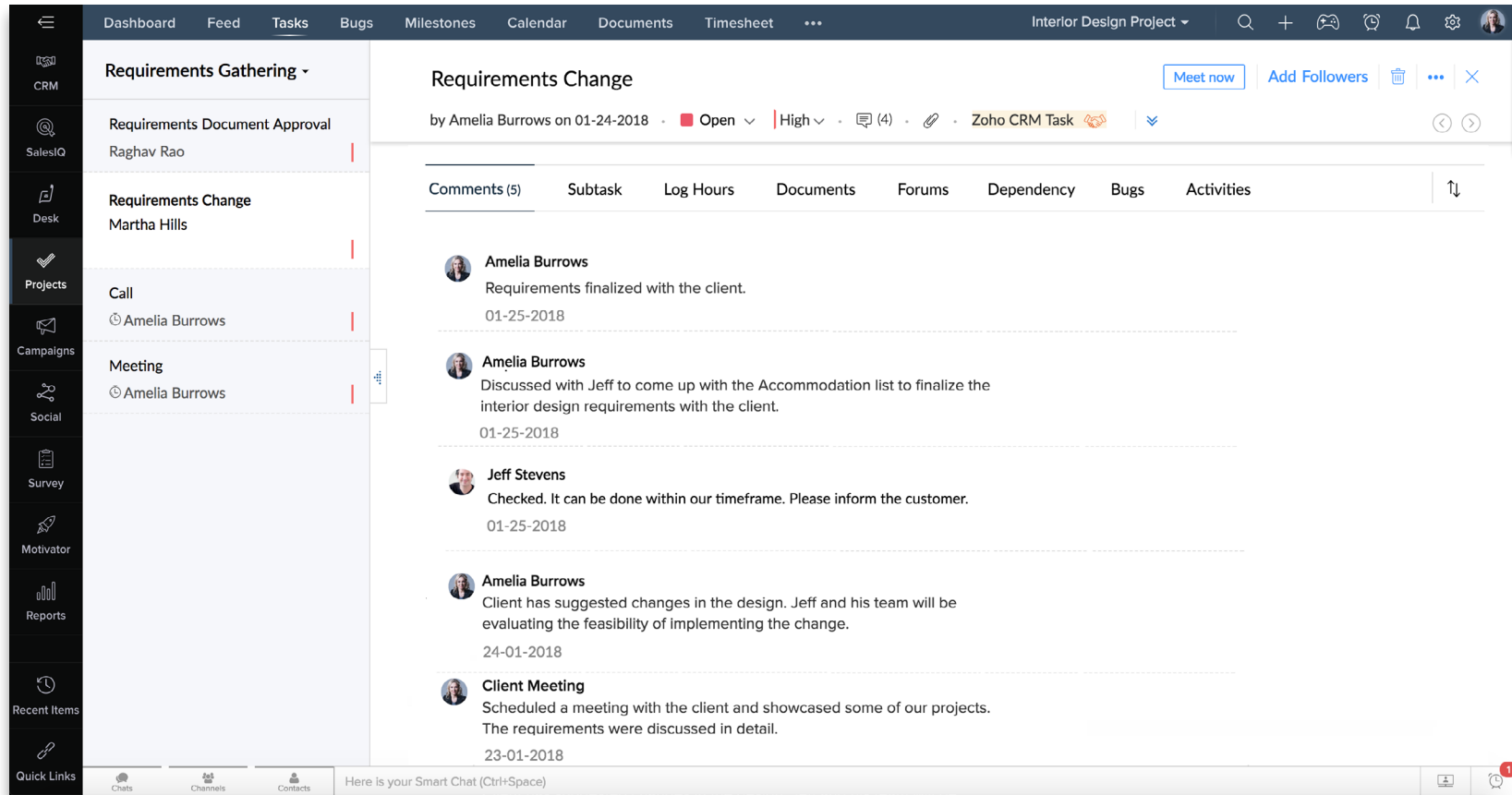


- **Ensure project activities are completed on time through better collaboration and unified task management**

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.

The image shows two overlapping dialog boxes. The top-left 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 is a "Save" button and a "Save and add to Zoho Projects" button. The bottom-right dialog is titled "Add to Zoho Projects" and contains the following fields: Client (Derrick), Projects (Interior Design Project), Tasks List (Requirements Gathering), Task Name (Follow-up with the project team), and a checked checkbox for "Sync with Zoho Projects". At the bottom, there are "Save" and "Cancel" buttons. A red arrow points from the "Save and add to Zoho Projects" button in the first dialog to the "Add to Zoho Projects" dialog.

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.

The screenshot displays a CRM interface with a dark navigation bar at the top containing menu items like Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals, Activities, Reports, and Dashboards. A left sidebar lists various CRM modules such as CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, Reports, and Recent Items.

The main content area is titled 'Requirements Change' and shows a task card for 'Derrick Williams' with a due date of 'Jan 25' and a 'HIGH' priority. The task details include:

- A note from Amelia Burrows: '@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.' (Task - Requirements c... • Add Note • Jan 24 by Amelia Burrows)
- A note from Amelia Burrows: 'Added from Zoho Projects Checked. It can be done within our timeframe. Please inform the customer.' (Task - Requirements c... • Add Note • Jan 24 by Amelia Burrows)
- An 'Add a note' form with 'Attach File' and 'Add a title' options, and 'Cancel' and 'Save' buttons.
- An 'Attachments' table with the following data:

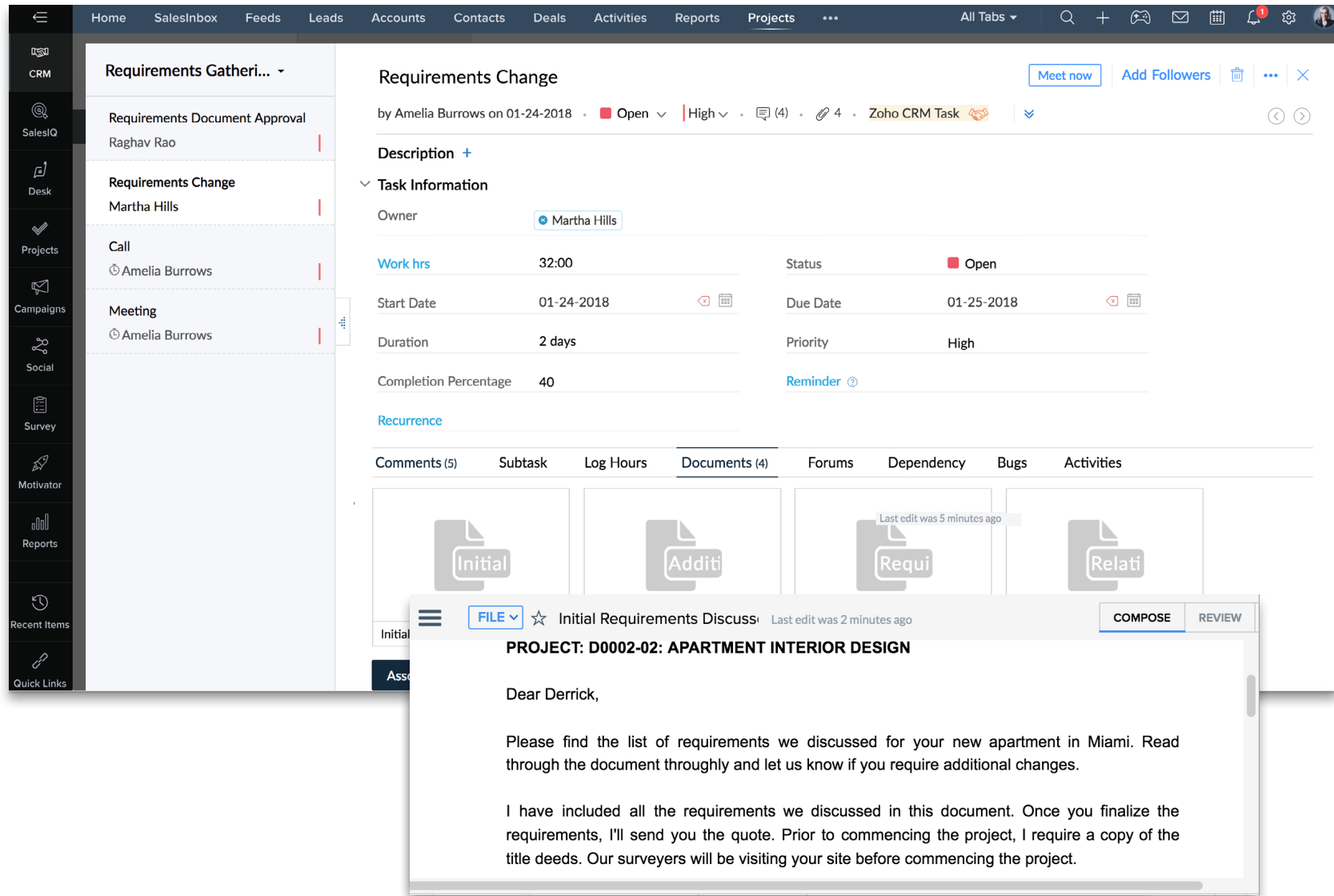
File Name	Attached by	Date Added	Size
Initial Requirements Document	Amelia Burrows	Jan 24	20.45 KB

The right sidebar shows contact information for Derrick Williams, including a 'Send Email' button, contact details (Derrick Interiors, +1-305-444-5999, derrick.williams@acmeinc.com), and a 'Best time to Contact' section indicating the next best time is 08:00 PM (in 1 hour 20 minutes). There is also a 'Deal Summary' section for a 'Proposal/Price Quote' dated Feb 28.

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.

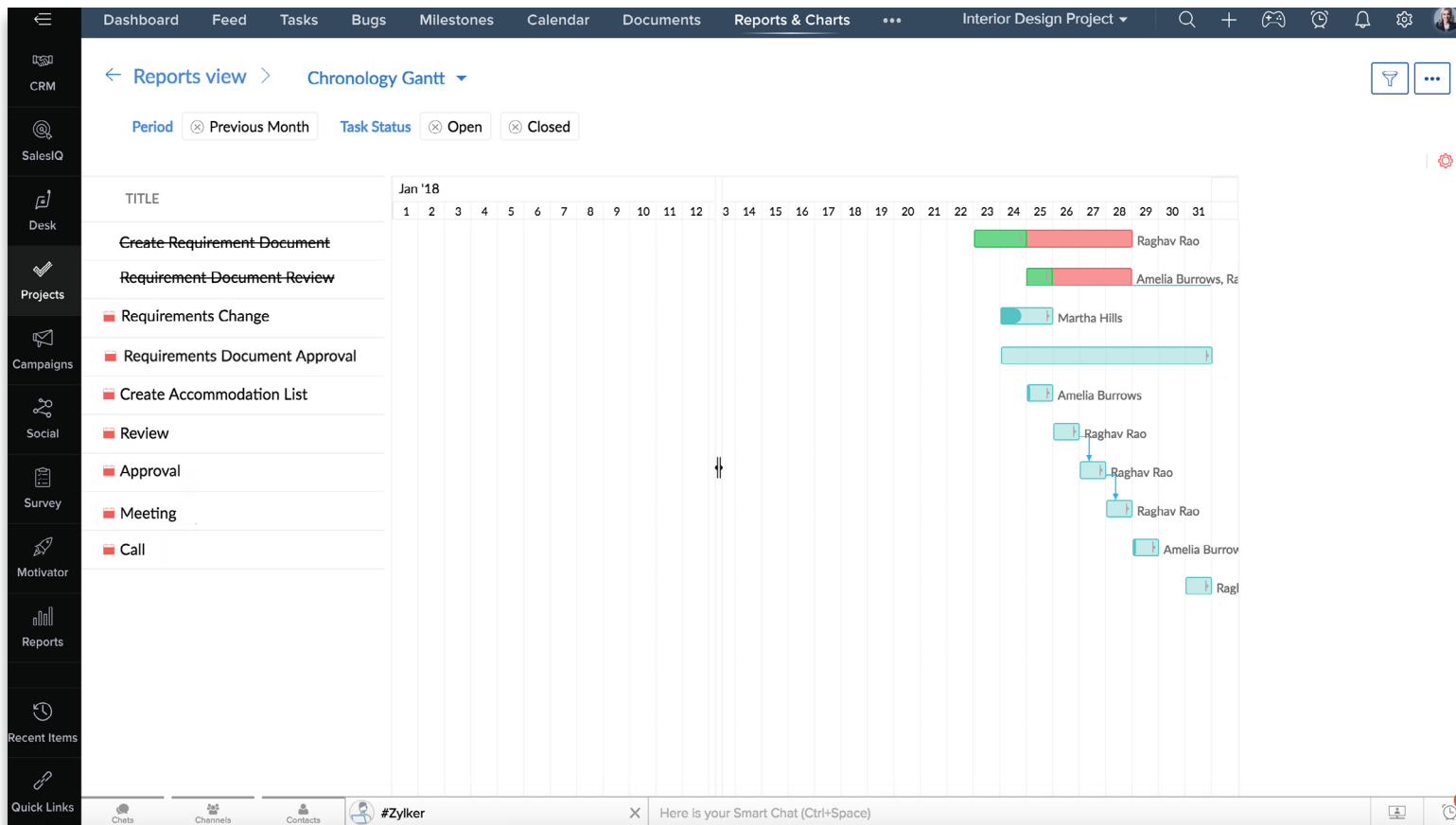
The screenshot displays the Zoho CRM Plus interface. The top navigation bar includes 'Dashboard', 'Feed', 'Tasks', 'Bugs', 'Milestones', 'Calendar', 'Documents', 'Timesheet', 'Users', and 'Interior Design Project'. The left sidebar contains icons for CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, and Reports. The main content area is split into two panels. The left panel shows 'Users' and 'Client Users' tabs, with 'Client Users' selected. It displays a card for 'Derrick' with a profile picture and email address 'derrick.williams@acmeinc.com'. The right panel shows the 'Derrick' client profile, including an 'Add Client User' button and a close button. Below this, there are three tabs: 'Client Information', 'CRM Account Information' (selected), and 'CRM Potential Information'. The 'CRM Account Information' tab displays the following data:

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	

Below the account information, there is a section for '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 record. The top navigation bar includes Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals, Activities, Reports, and Dashboards. The left sidebar contains various modules like CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Motivator, Reports, and Recent Items. The main content area shows the deal details for 'Derrick Williams', owned by Amelia Burrows. The deal is in the 'Closed (Won)' stage with a 95% probability and an expected revenue of \$122,500.00. The closing date is Feb 28, 2018. A timeline shows the deal's progress through various stages, with the final stage being 'Closed (Won)'. A 'NEXT ACTION' section indicates 'Project closure' on Feb 28. The contact person is Mr. Derrick Williams, with contact information for Derrick Interiors.

Field	Value
Deal Owner	Amelia Burrows
Stage	Closed (Won)
Probability (%)	95
Expected Revenue	\$ 122500.00
Closing Date	Feb 28, 2018

CONTACT PERSON

Mr. Derrick Williams
at Derrick Interiors
derrick.williams@acmeinc.com
+1-305-444-5999

NEXT ACTION

FEB 28 Project closure

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.