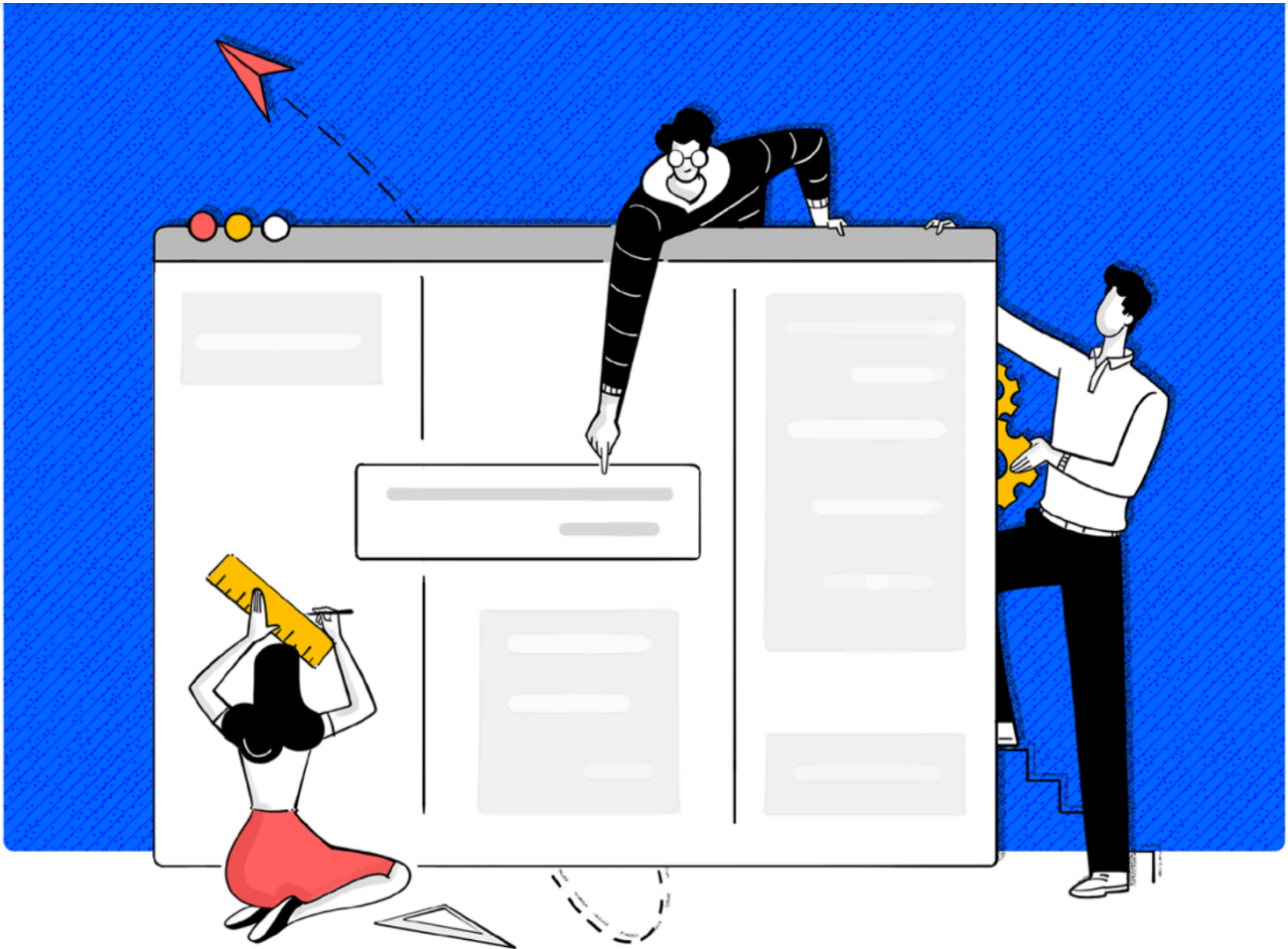


Design, Set up and Implementation Service for ZOHO ONE !! Just Rs 25,000/- one time

(Twelve Private Classes - two every week)



Key advantage of our services :

- Our Session will take you step-by-step through the implementation process.

- Our Session will address the advanced requirements of your expanding business.
- Our Session will help you identify your business goals as a MFD or Financial Intermediary in the given guideline of AMFI DDQ
- We will set up the system according to your requirement so that you can make data-driven decisions.
- Our session will include training for your team who will adopt this new CRM system.

Service Content and Proposal :

- We are not the reseller for ZOHO One subscription. You have to buy your ZOHO ONE plan directly from : <https://www.zoho.com/one/pricing/>
- We only provide the designing, Set up and Training services , which consists of 12 (twelve) classes of 2 Hrs each . The classes are private and available at timings of your choice : <https://finnsys.zohobookings.com/#/abhinesh>

Pricing / Fees :

- We charge Rs 25,000/- as an one time charges for implementing the ZOHO ONE , and providing full training on its usage (**Compulsory**)
- We charge Rs 30,000/- as an one time charges for creating website under ZOHO Sites(**optional**)
- We charge Rs 5000/- as an one time charges for all the templates (E mail & Whatsapp) designing(**optional**)



Read more details at : <https://www.armfintech.in/supercrm>



Chapters of our Training :

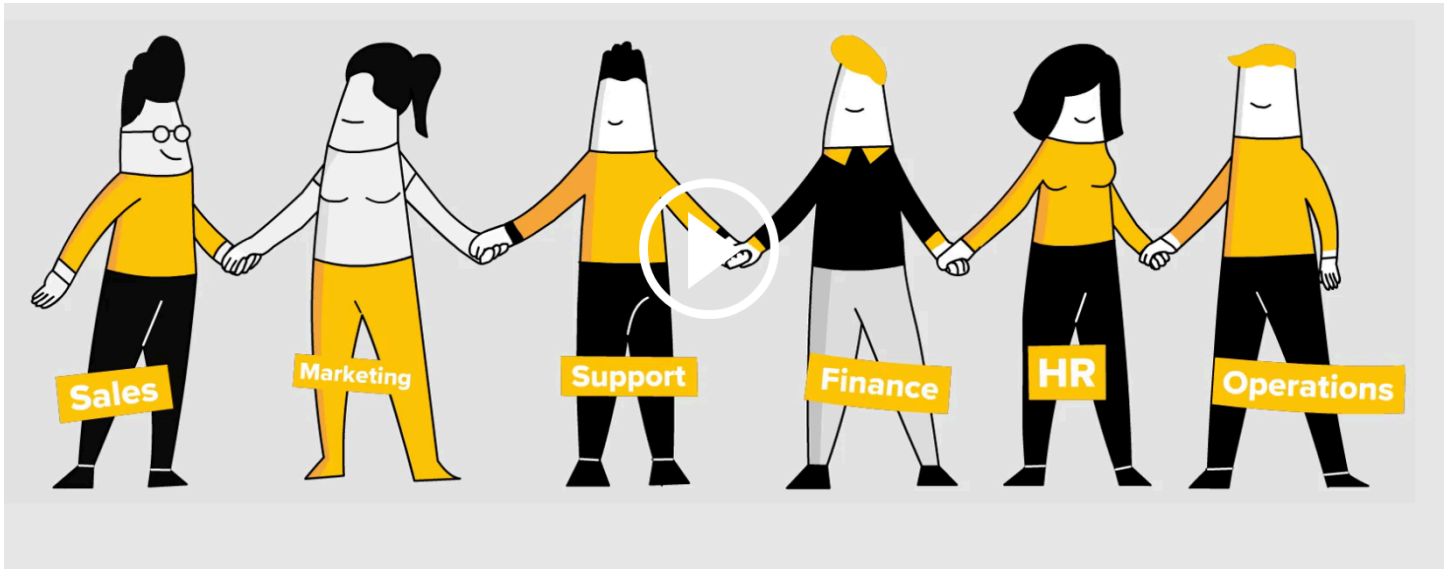
1. Understand and Activating the ZOHO One account
2. Decide the applications to be used in ZOHO One
3. Integrating E mail , Whatsapp, External Data etc in the system
4. Creating Business Pipelines and blueprints
5. Creating Stages and transitions in every Pipeline
6. .Creating Work flow automation for every pipeline
7. Creating Analytics
8. Designing Final UI



“What you will achieve through of our Training :

- It helps u create a Business Pipeline
- It helps you create work automation
- It helps you assign task to appropriate persons
- It helps you track the user level works
- It provides you many meaningful analytics as needed in your business”

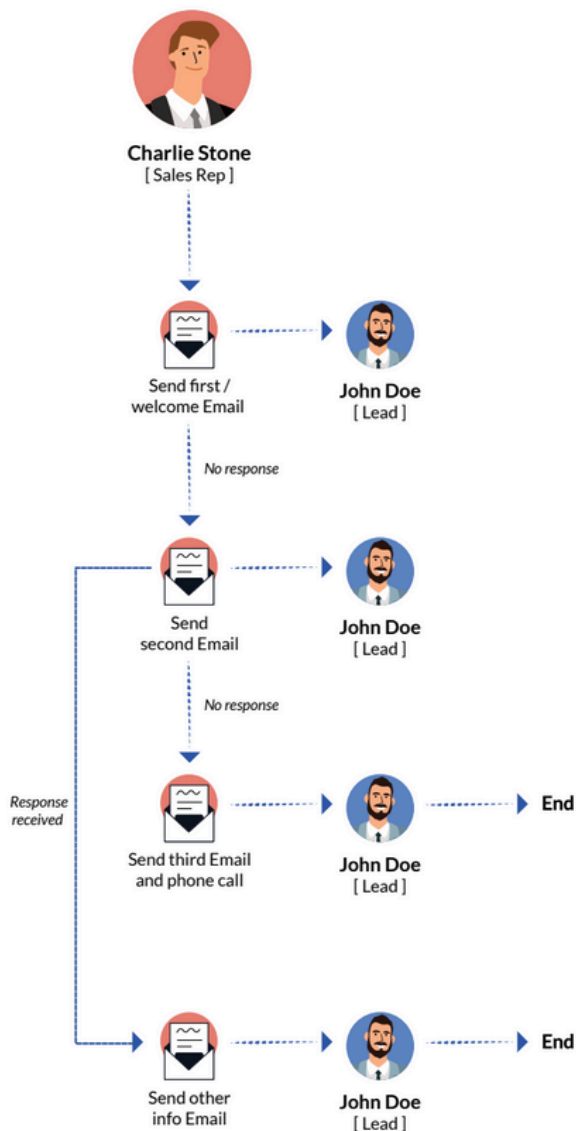




Example of a Pipeline :

- Lead Nurturing Pipeline
- Trx Flow Pipeline
- Client Portfolio Review Pipeline
- Seminar or Webinar Pipeline

A sample flow diagram of a lead follow-up process:

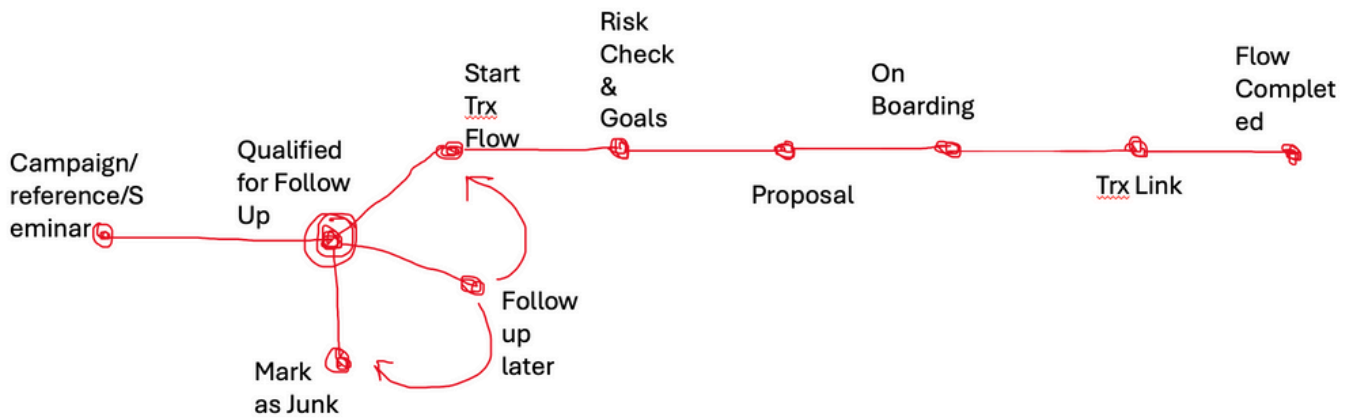


You can create a flow diagram of:

- How you gather and qualify your leads?
- How the leads navigate through your sales pipeline to become customers?
- The follow-up routine for prospects.
- The process for running marketing campaigns.
- The process of receiving payment after deal closure.

Make a list of methods that are used at different stages of the sales funnel, that is from lead capture to deal closure.

Sample flow of a Process Pipeline in MFD Business : Lead to Client Nurturing Flow



While creating your ZOHO CRM Set up , we talk about various stages in every pipeline (FT or NFT)

Stage is like a ‘Station’. Every Stage has to be defined for :

- Max Escalation time on that Stage
- Task or actions required to be performed by the user to move to Next Stage
- Automation and communications required to be sent to after completion of every Stage
 - to RMs , to customers etc

Implementation strategy

Setting up CRM for your company is only finished when the full cycle of planning, implementing, and rolling-out to employees is completed. While companies invest in procuring top-notch CRM systems, they spend less time and resources on implementation. As a result, many companies fail in adopting CRM even though they overcome the initial hurdle of implementing it for their business. We suggest the following best practices which you can follow to achieve a successful implementation:

Planning

Define your business goals and strategies and plan your implementation activities around them.

Analyzing

Confirm your requirements, analyze them, and understand their scope in the CRM environment.

Designing

Review your business process and compare it with the CRM system to align it with your business. Analyze the integrations that are needed and prep your data for the migration.

Validating

Assess the implementation in a test environment by giving your sales team access to the CRM account.

Deploying

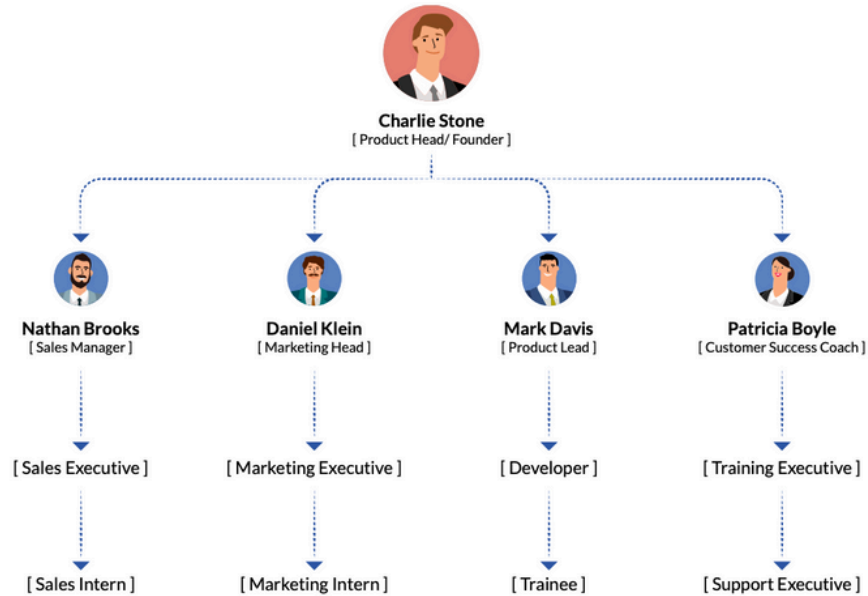
Deploy the CRM. Continue to train your team members with documentations, training materials and other relevant resources. Document their pain points and identify the areas of improvement.



Identify users who will access CRM and set their roles and profiles

Let's look at an example of Zylker, Inc. and its organization's hierarchy.

Sample diagram



Get Started - Register for our first Free Introduction Class :

<https://finnsys.zohobookings.com/#/abhinesh>