Zoho CRM

Account Planning

Account Planning for Zoho CRM

Zoho CRM Extension

ZOHO

User Manual

Version 1.0

Prepared By:

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Dhruvsoft

BUILD • DEPLOY • SUPPORT

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Account Planning for Zoho CRM

1. Overview

Account planning is a strategy to build stronger relationships with key clients and increase sales. It helps businesses grow by focusing on important clients, setting clear goals, and promoting teamwork between sales, marketing, and support teams. **Account Planning for Zoho CRM** is a Zoho CRM Extension developed by Dhruvsoft, a Zoho Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can do Account Planning related activities like - maintain the records of customers' businesses such as SWOT Analysis (strengths, weaknesses, opportunities, threats) details about their company business, and their previous history. The extension helps to develop the strategies and objectives needed to deal with the company/business successfully.

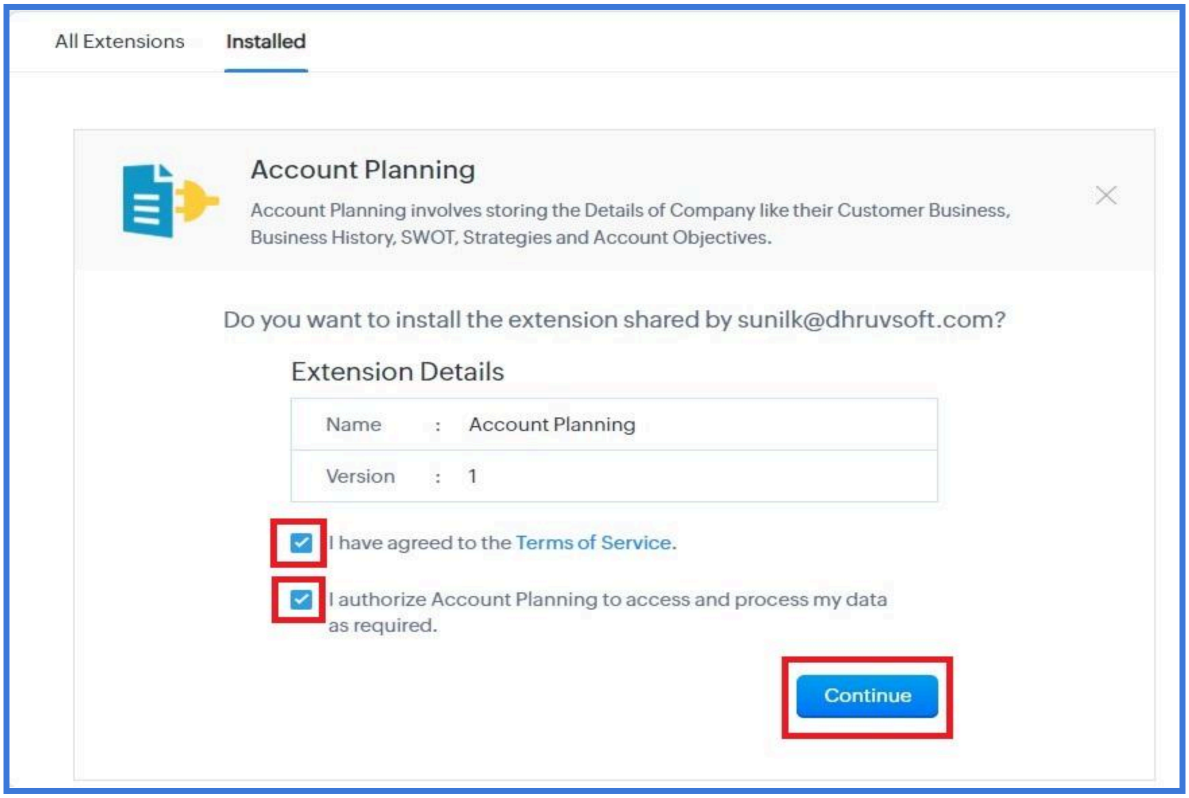
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, and how to configure and use the Account planning within your Zoho CRM account.

1.1 Install the Account Planning Extension

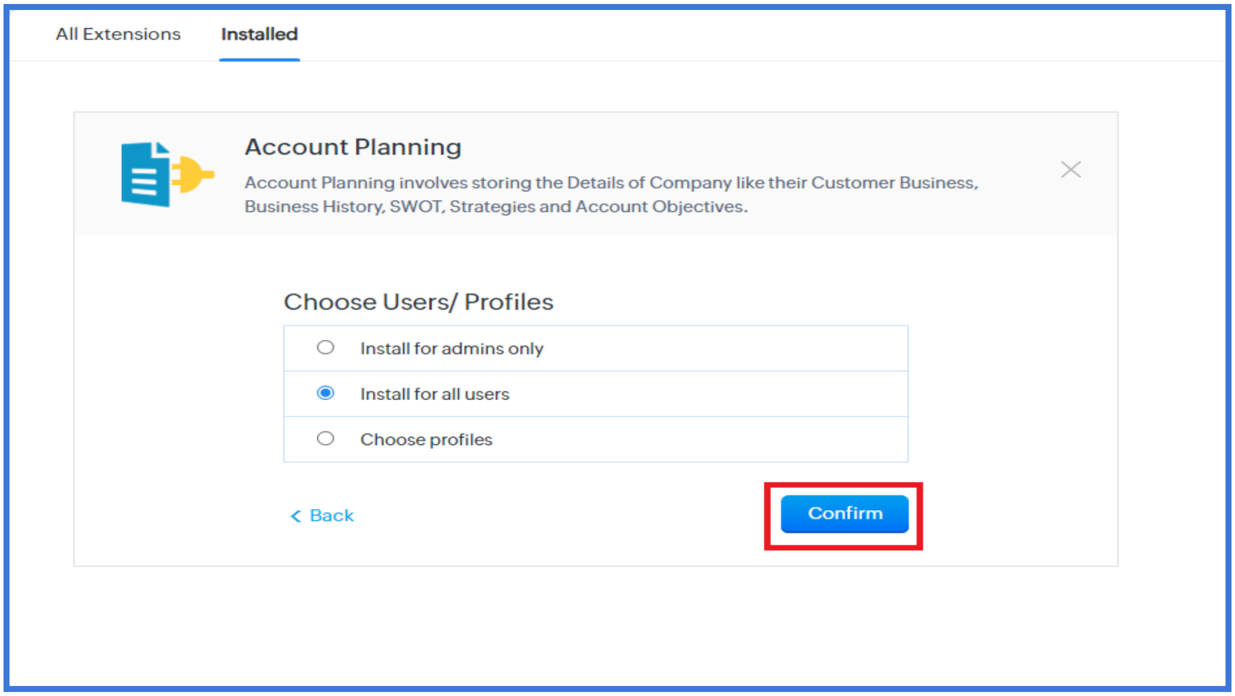
You can go to **Zoho Marketplace** and search for "Account Planning" to locate the extension and install it directly from the Marketplace. Alternatively, you can install the Account Planning extension by logging in to your Zoho CRM account and following the installation instructions below.

To install the Account Planning extension from within Zoho CRM:

- ❖ Go to **Setup** > **Marketplace** > **All**. By default, all the Zoho extensions currently installed within your Zoho CRM account are listed. Go to the "**All Extensions" tab** to view all available extensions.
- ❖ Click **All Extensions,** browse/search for ***Account Planning***, locate (see screenshot below), and then click the extension. The details about the extension will be shown in the screenshot below.



- Click the Install button**.**
- Make sure you check the "Agree to the ***Terms of Service"*** *Boolean* and click **Install**.
- Read the Privacy Declaration and click **"Agree and Continue"**
- Select the users/profiles for which the extension needs to be installed and click "**Confirm".**



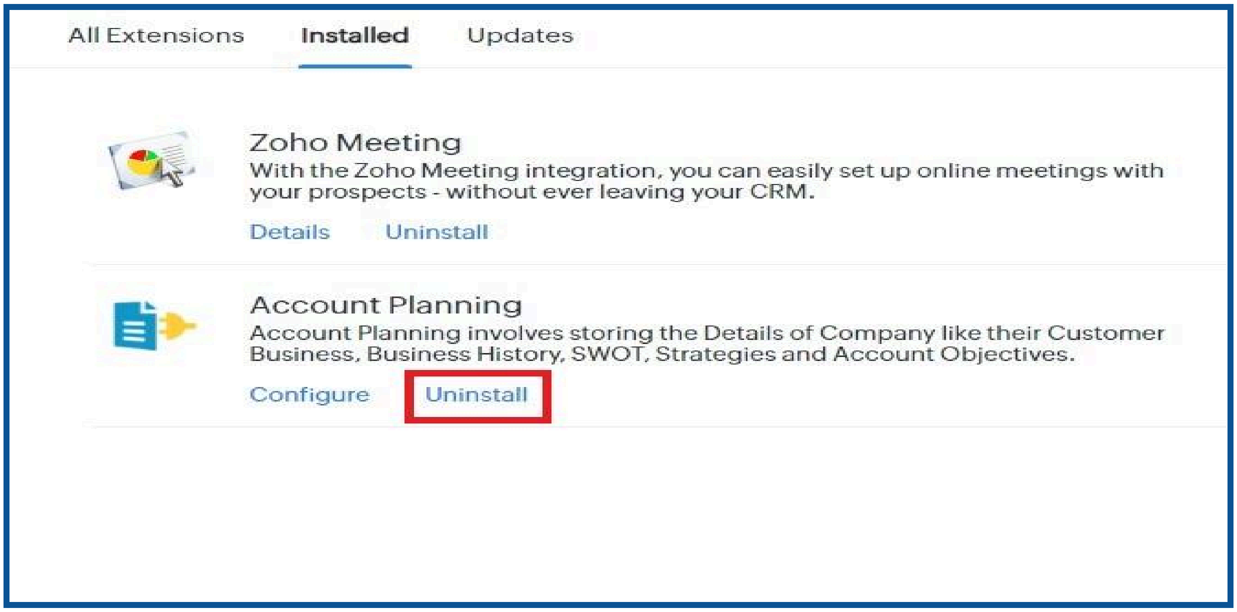
- ❖ After clicking Extension, it will start installing.
- ❖ After successfully installing the Extension then it will show the modules that are present in the Account Planning Extension.

1.2 Uninstall the Account Planning Extension for Zoho CRM

Uninstalling this extension from the Zoho CRM will delete all its associated data.

To uninstall Account Planning Extension, follow the steps below:

- ❖ Go to **Setup** > **Marketplace** > **All** > **Installed** tab. All the installed Extensions will be listed.
- ❖ Browse for **Account Planning Extension** and click on the **Uninstall link.**
- ❖ Click **Okay** to confirm in the following confirmation pop-up. The Extension will be **uninstalled**.

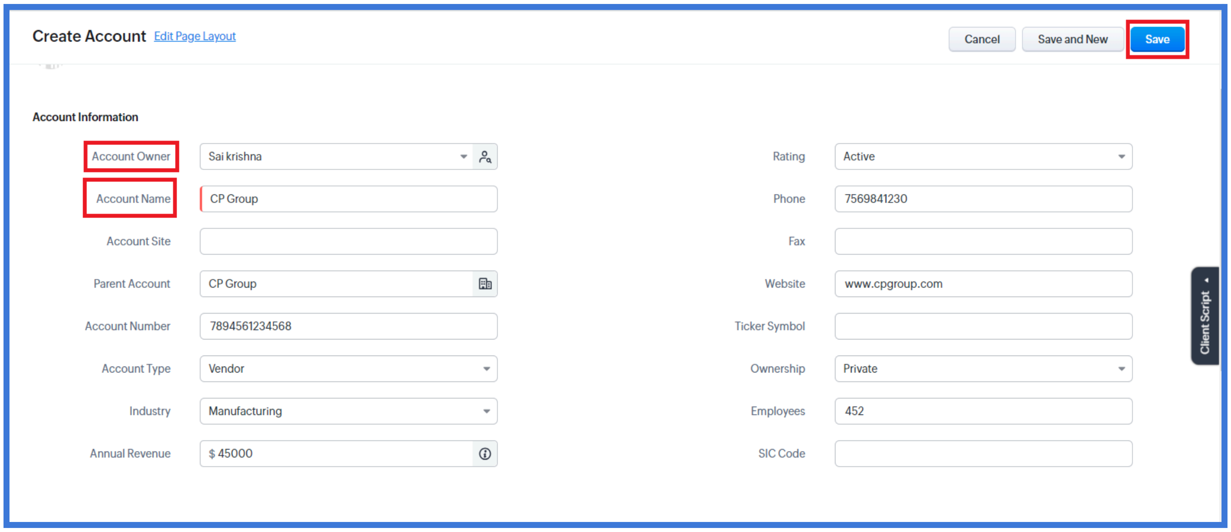


2. Using Account Planning Extension

2.1 Accounts

Creating an Account

- For account creation, you need to fill in all the mandatory fields related to an organization.
- Account Planning involves the following sequence of actions achieved by creating custom modules.
- After Creating an account we can add the above details of the business/organization we want to work with/do business with.
- The Account Planning for Zoho CRM extension adds the following custom modules related to Accounts:
  - **Account Profile**
  - **Engagement History**
  - **SWOT**
  - **Strategies**
  - **Objectives**

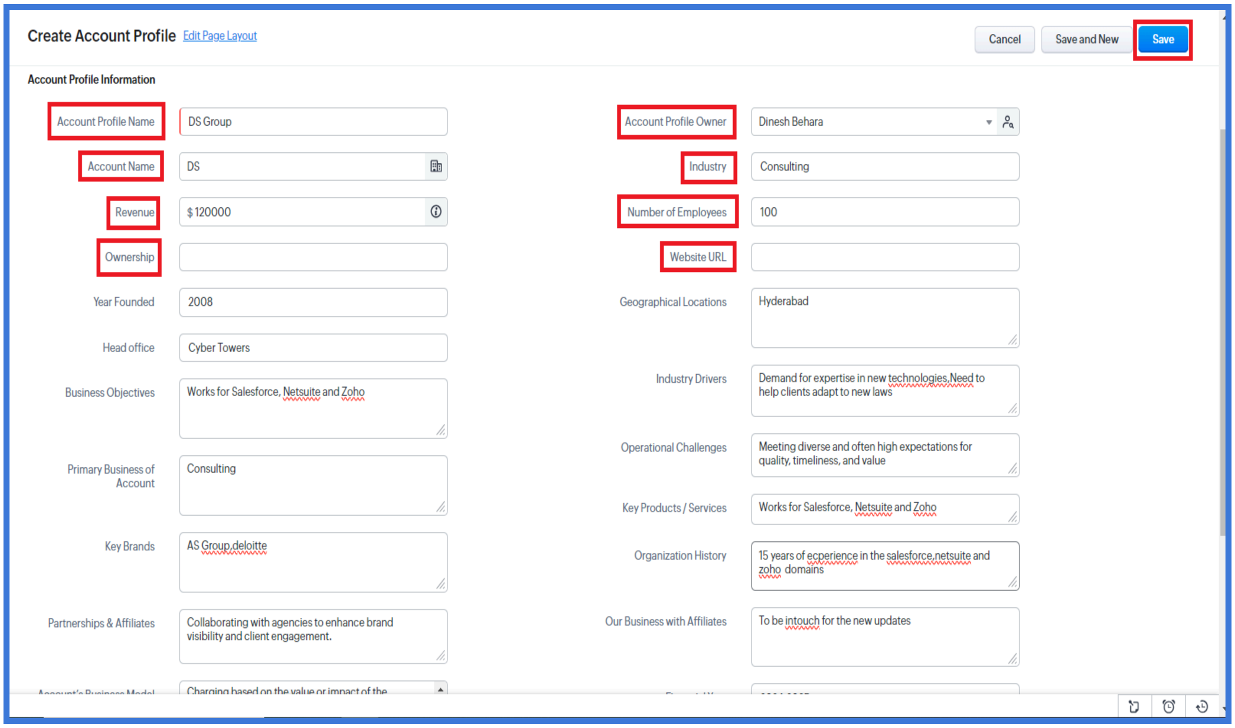


2.2 Account Profile (Custom Module related to Accounts)

- The Account Profile module is a custom module related to accounts that capture information related to the business, such as customers, competitors, the size of the company, etc.
- The record created here will be shown in the related list of accounts.

Creating Account Profile

- Go to the **Account Profile** Module
- Click on **Create Account Profile**
- Fill in all the fields and click on **Save.**



Account Profile Custom Fields

Field Name	Field Type	Description	Mandatory
Account Profile Name	Single Line		Yes
Account Profile Owner	Look Up		Yes
Account	Lookup		Yes
Industry	Single Line	Populated from Accounts	No
Revenue	Currency	Populated from Accounts	No
Number of Employees	Number	Populated from Accounts	No
Ownership	Single Line	Populated from Accounts	No
Website URL	URL	Populated from Accounts	No
Year Founded	Number (4)		No
Geographical Locations	Multiline		No

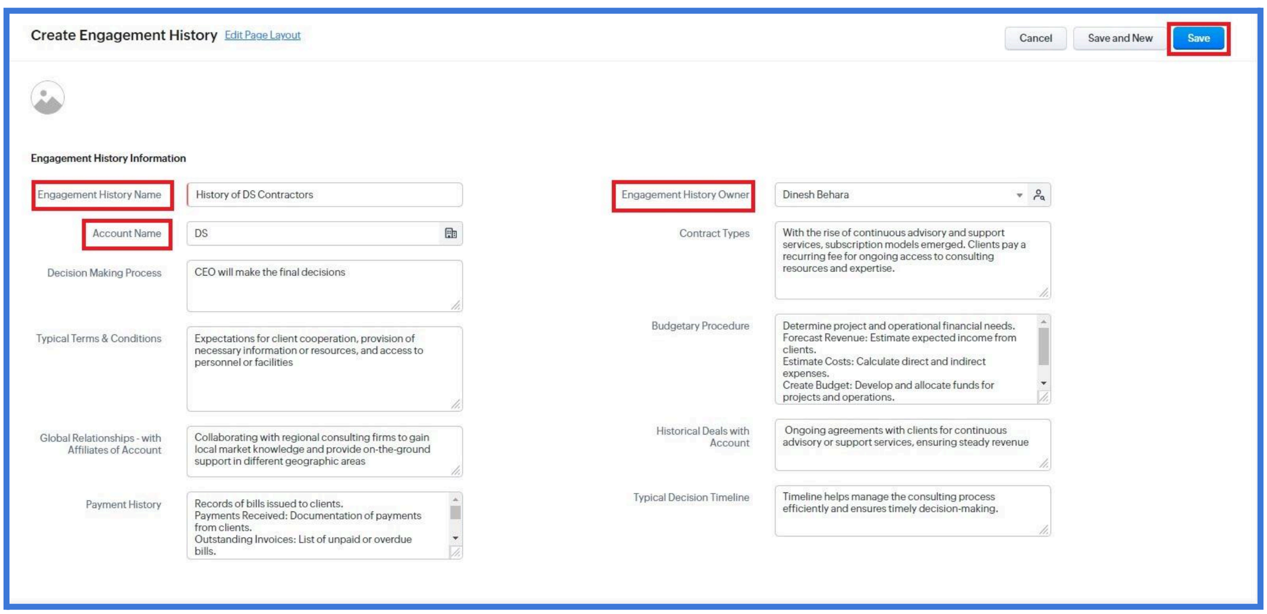
Head office	Single Line		No
Industry Drivers	Multiline		No
Business Objectives	Multiline		No
Operational Challenges	Multiline		No
Primary Business of Account	Multiline		No
Key Products / Services	Multiline		No
Key Brands	Multiline		No
Organization History	Multiline		No
Partnerships & Affiliates	Multiline		No
Our Business with Affiliates	Multiline		No
Financial Status	Single Line		No
Financial Year	Single Line		No
Account's Business Model	Multiline		No
Key Customers of Account	Multiline		No
Key Competitors of Account	Multiline		No
Long-term Business Prospects	Multiline		No
Value Statement	Multiline		No
Additional Notes	Multiline		No

2.3 Engagement History (Custom Module related to Accounts)

- Engagement History is a custom module in accounts that is used to maintain the business history of the company with which we want to do business. It will store the previous company history like their budget procedure, decision process, and global relationships with others these details will be stored in this custom module and will be displayed in a related list of accounts.

Creating Engagement History

- Go to the **Engagement History** Module
- Click on **Create Engagement History**
- Fill in all the fields and click on **Save.**



Engagement History Custom Fields

Field Name	Field Type	Description	Mandatory
Engagement History Name	Single Line		Yes
Engagement History Owner	Lookup		Yes
Account	Lookup		No
Contract Types	Multiline		No

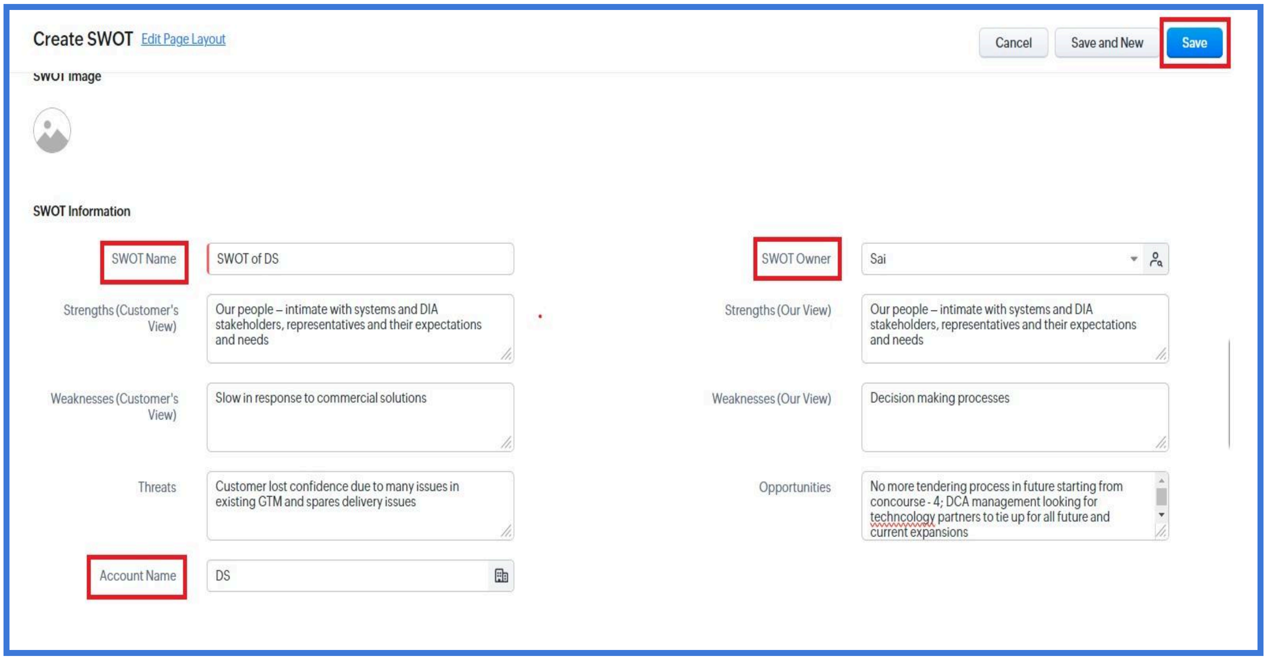
Decision-Making Process	Multiline		No
Budgetary Procedure	Multiline		No
Typical Decision Timeline	Multiline		No
Typical Terms & Conditions	Multiline		No
Historical Deals with Account	Multiline		No
Global Relationships with Affiliates of Account	Multiline		No
Payment History	Multiline		No

2.4 SWOT (Custom Module related to Accounts)

- This module stores an account's strengths, weaknesses, opportunities, and threats related to a particular business.
- It will be shown in the related list of accounts.

Creating a SWOT

- Go to the **SWOT** Module
- Click on **Create a SWOT**
- Fill in all the fields and click on **Save** or **Save and New.**



SWOT Custom Fields

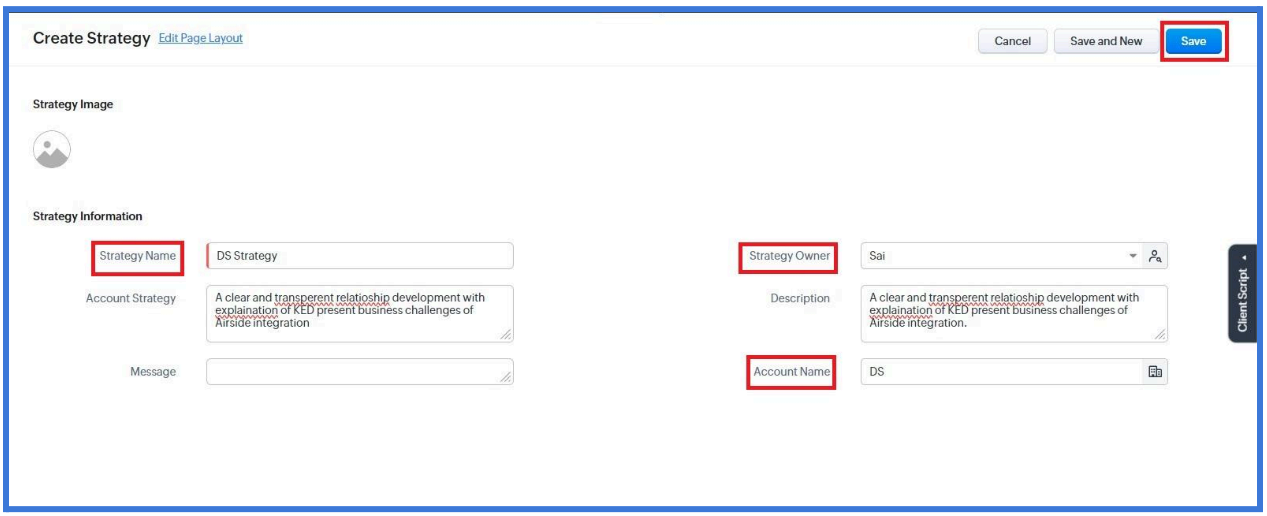
Field Name	Field Type	Description	Mandatory
SWOT Name	Single Line		Yes
SWOT Owner	Lookup		Yes
Account	Lookup		No
Strengths (Our View)	Multiline		No
Strengths (Customer’s View)	Multiline		No
Weaknesses (Our View)	Multiline		No
Weaknesses (Customer’s View)	Multiline		No
Opportunities	Multiline		No
Threats	Multiline		No

2.5 Strategies (Custom Module related to Accounts)

- The strategies module involves developing strategies to do business with the account/customer. It also involves strategies to increase customer interactions and improve business revenue.
- This Custom Module will be shown in a related list of accounts.

Creating a Strategy

- Go to the **Strategy** Module
- Click on **Create a Strategy**
- Fill in all the fields and click on **Save.**

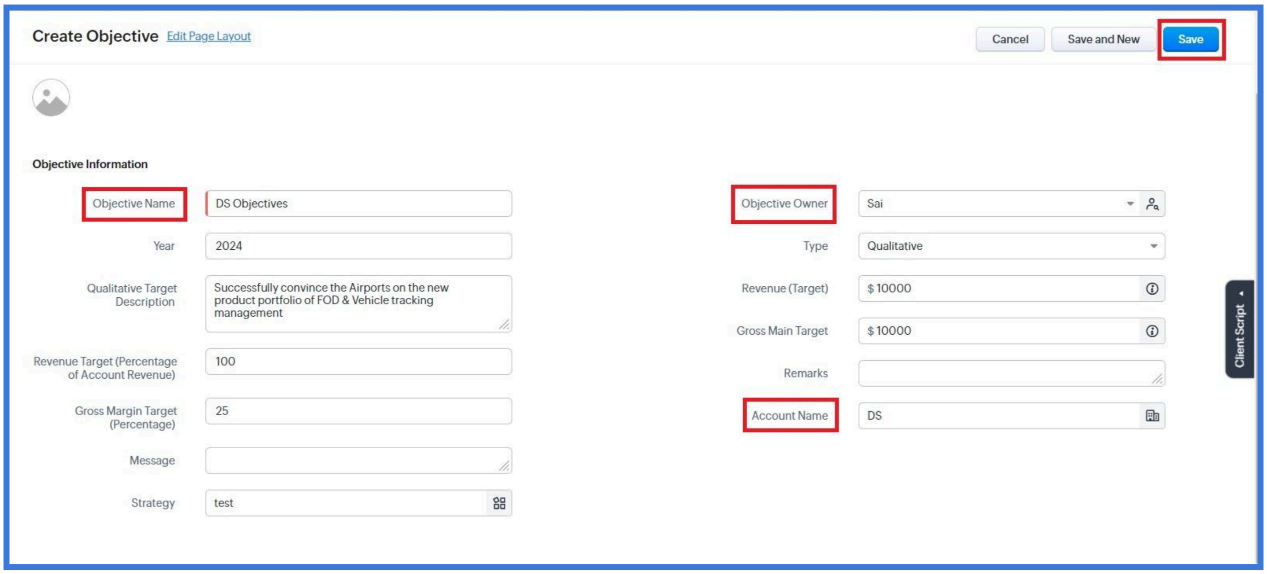


Strategies Custom Fields

Field Name	Field Type	Description	Mandatory
Strategy Name	Single Line		Yes
Strategy Owner	Lookup		Yes
Account	Lookup		Yes
Account Strategy	Multiline		No
Description	Multiline		No

2.6 Objectives (Custom Module Related to Accounts)

- You can define objectives for a particular year by using this module.
- To **Create** a New Objective Go to **Objectives->Create Objective** enter the field details and click on **Save** or **Save and New**



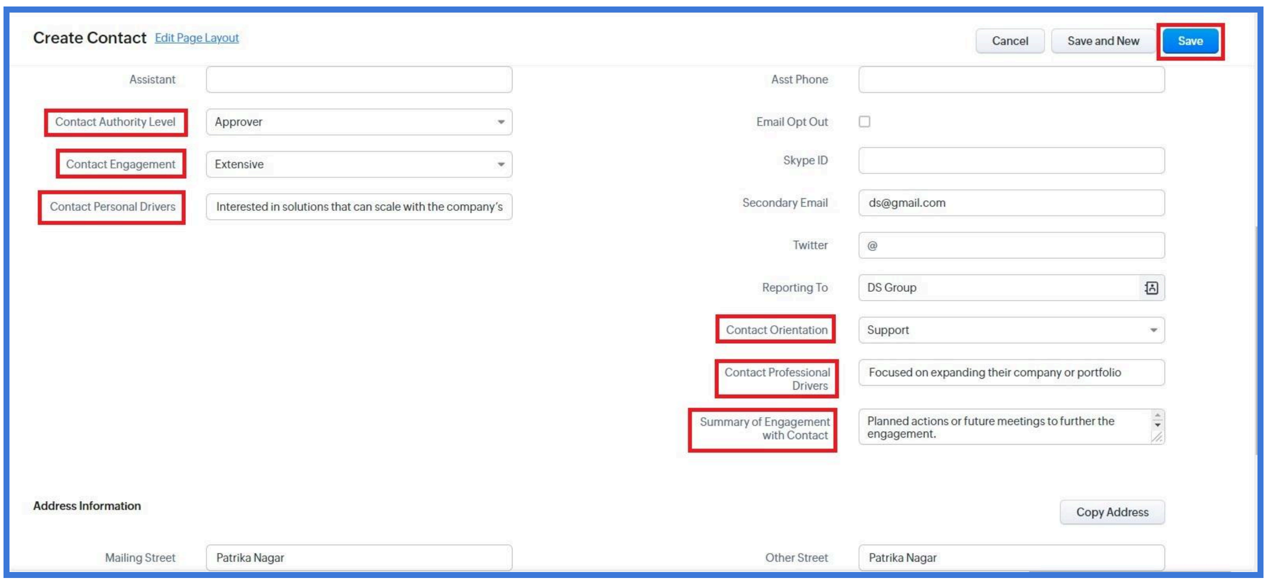
Objective Custom Fields

Field Name	Field Type	Description	Mandatory
Objective Name	Text		Yes
Objective Owner	Look-Up		Yes
Account	Lookup		Yes
Strategy	Lookup		No
Year	Integer		No
Type	Picklist	Qualitative Number	Yes
Qualitative Target Description	Multiline		No
Revenue Target	Currency		No

Revenue Target (Percentage of Account Revenue)	Percentage		No
Gross Margin Target	Currency		No
Gross Margin Target	Percentage		No
Remarks	Multiline		No

2.7 Contacts (Related to Accounts)

- The Contacts module stores personal information of the accounts, including details such as First Name, Last Name, Email, Mobile, etc.
- We have created custom fields within the Contacts module to track the authority of the contacts and to manage driver information, which will aid in effective account planning.



Contacts Custom Fields

Field Name	Field Type	Options	Mandatory
Contact Authority Level	Pick List	• Approver • Decision Maker • Recommender • Influencer • Unknown	No

Contact Orientation	Pick List	● Sponsor ● Support ● Neutral ● Support Competitor ● Sponsors Competitor ● Unknown	No
Contact Engagement	Pick List	● Extensive ● Moderate ● Low ● No Contact	No
Contact Professional Drivers	Text		No
Contact Personal Drivers	Text		No
Summary of Engagement with Contact	Multiline		No

3. Sales Signals in Account Planning

The user will receive real-time notifications for the Account Planning functionality inside the Zoho CRM as Sales Signals. Sales Signal notifications are displayed when you click on the top-right corner of the Zoho CRM home page. The signal will be raised when mandatory fields are left blank or any fields that are to be pre-populated are filled.

4. Support Contact For Account Planning Extension:- Dhruvsoft Services Pvt. Ltd.

Thank you for installing the Account Planning Extension. If you have any questions or are facing any installation issues, please feel free to contact the Dhruvsoft Support Desk for Zoho Extensions via email at support@dhruvsoft.com or call us at (+91 9704056000)

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