

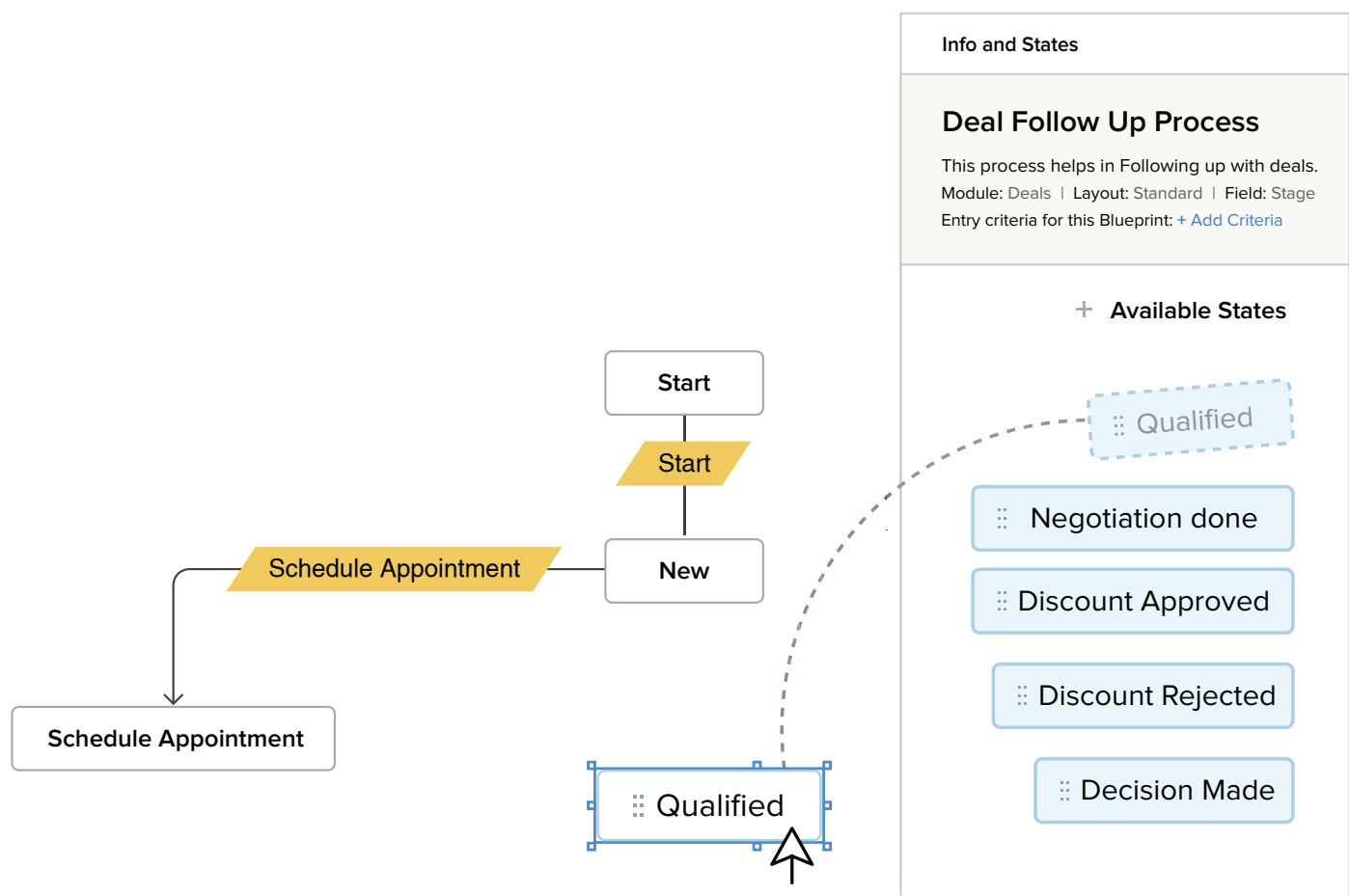


# Design and implement fully complaint sales processes.

Ideal and repeatable sales processes are ones that are perfected over time. What if you could arrive at such a sales process without relying on salespersons to follow the best practices? This is what Zoho CRM's Blueprint is all about.

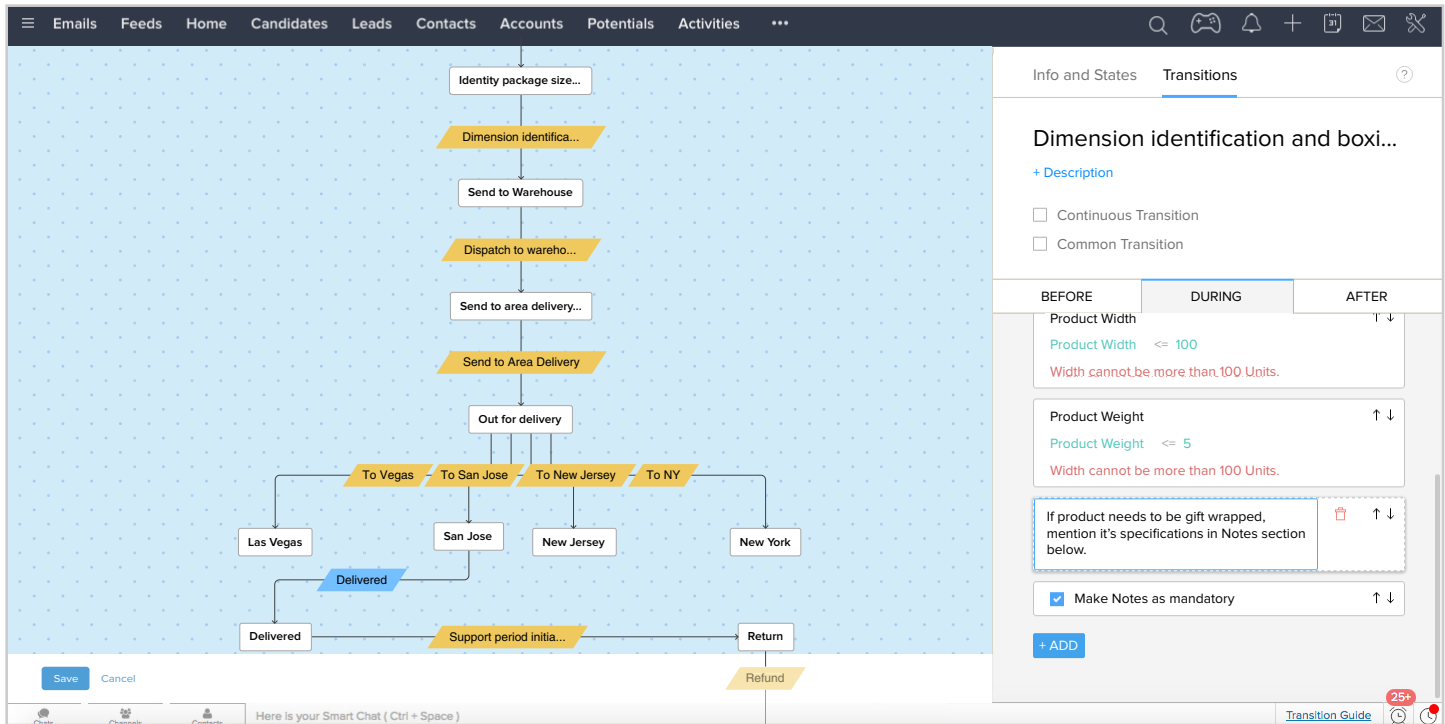
## Create the process in visuals.

Drag and drop elements of your sales process on the Blueprint Canvas to design a pattern. State refers to sales stages and Transition refers to the activities that happen between sales stages. For ex- Qualification is a State and the activities that take it to the next stage, Requirement Gathering is defined by Transition.



## Guide reps all through the way.

When there are many leads to go through everyday, it is highly likely that reps skip stages or find themselves unsure of what they should be doing next. With Blueprint you can set a sales process that make reps complete certain steps in the sequence before they move to the next stage. This way reps are never stuck or unsure of what they should be doing.



## Ensure compliance.

Blueprint not only lets you design sales processes but also ensures that sales teams comply with it. After design, the process is put in place such that there is no bypassing of steps towards deal closure. For ex- If the transition prompts users to write notes after speaking with a prospect, the salesperson must update Notes and only then they can proceed with the next step. This way full compliance with the designed process is ensured.

### Negotiate

Discount % 55

Discount % should be less than 50%.

Closing Date 04/30/2017

Closing date cannot exceed 30 days for deals negotiated

Notes

Customer is low on budget and has requested additional discount.

Cancel

Save

# Automate routine actions.

If you love workflow automation in Zoho CRM, you don't have to miss it with Blueprint. Simply include workflow automation in your sequence. Automate data maintenance, follow-ups, and just about anything you can do with the workflow feature in CRM.

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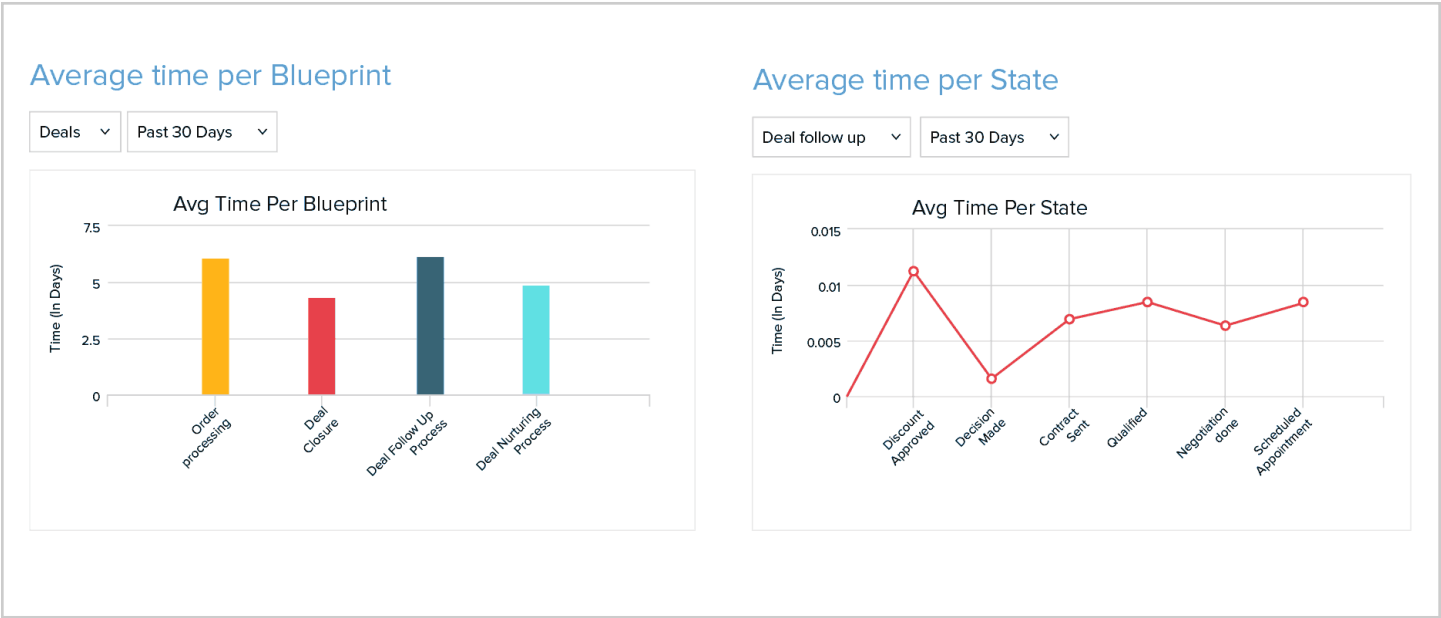
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# Receive Blueprint reports.

Blueprint reports lets you know which sales stages reps have trouble with. This information is useful in modifying processes and changing sales strategies to close deals faster. There is also information about the number of records that enter and exit the Blueprint. The reports are very useful in accessing if a sales processes is really working for you.



# Q & A

## **1. In what edition of CRM is Blueprint available?**

Blueprint is available for Enterprise edition and above.

## **2. Can Blueprint be used with Page Layouts?**

Yes, you can design your sales process around different page layouts in your CRM.

## **3. What is the difference between Blueprint and Workflow automation?**

The two are very different. Workflow automation exists as an individual feature and can also be added to a process you are creating in Blueprint. It deals with actions that is automated when certain criteria is met. Actions that can be triggered via workflow automation includes email alerts, field updates and such.

Blueprint on the other hand is a process creation dashboard where sales processes can be designed and implemented from scratch.

## **4. Can I clone a process that I created in Blueprint?**

At the moment it is not possible. It will be available in the future.

## **5. Can different teams be a part of a single process designed in Blueprint?**

Yes you can include individuals from different teams while choosing transition owners in the 'Before' segment of the Transition.

# Contact us.



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