

INTEGRATING EMAIL MARKETING AND CRM

ZOHO CRM



ZOHO Campaigns

Sales Teams depend on a CRM (Customer Relationship Management) software to manage their company's interaction with leads, prospects and potential customers. Often, we find the Sales team struggling to organize maintain and share data with the Marketing department so that both can update their records simultaneously. In such cases, it becomes important to look for a medium, an application where we can integrate the CRM software with an email marketing solution.

At Zoho, CRM users can easily and effectively integrate with Zoho Campaigns to foster collaboration across the organization and effectively engage the customer at every stage of the experience, from marketing to sales. By integrating with Zoho Campaigns, our CRM users receive insight on marketing related status and are able to create more effective, targeted and automated email marketing campaigns.

Let us take a more detailed look on why you need to integrate your Zoho CRM account with Zoho Campaigns.

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Why Zoho CRM with Zoho Campaigns?

Up-to-date Customer Information - You can sync your CRM leads/potentials to Campaigns. By utilizing the segmentation features available in Campaigns you are then able to easily organize your customer base into smaller groups called Segments. This gives you the flexibility to create customized emails for various set of contacts and maximize the impact of your email campaigns across the board.

Automatic Updates with Opt-in/Opt-out Preferences – Apart from the automatic sync of contacts, Zoho Campaigns allows you to leverage CRM information such as converted leads related information, email opt-outs (unsubscribes), deleted contacts and allows you to fine tune your email campaign to your target audience's preference.

Track Email Subscribers Activity from CRM – You can push information from Campaigns such as opens, clicks and bounce data to the text area field of every record in the contacts or leads module of CRM. Later, you can create a view in your CRM account and filter these leads/contacts on the basis of Campaigns' status.

View Campaign Reports from CRM - You can view detailed stats and real time reports of sent campaigns from the **Campaigns** module of their CRM account.

View Email Content from CRM – You can view the email campaigns sent and review the content of the email from the Campaigns module of your CRM account.

Move subscribers to CRM – In case you have created new contacts in Zoho Campaigns, you can move these contacts to CRM either as Leads or Contacts. The functionality ensures end to end collaboration between sales and marketing as well as maintaining coherence of data.

Integrating CRM with Campaigns

Tim runs a coffee bean import-and-distribution company. Recently, he attended a trade show and during the course of the day he noted down the contact details of people who visited his stand and expressed their interest in his products. These people are from restaurant or cafe owners. He submits all of these contacts into Zoho CRM as Leads.

Now, Tim integrates his CRM account with Zoho Campaigns and syncs his entire leads to Zoho Campaigns account. To explain about the product offering to know their interest, Tim starts sending email campaigns to these leads via Zoho Campaigns. Using the Push Member Status which is an automated process, these leads' activities such as opens and clicks are pushed to a text area field in CRM. Based on recipient (lead) activities, leads are converted into an Account (e.g. Barnabo Beans Cafe), a Contact (e.g. Jane Doe) and a Potential (e.g. 50 x 1kg Bags Jamaican Coffee beans).

Now his focus switches to the Potential who is the center of his sales process. He needs to baseline his activities/tasks/quotes etc. around this Potential. At the same time, he also creates an Autoresponder message under Autoresponders tab in Zoho Campaigns and creates a mailing list to which these Potentials from CRM can be imported. Now, these Potentials are synced to the mailing list in Zoho Campaigns and we have a series of Autoresponders waiting to be sent.

Once the Autoresponder is activated, the potentials will start getting a series of emails. Now, Tim can watch his potentials based on email campaign's status such as open, click, subscribe and other related status (es) from the Campaigns tab of his Zoho CRM accounts and find the ways to close the deal based on the Potential's behavior.

Feel free to share this document.



You can find more details and step-by-step instructions on our [Online Help](#).

Visit www.zoho.com/campaigns to sign up for a free account!

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