

ZOHO CRM Audit Performance Report
for
ABC Company.

The report was made by:.....

date:.....

Description of activities:

1. Technical review of the CRM application

During this process we will check:

- security (roles, profiles, access to products, modules, etc.);
- modules (leads, contacts, organizations, and 2 additional modules according to the client's specificity);
- relations between modules (data flow and their updating, eg whether sales orders gets the client's data, etc.);
- code quality metrics;
- that CRM does not contain redundant functions and that the workflow settings run smoothly.

2. Software license audit

We check the use of owned licenses. Thanks to this you will learn:

- whether all possible functions are used in 100%
- what is profitable: whether to stay on the current version of the system, choose a package, or buy additional applications?
- how many CRM licenses you are using – empty licenses detecting.

3. The sales process review

During this process:

- We analyze website forms, lead sources, conversion; e-mail templates and product catalogs, sales modules, opportunities, and offers.
- We adjust the main page of the CRM application and optimize the timeliness of reports and dashboards to the current sales process.

Technical review of the CRM application

Area to improve	Conclusions	Other comments
-	-	-
-	-	-
-	-	-

Software license audit

Area to improve	Conclusions	Other comments
-	-	-
-	-	-
-	-	-

The sales process review

Area to improve	Conclusions	Other comments
-	-	-
-	-	-
-	-	-