ZOHO CRM Audit Performance Report
for
ABC Company

The report was made by:...

date:...

Description of activities:

Technical review of your CRM

During this process we will:

- verify security settings (roles, profiles, access to products, modules, etc.);
- review modules (leads, contacts, companies and 2 additional modules selected by you);
- check relationships between modules (appropriate data flow and update, e.g. whether sales orders download contractor data, etc.);
- perform a code review of custom functions;
- check if CRM does not contain redundant features and that workflow settings work smoothly.

Software license audit

- We will check the usage of existing licenses. Thanks to this you will ensure that you are making optimal use of all possible functions.
- We will help you decide is it worth staying on the current version of the system, or is it better to choose a bundle or purchase additional applications or upgrade current modules?
- Are there so-called "empty licenses"? The ones that you pay for and no one uses them?

Sales process overview.

We will analyze forms on the website, sources of leads, lead conversion scheme; e-mail templates and product catalogs as well as sales opportunities and offers module.

We will also setup the main page of the CRM application, optimize the timeliness of reports and dashboards to match current optimized 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
- - -	- - -	- - -