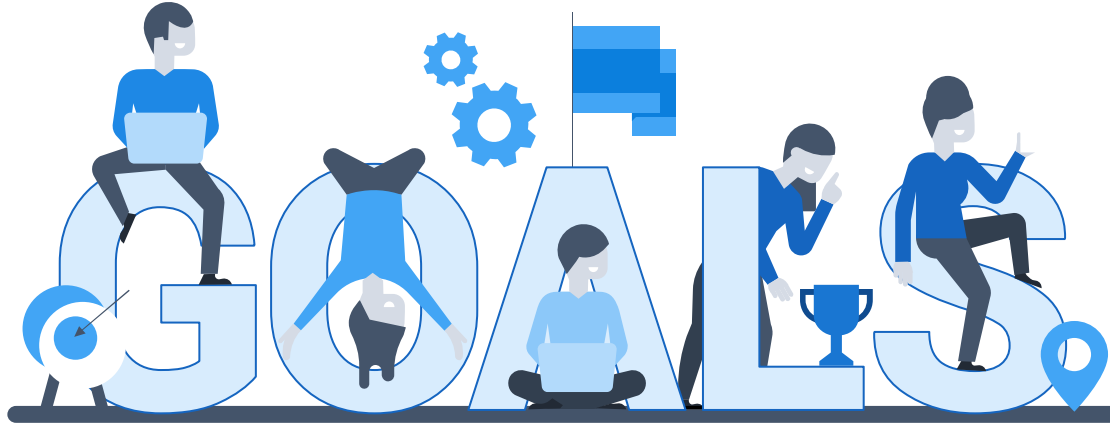# Catalyst Connect

Create | Automate | Optimize

Helping organizations take an inventive approach to effective, efficient, impactful work

Catalyst Connect

Today's Agenda

Thought Leadership Series

How To Achieve Successful Zoho Implementations Through Business Process Mapping and Planning

Tools & Resources

Building Diagrams & Project Plans

Business Process Mapping

Client Onboarding

Introductions

Presented by

Catalyst Connect

Panelists

John-Mark Bantock

Susan Clark

Brett Martin

Vinu Rajendran

What is business process mapping and why is it important?

Get Organized

WHAT IF

BEING DISORGANIZED WAS REALLY THE ANSWER

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Expectations **Management**

- ✓ How do you define a win
- ✓ Point of contact
- ✓ Communication Channels
- ✓ Timelines
- ✓ Budgets

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WORKFLOW

| Intro call with Catalyst Connect | Technical Sales Call & high level review or current tech | Customer Signs Service Agreement & Funds Retainer | Introduction to Solution Architect |

| Kickoff Call, Full Reverse Demo | JM & CJ Review Intake | Client Fills out Intake | Solution Architech Intake meeting (15 min) |

| Schedule Follow up Department Interviews as Needed | CJ Drafts PP | JM Reviews PP with CJ | Draft 1 Presented to Client |

| PM Assigned & Brought up to Speed | SOW Signed | Final PP Presented | Feedback from Client |

| PM Build out Work Orders | Project Kickoff & Introduce Client to PM. PM Reviews Portal Project | Work Order Executed | Internal QC, PM present to CJ, JM or Jenna outcomes |

| 90% Completion Handoff | Incorporate Feedback | Feedback Provided by Client | Run-through with Client |

| Client Performs Run-through with Beta Testers | Final Feedback Incorporated | Training for Client Team | Data Migration/Launch |

Client Onboarding

Getting to know your clients

Discover where you want to go

Plan for Outcomes

Build systems to create replicable results

Implement changes by getting buyin at all levels

Synthesize results and make adjustments
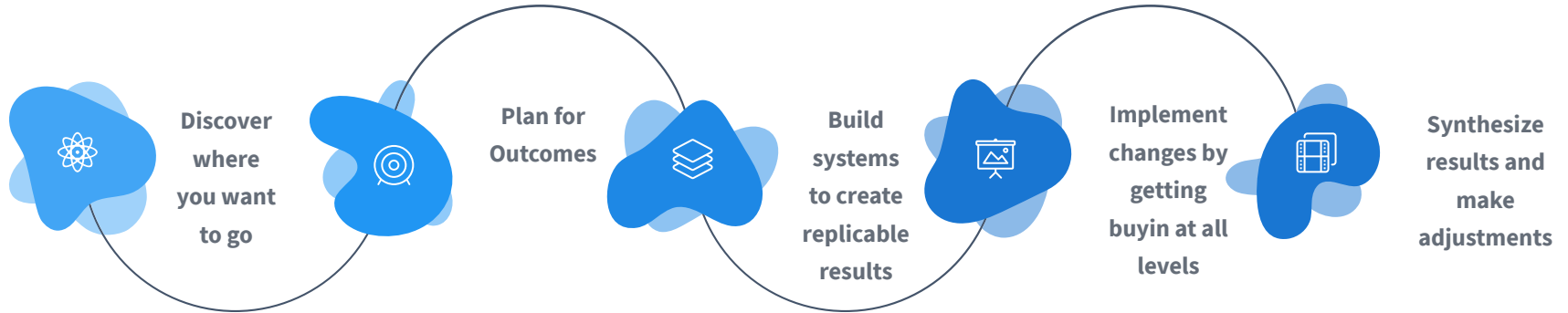
Client **Onboarding -**
Stakeholder interviews

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John-Mark Bantock ▾

Intake & Planning	Quotes	Projects	Billing	Learning & Courses

👤 Org Profile

🔲 Brand Guidlines

🔧 Customer Lifecycle

📘 **Business overview**
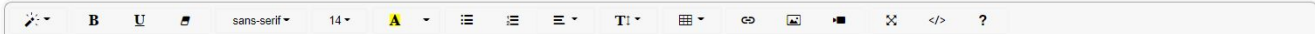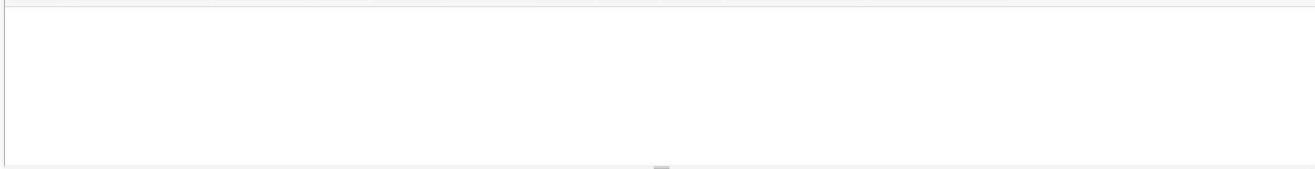
📘 Business Plan

🔀 Diagrams

📗 Docs

👥 User & Permissions

📙 CRM

🔴 Books

📙 Inventory

📣 Campaings

🎯 Sales IQ

🔗 Social

🖼 Website

① Overview — ② Personnel — ③ Marketing — ④ Sales — ⑤ Operations — ⑥ Accounting — ⑦ Support — ⑧ Migration

Video link

https://www.youtube.com/embed/videoseries?v=k1H2hdfZiSM&list=PLAyUyBYL7uxO-avkOvibAwvjqrcvoNNse&index=21&t=2s

How many people are in your organization? How many of these employees do you anticipate using a Zoho product? 🔵   🎤

| B | U | 🅰 | sans-serif ▾ | 14 ▾ | **A** ▾ | ☰ | ☷ | ☰ ▾ | T! ▾ | ▦ ▾ | 🔗 | 🖼 | ▪ | ✕ | </> | ? |

How is your organization structured? Please upload an org chart if you have one.   🛟

A Picture is Worth a Thousand Words

Map Your Software

It is important to understand which software platforms and apps your organization is using to understand how data or processes move from app to app.

Process Mapping

Process mapping can help all stakeholders get on the same page, identify bottlenecks and rank priorities when it comes to automation.

Strike a Balance

Be careful not to go overboard. It is easy to get buried in detail and lose sight of overall objectives. Each diagram should be digestible in a few minutes.

Entity Relationship

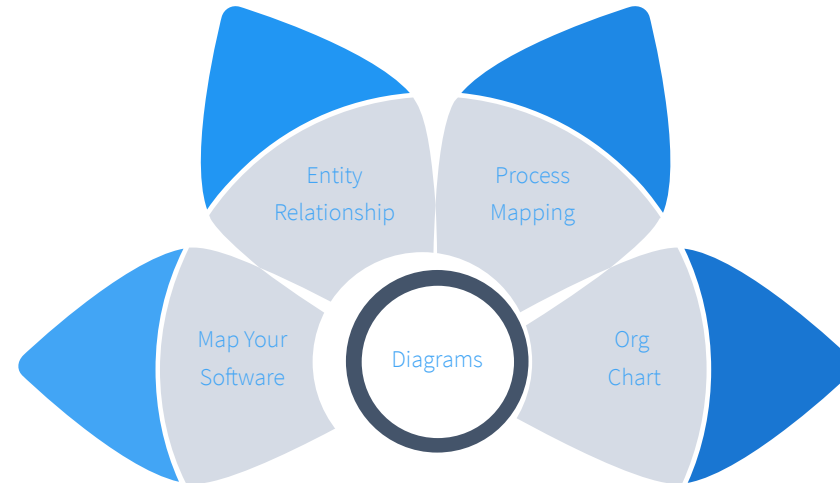Map out your modules and understand how data is related within the CRM and to other Zoho apps.

Org Chart

Having an Org chart can help when defining Roles and Profiles to discuss security and data access permissions.

ER **Diagram**

- Sometimes simplicity is best, understand big picture. Get clients to think in terms of data

- Helps understand what information needs one to one or many to many relationships

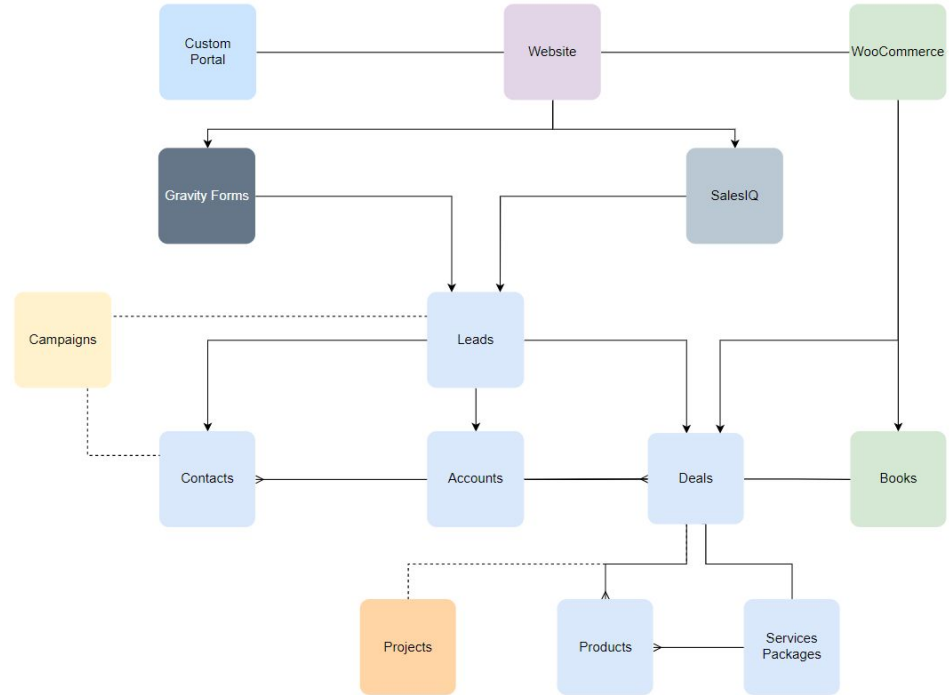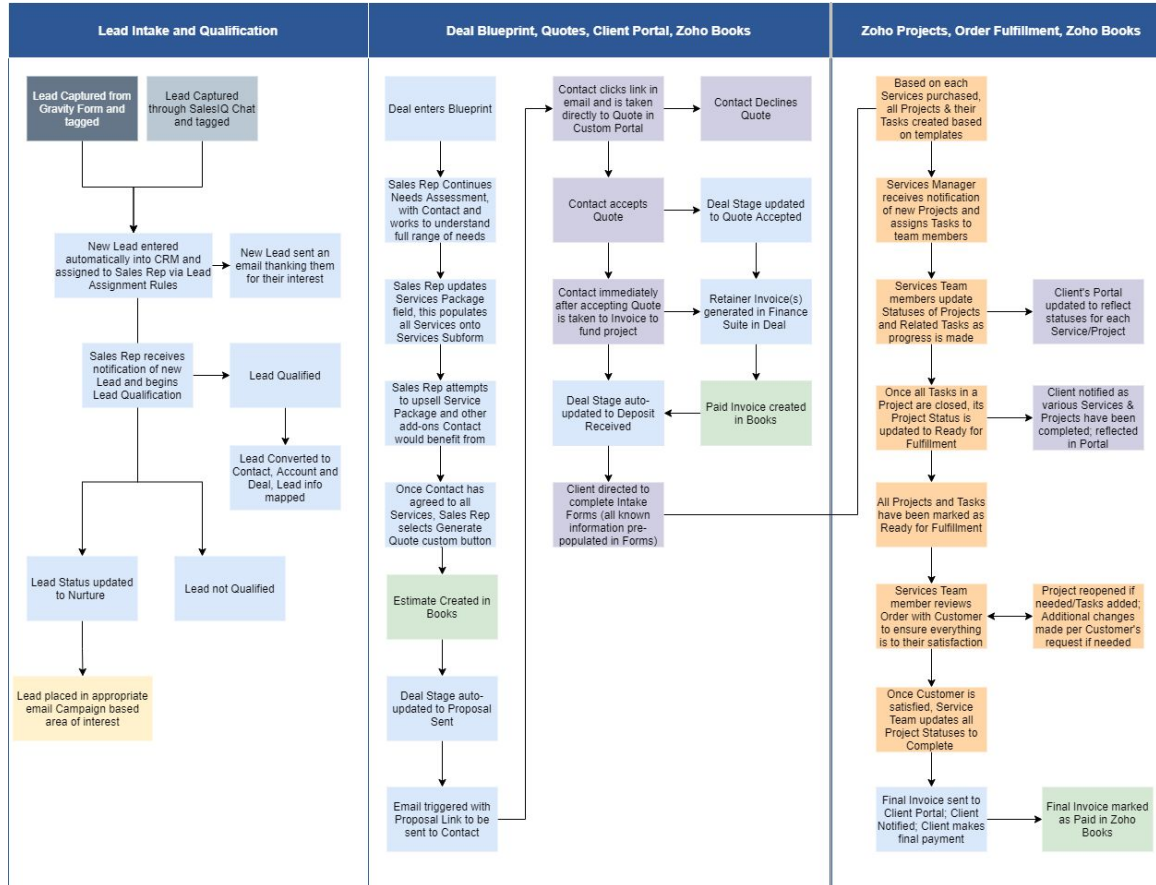- Mitigates the risk of needing to redesign systems in the future

- Helps identify reporting gaps in data relationships for reporting purposes or custom functions

- Build with intention - be proactive instead of reactive

Workflow Diagram

Lead Intake and Qualification

Lead Captured from Gravity Form and tagged

Lead Captured through SalesIQ Chat and tagged

New Lead entered automatically into CRM and assigned to Sales Rep via Lead Assignment Rules

New Lead sent an email thanking them for their interest

Sales Rep receives notification of new Lead and begins Lead Qualification

Lead Qualified

Lead Converted to Contact, Account and Deal, Lead info mapped

Lead Status updated to Nurture

Lead not Qualified

Lead placed in appropriate email Campaign based area of interest

Deal Blueprint, Quotes, Client Portal, Zoho Books

Deal enters Blueprint

Sales Rep Continues Needs Assessment, with Contact and works to understand full range of needs

Sales Rep updates Services Package field, this populates all Services onto Services Subform

Sales Rep attempts to upsell Service Package and other add-ons Contact would benefit from

Once Contact has agreed to all Services, Sales Rep selects Generate Quote custom button

Estimate Created in Books

Deal Stage auto-updated to Proposal Sent

Email triggered with Proposal Link to be sent to Contact

Contact clicks link in email and is taken directly to Quote in Custom Portal

Contact Declines Quote

Contact accepts Quote

Deal Stage updated to Quote Accepted

Contact immediately after accepting Quote is taken to Invoice to fund project

Retainer Invoice(s) generated in Finance Suite in Deal

Deal Stage auto-updated to Deposit Received

Paid Invoice created in Books

Client directed to complete Intake Forms (all known information pre-populated in Forms)

Zoho Projects, Order Fulfillment, Zoho Books

Based on each Services purchased, all Projects & their Tasks created based on templates

Services Manager receives notification of new Projects and assigns Tasks to team members

Services Team members update Statuses of Projects and Related Tasks as progress is made

Client's Portal updated to reflect statuses for each Service/Project

Once all Tasks in a Project are closed, its Project Status is updated to Ready for Fulfillment

Client notified as various Services & Projects have been completed; reflected in Portal

All Projects and Tasks have been marked as Ready for Fulfillment

Services Team member reviews Order with Customer to ensure everything is to their satisfaction

Project reopened if needed/Tasks added; Additional changes made per Customer's request if needed

Once Customer is satisfied, Service Team updates all Project Statuses to Complete

Final Invoice sent to Client Portal; Client Notified; Client makes final payment

Final Invoice marked as Paid in Zoho Books

- Understand their process
- Get a consensus from stakeholders
- Discuss department handoffs
- Identify bottlenecks
- Identify automation opportunities

Stage & Status **Mapping**

- Understand the synchronicity of manual and automated actions in pursuit of furthering the Process

- Bottle Neck Analysis

- Balance simplicity and and function

- Help identify breakdown in processes

- Tell me more...Ask Why

Lead Qualification		
User Actions	**Status**	**System Automation(s)**
Sales Reps will monitor their home dashboard for New Leads and get an email when a lead has been assigned to them	New Lead	If generated from Website a thank you for contacting us email is sent to the lead from hello@catalystconnect
		Lead Assigned to marketing department via assignment rules and Task Assigned to owner to Qualify Lead and Setup a Phone call, Due in 1 Day
		Email Drip Sequence started out of CRM
Sales Rep will search the system for existing records or points of contact that may be connected with the lead, they will then use the data enrichment add on in Zoho CRM to help fill out the lead's information, identify where the lead came from and be sure to update the campaign Lookup if needed. Rep will reach out to the Lead with an initial Phone Call, Voice Message and Email. If further Qualification is needed rep will update the Field "Next Step". If the Lead is qualified then the lead will be converted and a deal created. If an account exists merge the lead into the account and create a new deal.	Qualifying	Zia - Data Enrichment, needs to be triggered by user
		Email Drip Sequence continues out of CRM
		Calls and Email Automatically Logged - Must be initiated through the CRM or a connected App/ Service
Lead Owner Marks the Lead Status as Not Qualified and provides any relevant feedback to marketing via the Field "Lead Status Notes"	Not Qualified	Email Drip Sequence continues out of CRM
Lead has identified that timing is not right and they would like to speak again in the future	Contact in Future	
Nurture	Nurture	The Lead is pushed to a Nurture list in Zoho Campaigns for drip Email Marketing
Once your manual outreach attempts have yielded no results and you do not wish to nurture	Dead	NA
Do not delete Junk leads from the system, it is important to know which Marketing Campaigns or Channels are creating the most junk leads.	Junk Lead	Junk Lead

Tech **Ecosystem**

- Opportunity to consolidate to Zoho One

- No Overlapping functionality

- Onboarding and user Access to Apps

- Big Picture - Everyone on the same page

- Identify connectivity gaps
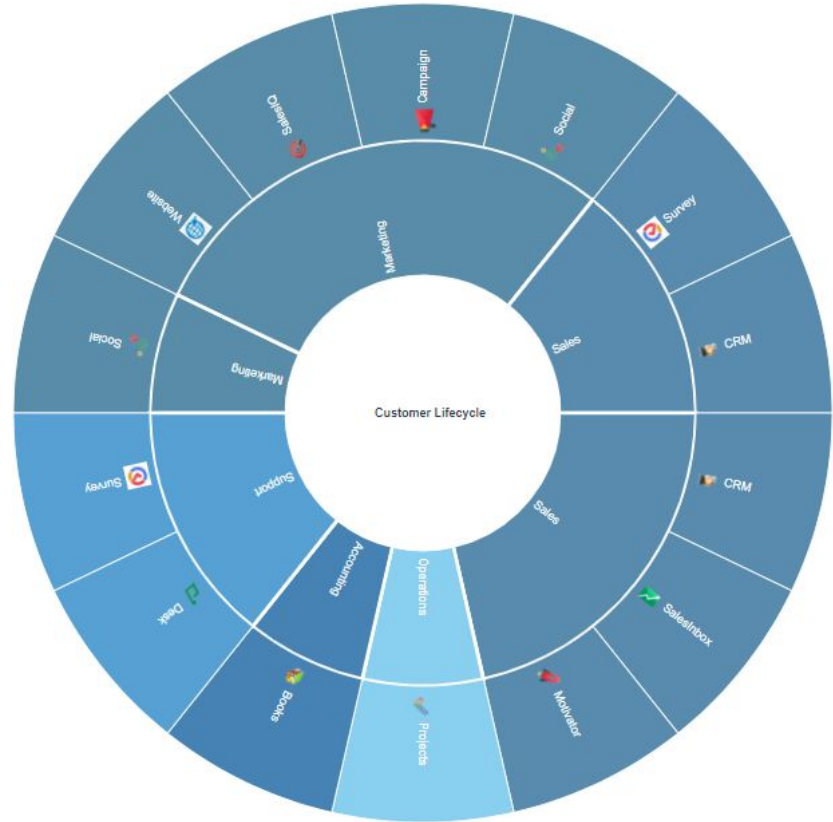
Catalyst Business **Process App**

(Closed beta - Get on the list)

Business Plan

Design, Implementation, Automation

Business plan tool to document your strategic approach. This is accompanied by a business process mapping section.

Stakeholder Interviews

Thought Leadership, Best Practice, Scalability

Get up to speed efficiently and ensure you and your client's team is on the same page.

### Diagraming

ER | Workflow | Systems and Technology

A picture is worth a thousand words. Document data flows and process for quick reference.

Templates & Marketplace

Productize your Intellectual property

Build and distribute business plans, processes and diagrams to jump start implementations or scale your business.

Business Process

Business Plan

BPA

Measure what matters

Intake Interviews
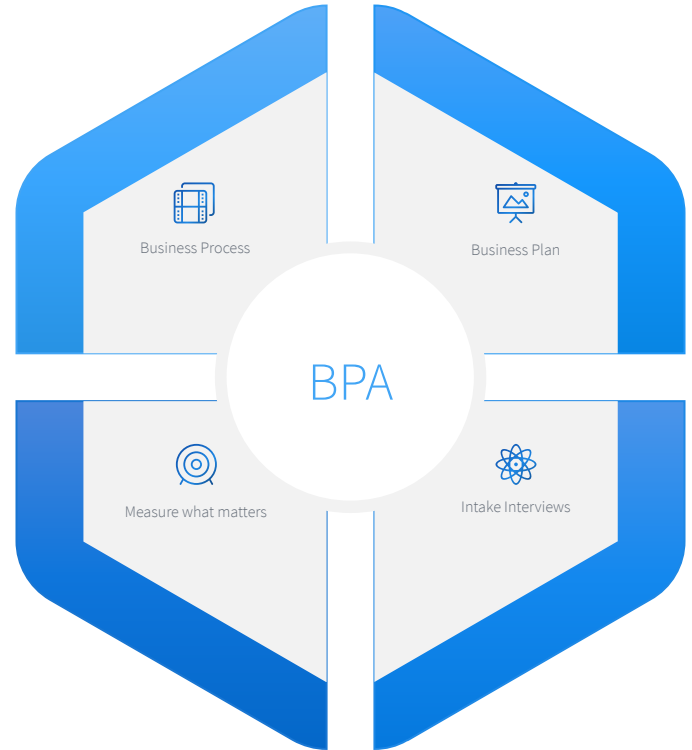
hello@catalystconnect.com

Slides/ Recording / Beta Access go to:

www.catalystconnect.com/bpa