



# Business Expansion Service Uses Zoho CRM To Orchestrate Its Sales Process

Marieta,  
Finance and Reporting Manager, YEM



INDUSTRY TYPE

Import-Export

EMPLOYEES

Below 50

TYPE OF BUSINESS

Privately held

Features that helped us

Sales Pipeline

Dashboard

Email Automation

Audit logs

## About YEM

Established with the mission to be the fastest and most sustainable way to sell products in

Southeast Asia, [Your Export Manager](#) (YEM) helps its clients penetrate new markets, increase export activity, and forge business relationships in Southeast Asia. The company develops and executes marketing strategies to enhance brand identities in new markets. All commercial activities are constantly analysed by chief operating officers, country managers, and pre- and after-sales managers, who conduct over 500 meetings and manage 2,000 sales opportunities every month to help increase brand awareness.

Founded in Italy in 2012 serving just three manufacturers, YEM is a plug-and-play sales network that has now expanded its services to more than 30 manufacturers in Europe and America within 10 years. YEM operates as an extension of the sales team, aiming to provide support and expertise in all critical stages of the sales cycle. It engages potential customers not only through different marketing, communication, and promotion campaigns, but also through local meetings, presentations, and training sessions.

"We do business development for brands who have never really operated in Southeast Asian market, where we represent them legally and commercially," says Marieta, finance and reporting manager of YEM.



"Zoho has demonstrated stability and data consistency, two key factors for instilling confidence throughout our organization. With Zoho, we have business tools to control and manage our daily operations, and solid technical support through online chat, forums, posts, and emails. We always get quick responses to any questions or technical difficulties."

Daniel,  
CTO, YEM

## Challenges

### Streamlining the follow-up process & tracking the sales pipeline

Though Franco Pesci, CEO and founder of YEM, started with three manufacturers, he was set

on further expanding YEM's operations worldwide. Given the scope and volume of his business targets, he was certain it would be impossible to track it all using Excel spreadsheets; what he needed was a system to create meetings and tasks, ensure timely follow-ups, and manage the pipeline.

"Due to the nature of our business, our sales cycle is quite long," Marieta says, noting that many of YEM's deals span months or years. "If we do not have an effective tool for following up and tracking the pipeline this month and next month, we would never be able to work efficiently—never, ever."

## **Centralized data and easy accessibility**

Planning the expansion made YEM's management realize the importance of having a CRM solution that would enable them to store their business data in one place and make it accessible at any point in time. Because the business requires its sales team to engage with the potential customers locally, they needed the ability to retrieve and update customer details anytime, anyplace, and using any device.

"As an organization that has worked with Zoho for six years," Marieta says, "we're delighted that part of our success is due to all of our data being in one place and easily accessible at any point in time."

## **Reporting and analysis**

YEM's growth resulted in an expansion of the sales team into seven additional areas across the Asian market. This triggered the need to manage and keep track of sales activity without actually having to travel.

"Because we have people working in different locations, it is not easy for us to go and supervise them," says Marieta. "We ask them to fill the Zoho Calendar with their day's agenda. So now instead of them sending a report, I can refer to the calendar and know what they've done and what they're planning to do today."

## **Implementation with Cloudnova**

[Cloudnova](#) is a Zoho Advanced partner based in Italy which specializes in CRM, inbound marketing, and marketing automation. They offer the best strategies and the most advanced technologies in the business to enhance marketing, sales, collaboration, and communication. They've been with Zoho since 2011 and are fully conversant with Zoho's suite of business

solutions. Cloudnova helps businesses attract visitors, generate leads, and acquire customers by deploying its team of experts in inbound marketing, lead generation, marketing automation, and CRM. Read more about Cloudnova [here](#).

Since YEM's adoption of Zoho CRM in 2016, the tool has been an integral part of the company's operations. Cloudnova team and the CEO collaborated to customize the CRM based on YEM's requirements. They assisted the team in importing all the existing data to create a unified database, integrated with the CRM software and the company's ERP system (Business Net). The implementation process lasted for a month and the team was trained to get accustomed to the tool. Since then, the company's business processes have improved and the team has easily adapted to them.

"Zoho CRM is fairly easy and user-friendly," Marieta says. "It only takes a few hours of training and configuring and then it's all set."

## **Solution**

### **Tracking sales activity**

YEM has integrated Zoho Calendar into their CRM environment, which helps management track the sales team's daily activities, such as calls, training sessions, and demos with customers and prospects. This obviates any need for geographically distant individuals on the team to send daily activity reports.

"Imagine you don't have to write an activity report every single day," Marieta says. "That's an hour each day you can instead spend in a customer meeting, closing a hundred million dollar sale. And if you save that hour each day? That's almost an entire extra day in the week."

### **Measuring sales performance**

The integration of Zoho CRM and Zoho Analytics enables management to analyse CRM data much more efficiently. With its intuitive drag-and-drop interface, they can create reports and dashboards with real time data pulled from the CRM. This means the team can track developments, analyse business conditions, and identify which branches are doing well and which ones can do better. This quick company-wide overview of the week's performance helps management plan and enhance their operations in the region. Additionally, they can check the performance of each sales representative and distinguish top performers from those who need more training.

"I like the analytics and CRM integration because it's quick and takes just three minutes to get

a complete overview of what happened last week," says Marieta.

## **Pipeline management**

The key to designing a successful sales process is to have an organized sales pipeline. With the end-to-end pipeline management features in Zoho CRM, YEM has complete control over its sales pipeline and closes more deals in less time. The sales team is now able to track the sales pipeline, identify hot prospects who are likely to purchase, and spend more time communicating with them to achieve their sales targets on time. Having a complete overview of the pipeline for the current and following month has empowered the team to design an efficient follow-up process and be informed about the arrival of the new revenues, thereby facilitating the decision-making for various operations.

## **Dashboards**

As the business has expanded into different countries, the sales team at YEM is increasingly scattered, creating the need for a centralized view of all sales activity. Customized dashboards provide management with a complete view of performance across different sales teams and a way to regularly check on business conditions and KPIs. This enables them to make data-backed decisions and boost sales success with actionable intelligence.

"The dashboards give me all the details I need," Marieta says. "I know whom the sales team met with, how many potentials they've generated, what their pipelines look like. I know what exactly they did."

YEM has a longer sales cycle, which requires the sales team to be updated and equipped with a system that guides them in the follow-up process. The deals they want to win might take as long as a year, hence, they need a personal dashboard for every salesperson. This helps them stay on the top of all the deals in the pipeline, as well as the day's agenda.

## **Email automation**

YEM uses email automation to send electronic direct mail to their customers and keep them updated about new updates and connected with the sales team.

"We use Zoho CRM to market our products and send information to our customers without losing time in writing lengthy emails," says the a salesperson at YEM.

## **Audit logs**

Audit logs are a chronological sequence of entries, each resulting from the actions performed by users in the CRM. This is a favourite and frequently used feature at YEM. Management can use it to keep a track of all activities performed by the sales team and provide feedback to enhance productivity. They can monitor who has used the CRM, when they used it, and what they did.

## Zoho CRM mobile app

At YEM, the sales team has to operate both on- and off-site. Thankfully, on-site conversations can be documented using the CRM mobile app. Also, since YEM shoots for a target KPI of two to three on-site meetings per day for every salesperson, the app is handy for checking the day's agenda on the go and noting down meeting details they'll need to refer for follow-ups.

## What lies ahead for YEM

YEM has been growing steadily since 2012 and is now looking to expand further into Australia, New Zealand, and the Middle East. The company looks forward to entering these new markets, where it can help more customers simplify the process of launching and expanding the business into these markets. YEM aims to offer a full team of locally based export managers who operate in the same language, culture, and time zone as their potential clients.

YEM's management has found that employees take great pride doing their work more efficiently using the latest world-class technology in Zoho CRM. This has resulted in a 20% increase in their YOY revenue. YEM sees Zoho CRM as one of the greatest contributors to their growth and looks forward to strengthening that partnership.

"We have the right instrument to keep track of our business and our people," says Marieta.  
"We have a constant view of our business situation, which is essential for managing growth."

"We started with Zoho and we've never looked back. As Zoho expanded its platform, we've moved in parallel with it. We're delighted to be associated with Zoho. Anytime there's a problem, we can reach out to the support team to get it sorted out within a few hours, which is great."

Marieta,  
Finance and Reporting Manager, YEM



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