



Zoho Corporation

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All you need to know about Bigin

What is Bigin?

Bigin is a pipeline-centric CRM built and priced for small businesses, which is designed to make your customer-centric operations more effective. Small businesses have limited resources, juggling a variety of business activities. Hoping to serve their customers better they resort to different software tools like CRMs, Help Desk, Spreadsheets and Project Management apps.

But, they end up spending a substantial amount of money on several software products loaded with complicated features they do not even need. Even worse — all their data ends up being scattered across multiple platforms that are not unified.

To address the needs of small businesses and centralize customer-facing operations in one software tool, we present - **Bigin**.

It offers out of the box solution for all your business needs and eliminates the use of spreadsheets and other third party applications that function in silos. With Bigin you get all the functions you need to carry out your business without the need to rely on external sources. Bringing your entire business into a single system enhances the relationships with your customers and streamlines your sales process, enabling you to make your sale successfully and quickly.

Why cloud based?

Running software applications on your own machine requires specific hardware and frequent maintenance. A small disruption can have a catastrophic effect on your business. You may also be wasting money on features you aren't using.

Bigin uses the cloud, meaning that the software and data can be accessed from anywhere as long as you have an internet connection, and you only pay for the features you actually need.

In the technology-driven business world, you can't always be in your office to carry out your operations. When you are a sales rep, you spend a lot of your working hours on the road. Having all your data centralized allows you to access data from anywhere without making your customers wait.

How can small businesses benefit from using Bigin?

Small businesses have limited resources and it's important to make the best use of them. Bigin helps you do exactly that. The simple user interface keeps the time required to learn to use the product to a minimum and the powerful tools take care of your most commonly repeated business tasks and perform them exactly the way you want.

Imagine you just started a business and have a handful of customers. Keeping track of them is easy, and you can carry out all your business tasks yourself. Once your business starts attracting new customers, it becomes more difficult to keep up.

Bigin is your secret weapon to organize your business data into Contacts, Companies, Pipelines, and Activities allowing you to see what areas need your attention and when. Bigin helps you to communicate effectively with your team enabling you to work together as one. This helps you focus more on your customers and increase your productivity.

Manage your sales pipeline.

Sales pipeline involves a set of stages which your prospect goes through before becoming your customer. They provide a visual representation of your business opportunities which helps you evaluate and manage your business process effectively. Making a deal with your customers without a solid pipeline is like going to war without a weapon. You are destined to lose.

Need for multiple pipelines

With multiple business operations, homogenous pipelines are not a practical fit for a small business. For example, a small business might have activities like these, often handled by a small team.

- Following up with prospects
- Resolving customer tickets
- Issuing refunds
- Onboarding new customers
- Collecting testimonials from happy customers

In this case, a single pipeline will not be effective and that's where Team Pipelines come handy - you can have dedicated pipelines for different business processes and customize them with pipeline-specific fields, record types, stages, and profile permissions.

Customize Bigin

Choose what you want to see and how you would like to see it. You can customize your Bigin account. You can add custom fields to your modules and view the data that you need to see in different ways.

Capture website visitors as contacts

Your website introduces your customers to your products, but can it do more? Bigin allows you to create web forms and embed them in your website, so interested customers can submit their details and be captured as contacts in your account.

Automate your business processes

In any business, there are certain actions that need to be executed repeatedly, such as following up with a customer, notifying the sales manager when a new contact is added, and assigning follow-up tasks to the salespersons. The tasks may be simple, but performing them over and over will become tiresome and you may slip up and forget to carry them out. That's where automating these tasks can prove effective as you will no longer miss any of these repetitive tasks.

Create activities

Various activities have to be carried out in your business and you will need to keep track of them all. In Bigin, tasks, events, and calls are grouped as activities. You can create a follow-up task and assign it to a sales rep, add details of the call with your customer (such as duration, purpose of the call and the outcome), or, if your customer wants to have an on-site demo, you can schedule an event. All this can be done in the activities module of your Bigin account.

Stay connected across channels

Due to advances in technology, there are various ways your customers can get in touch with you: email, twitter, phone calls, and support tickets. This can require you to switch between different applications to get things done. Bigin brings all these together into a single window, where you can manage everything. Simply open the record's details page and view all the interactions between you and your customers, be notified if someone tags you on twitter, make calls, and respond to support tickets all from one place.

Protect sensitive data

Since all your data is in one place, securing it is necessary. In any business, you may want to restrict access to your organization's data to just some users. You can use *Roles* and *Profiles* in Bigin to do so. Every organization follows a hierarchy system based on roles such as CEO, manager, sales rep, etc. A sales rep will require different access to data than the CEO or a manager. This access can be defined using *Profiles*.