

# Zoho MeetUp!

## Istanbul Kullanıcı Grubu

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Zoho CRM Pathfinder Sunumu

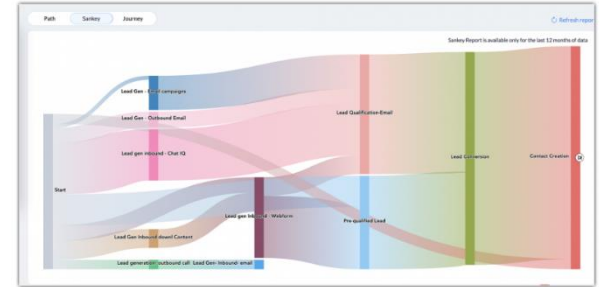


Cloudyflex

# Zoho CRM – Pathfinder

- ◆ Zoho CRM içerisindeki CommandCenter içerisinde erken erişime açıldı.
- ◆ Enterprise ve Ultimate sürümlerde açık. Zoho One içerisinde de var.
- ◆ Eğer bu özellik şuan sisteminizde açık değil ise, [support@zohocrm.com](mailto:support@zohocrm.com) üzerinden erken erişime açılmasını talep edebilirsiniz.

Path	Record Count
1 Entering the site	6
2 Entering the site • Sign-up • Explore products • Start a chatbot conversation • Add • Assess dimensions • Adding to cart • Choosing Method of Payment • Choosing payment	50
3 Entering the site • Sign-up • Explore products • Adding to cart • Explore products • Start a chatbot conversation • Checking eligibility	12
4 Entering the site • Sign-up • Subscribe to the newsletter • Explore products • Email with an enquiry • Exploring the blog	25
5 Entering the site • Exploring the blog • Subscribe to the newsletter • Explore products • Checking eligibility • Start a chatbot conversation • Email with an enquiry • Choose	50
6 Entering the site • Explore products • Moving to cart • removing from cart	28
7 Entering the site • Adding to cart • Pay	1
8 Sign-up	1
9 Add	1



# Zoho CRM – Pathfinder

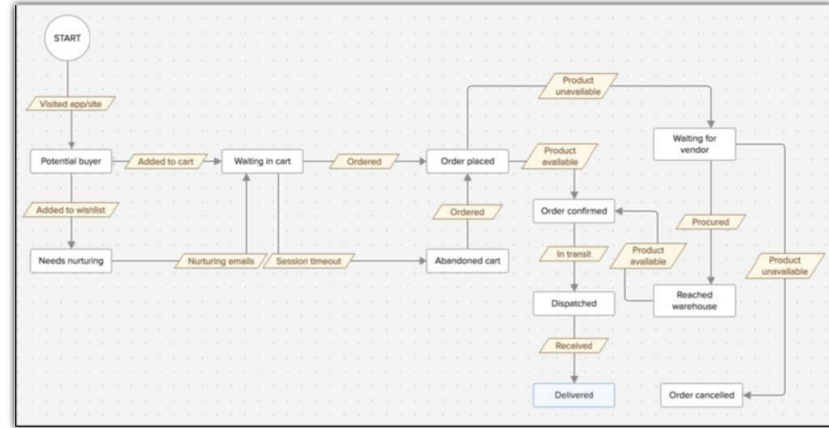
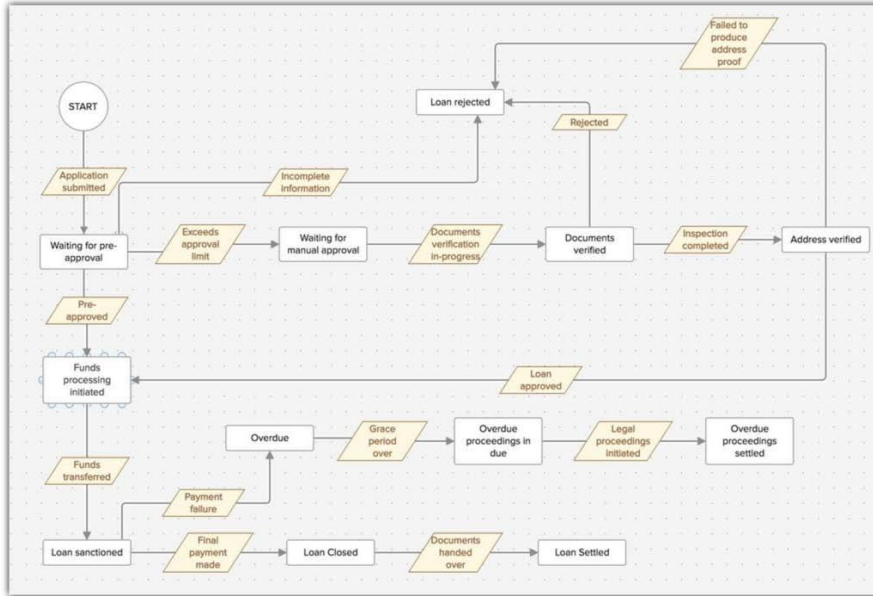
◆ **Kimler için?** CX süreçlerine önem veren, E-Ticaret, tüketiciye yönelik iş yapan (B2C) firmalar için uygun.

◆ **Müşteri deneyimini ve satın alma davranışını** ileri seviyede analiz etmek isteyen firmalar için uygun.

◆ **Süreç verimliliğini** takip etmek isteyen firmalar için de uygun.



# CommandCenter İçerisindeki Journey Builder



# Pathfinder vs Journey Builder

## THEORETICAL DIFFERENCE

### PathFinder

Discovers different paths or journeys taken in your business.

Captures and records real-time interactions with your existing touchpoints as and when they happen.

It is dynamic in nature. It can assume different paths based on the user navigation.

It is a receptive and reactive analysis.

### Journey Builder

Lets you orchestrate contextual journeys/ processes.

Lets you set up contextual touchpoints and establish personalized communication at each juncture of the process.

It lays down a static forward path for your customers to traverse.

It allows proactive means to design customer cadence.

## TECHNICAL DIFFERENCE

### PathFinder

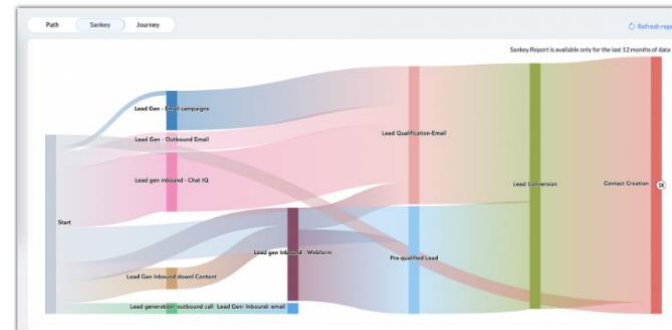
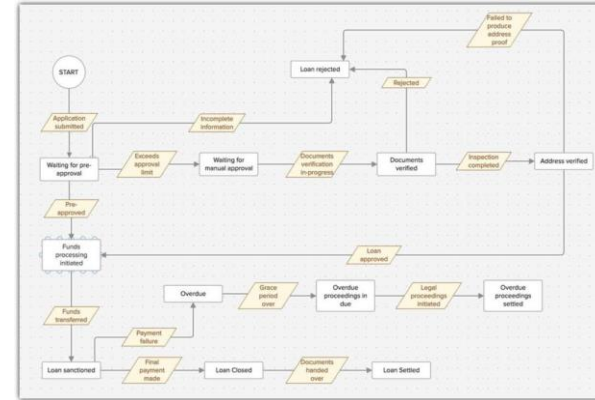
Uses States, Touchpoints, and Identifiers to capture journeys.

Produces three graphical reports: Path report, Sankey report, and Journey report, to analyze customer journeys.

### Journey Builder

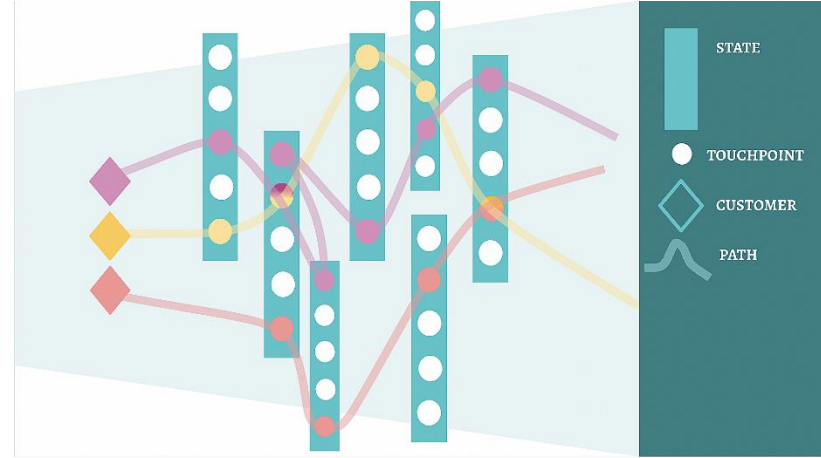
Uses States, Transitions, and Triggers to design journeys.

Lets you configure record **actions** at each transitioning point.



# Zoho CRM – Pathfinder

- ◆ Gözlemleyici bir özellik. **Deneyimi tasarlamaz**, deneyimi takip etmenizi ve ölçümlemenizi sağlar.
- ◆ Google Analytics’de yer alan çok kanallı huni raporlarını referans alabilirsiniz.
- ◆ State, Touchpoint, Path olarak adlandırılan 3 temel yapı ile oluşturuluyor.



# Touchpoint Yapısı

- ◆ Touchpoint olarak adlandırılan yapı içerisine çeşitli **tetikleyiciler** ekleyerek, CRM üzerinde takip etmek istediğimiz deneyimleri tanımlayabiliyoruz.
- ◆ **3 farklı tetikleyici tipi var**
  - ◆ Entegrasyon bazlı
  - ◆ Özel (Custom)
  - ◆ Standart

## Entegrasyon bazlı

Add Touchpoint

Q Search

Receiving a new response for a ticket in Desk

Desk ticket goes overdue

Receiving rating for a ticket in Desk

Escalating a ticket in Desk

Opening an Email Campaign

Clicking an Email Campaign

## Standart

Add Touchpoint

Q Search

Convert

Create of a record

Edit of a Record

Submission of a webform

Value of a date / date time field

Sending an outgoing email

## Özel (Custom)

Add Touchpoint

Q Search

Receiving an API call

Receiving a custom signal

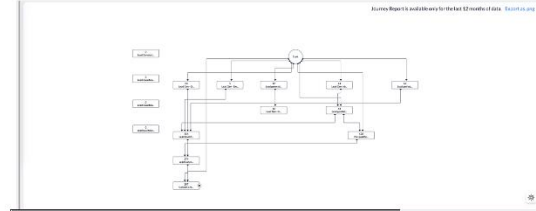
\*SDK seçeneği de var

# Rapor Tipleri

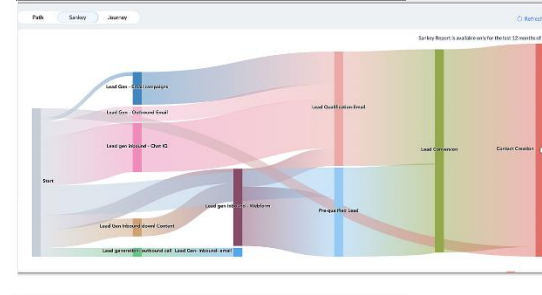
- ◆ **Path Raporları** : Bir yolculuğu ardışık bir şekilde takip etmenizi sağlar.
- ◆ **Journey Raporları** : Yolculuğu diagram modelinde takip etmenizi sağlar.
- ◆ **Sankey Raporları** : Bir yolculuğu genel hatlarıyla resmederek gösterir. Yolculuklar arasında geçişleri gösteren bir huni raporudur.



Path report



Journey report

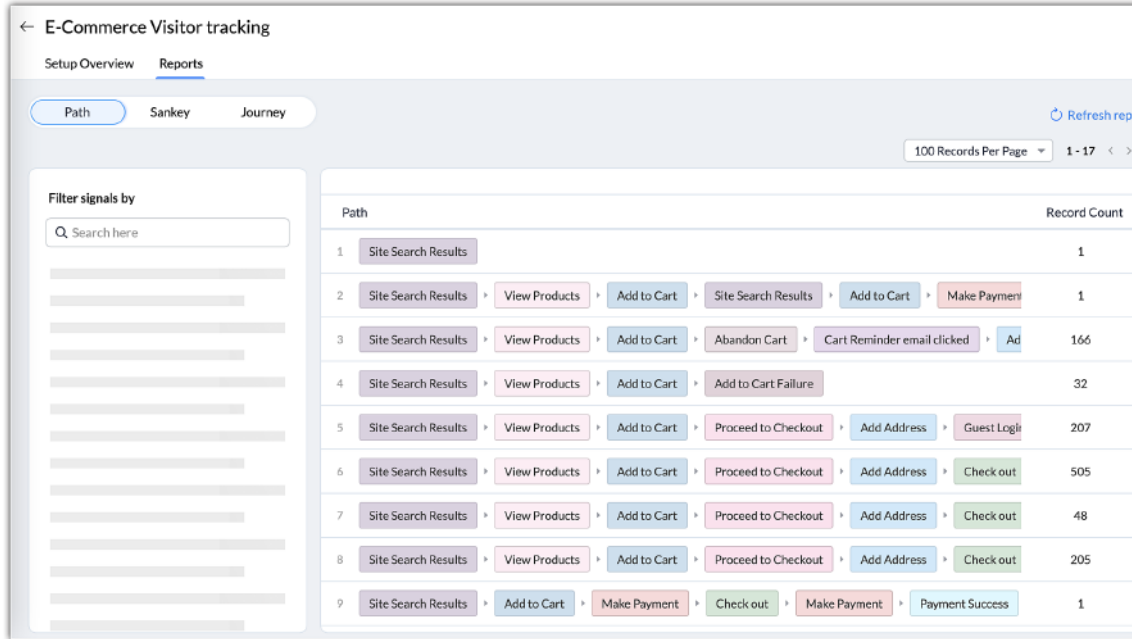


Sankey report



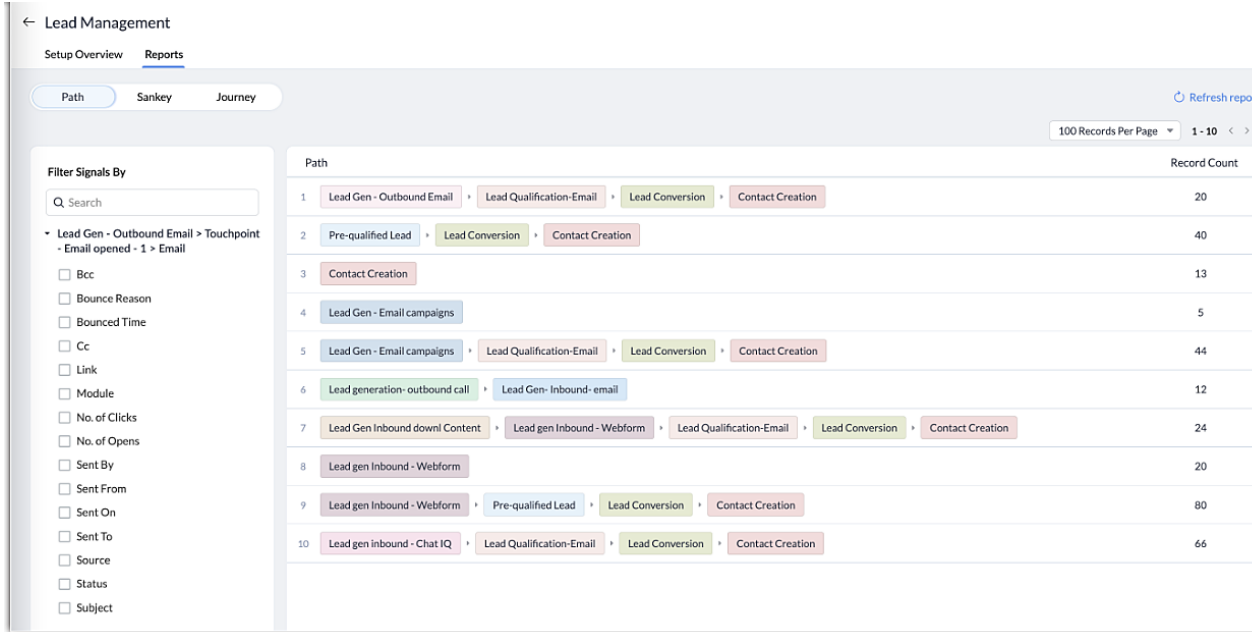
# Rapor Tipleri

## ◆ Path raporu örnek #1



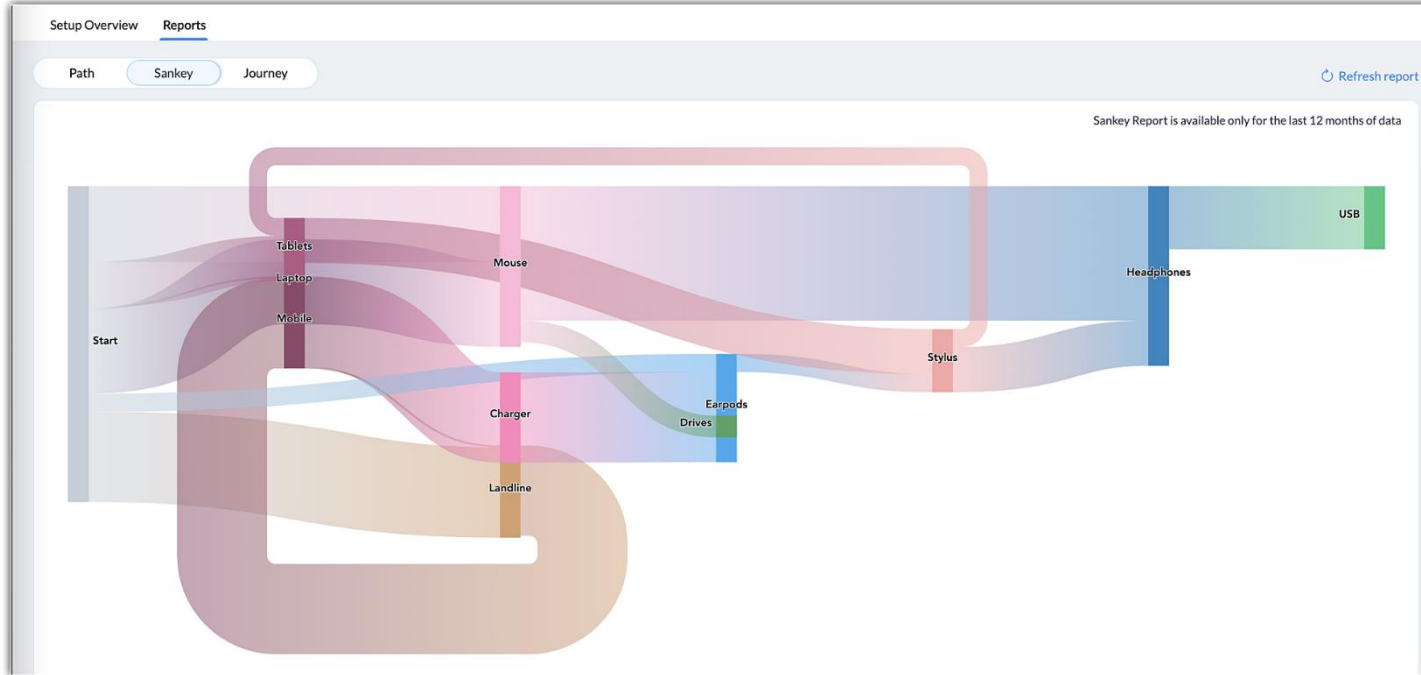
# Rapor Tipleri

## ◆ Path raporu örnek #2



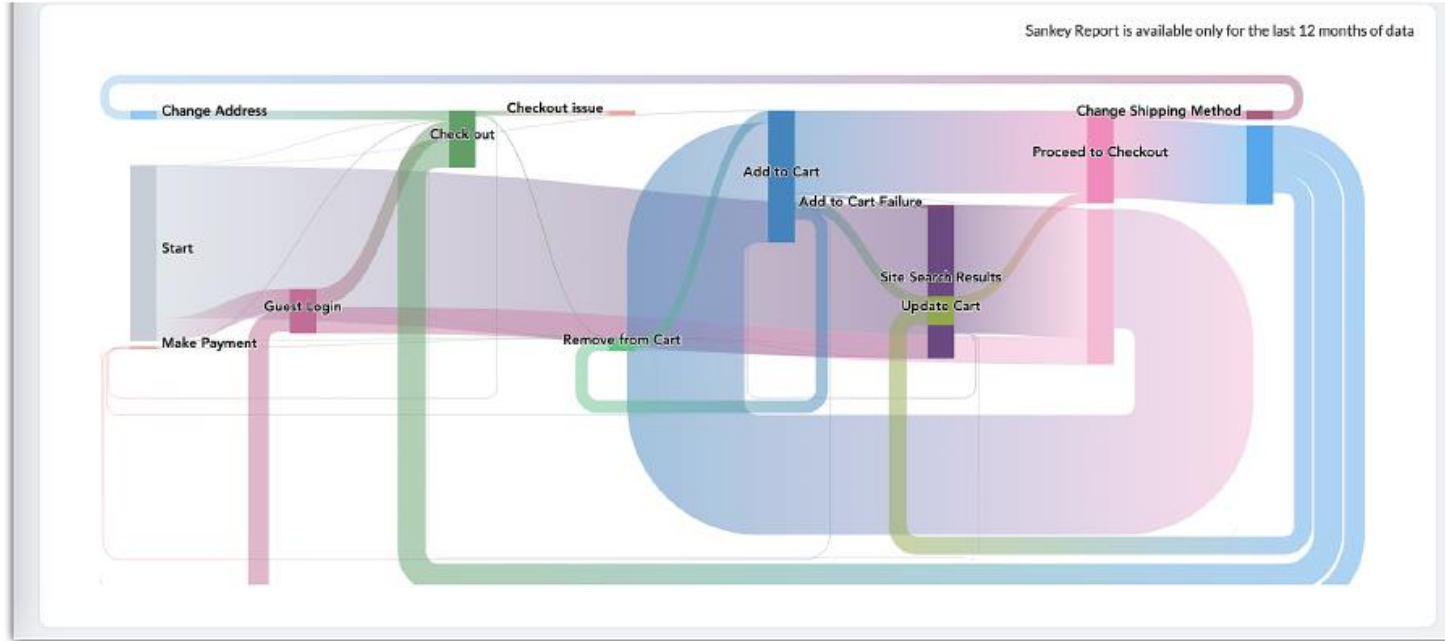
# Rapor Tipleri

## ◆ Sankey raporu örneği örnek #1



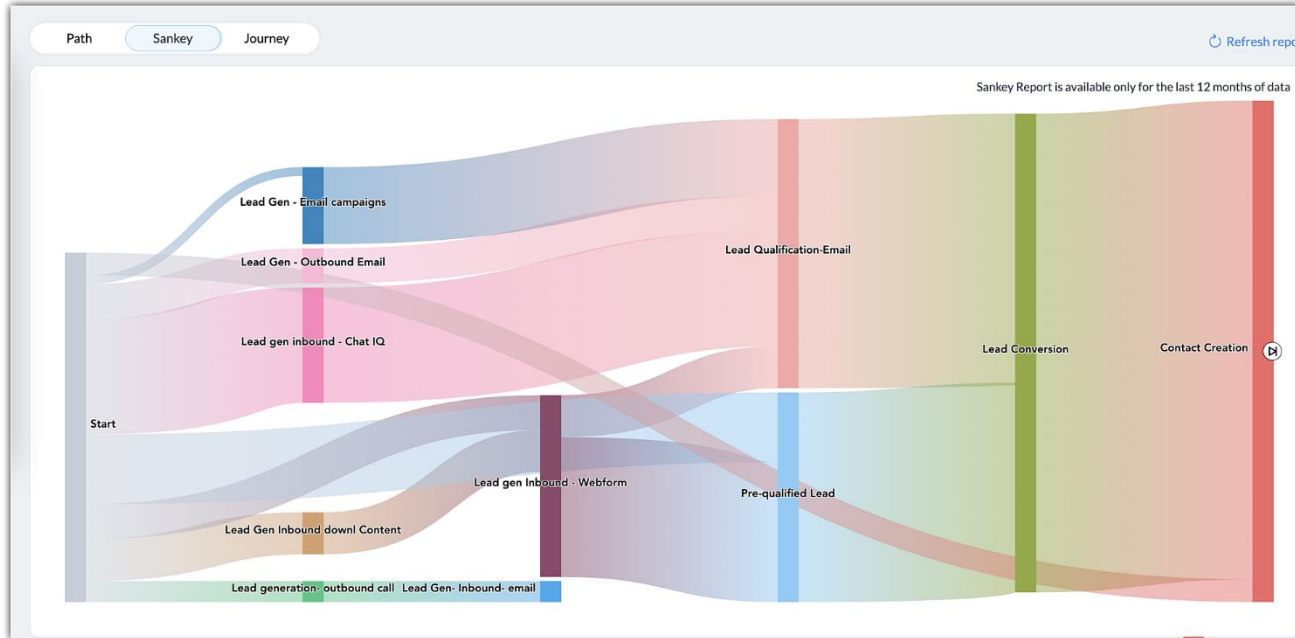
# Rapor Tipleri

## ◆ Sankey raporu örnek #2



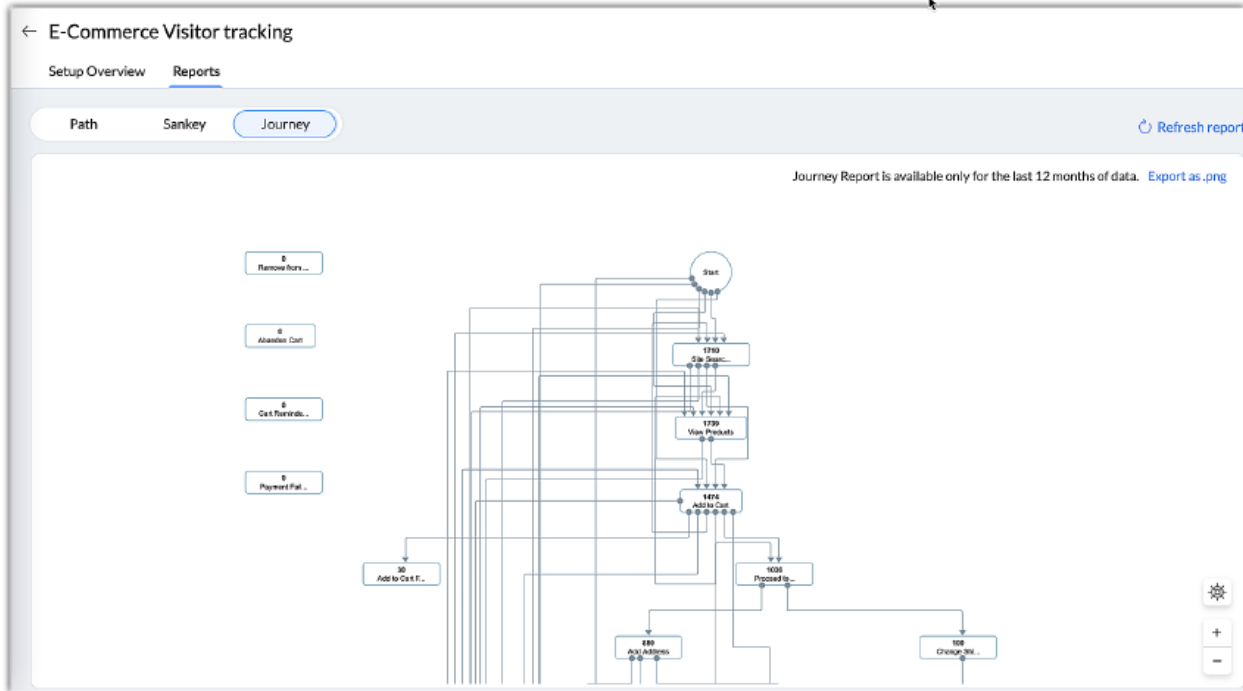
# Rapor Tipleri

## ◆ Sankey raporu örnek #3



# Rapor Tipleri

## ◆ Journey raporu örneği



# Pathfinder Kapsam Örneği

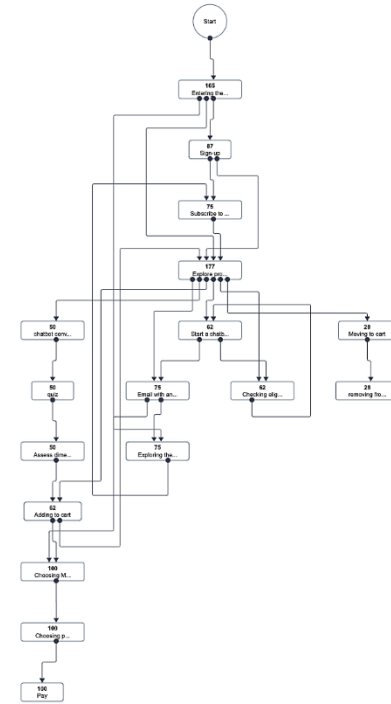
Assess user behavior in a retail store

Scope: Understand and decipher customer behavior.

Zylker.com is a novel online electronic store, trying to understand the behavior of visitors on their site. They'd like to understand how visitors move through their site, in order to decide upon UX strategies, targeted sales, how to allocate marketing spends, and more.

As a platform, they have multiple touchpoints that users access in no particular order, including:

- Sign up to the site
- Subscribe to the newsletter
- Explore products
- Email with an enquiry
- Start a chatbot conversation
- Check eligibility
- Use tools on the site to check the product dimensions virtually
- Add products to wish lists
- Remove products from wish lists
- Add products to cart
- Explore the blog
- Take up a quiz
- Choose between different payment aggregators
- Choose a desired method of payment







# Önemli Dökümanlar

- ◆ Pathfinder özelliğine dair detaylı online dokümantasyona erişmek için [tıklayın.](#)
- ◆ Doküman içeriği;
  - ◆ Pathfinder üzerinde S.S.S
  - ◆ Zoho CRM Pathfinder özelliğinin kapsamı
  - ◆ Pathfinder içerisindeki raporlara dair detaylar
  - ◆ Pathfinder üzerindeki kavramlar ve bileşenler
  - ◆ Pathfinder özelliğine bütünsel bir bakış

# Bizi Dinlediđiniz İin Teřekkürler

