



Odoo CRM :
**How Odoo can help you
become more efficient without
missing any opportunities**

A preparatory guide to digital transformation



nali**s**

The logo for Nali, featuring the word "nali" in a white, lowercase, sans-serif font, followed by a graphic element consisting of several teal diagonal lines of varying lengths, and then the letter "s" in the same white font.

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General introduction

General introduction

In a world where digitalisation is essential to business growth, having a high-performance, flexible management tool is a real asset. Odoo, one of the most popular and innovative ERPs on the Belgian market, stands out for its modularity, ease of use and ability to adapt to the needs of SMEs and large companies alike.

With more than 12 million users worldwide and a presence in over 175 countries, Odoo offers a suite of applications covering all business needs: CRM, accounting, stock management, e-commerce, marketing, etc. Its ecosystem is supported by a large community of partners, who help companies implement and optimise Odoo.

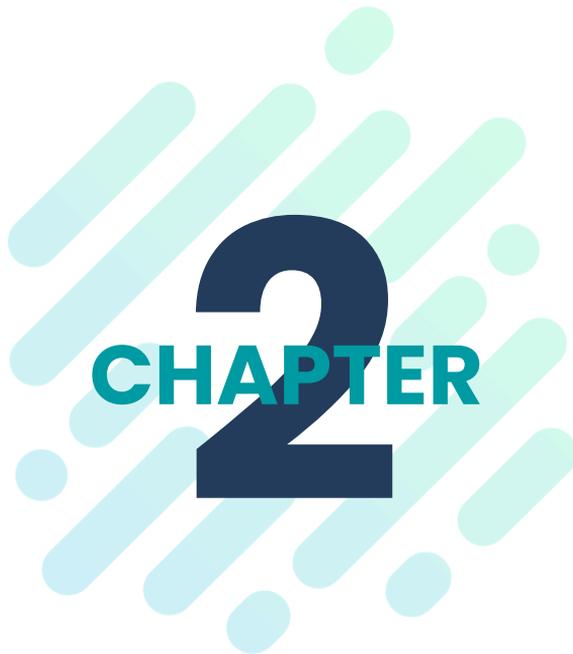
Among these experts, Nalios stands out as a Gold Partner, a status that testifies to its high level of expertise and customer satisfaction. In figures, Nalios is :

- More than 250 Odoo projects implemented, with customers from a wide range of sectors.
- More than 3,000 satisfied users, benefiting from a solution tailored to their needs.
- 46 employees, including certified consultants with expertise in Odoo implementation and optimisation.
- 7 branches in Belgium (Wallonia and Flanders), France (Lille), Switzerland (Lausanne and Geneva) and the French West Indies and Guyana, providing a local presence for local support.

Founded in 2020, Nalios is experiencing annual growth of 60%, reflecting its dynamism and commitment to its customers.

Thanks to its expertise, Nalios guarantees smooth implementation and strategic support to maximise its customers' productivity and profitability.

In this article, we explore the key features of Odoo CRM, the tangible benefits it offers businesses and the strategic role of Nalios in optimising and ensuring the success of your digital transformation.



CHAPTER 2

The CRM application

The CRM application

A. What is it?

In a world where customer relationship management is becoming more and more essential, having a high-performance CRM has become essential for companies wishing to maximise their sales efficiency. However, many companies are struggling to centralise their information, automate their customer follow-up and fully exploit their sales potential.

This is where Odoo CRM comes in. This all-in-one software simplifies lead management, automates repetitive tasks and provides a real-time overview of every sales opportunity. With integrated tools for tracking communications, managing offers and planning marketing actions, Odoo CRM transforms the way you interact with your customers and prospects.

At Nalios, we help you integrate Odoo CRM into your processes, so you can focus on what really matters: developing your relationships and boosting your business. This white paper guides you through the essential features of Odoo CRM and shows how it can optimise your customer relationship management to power your business.

The programme

- Why choose Odoo for your CRM? Comparison with other ERPs.
- Odoo CRM: key features to help you convert your opportunities and increase your sales.
- Best practices for a successful implementation

B. Why use Odoo as a CRM? Comparison with other ERPs

A. Odoo CRM

Criteria	Description
Philosophy	Modular open-source ERP with native integration
Pricing model	Flexible: Pay per user/module (Enterprise) or completely free in Community
Free version	Odoo Community: free version with access to the code and possible modifications
Easy to handle	Intermediate, but allows rapid skills upgrading and extensive customisation
Customisation	Very high: open to specific developments and adjustments as required
Contact management	Yes, optimum centralisation of contacts with multi-application synchronisation
Sales pipeline	Yes, can be customised to suit business needs

Criteria	Description
Reports and dashboards	Yes, with advanced personalisation and access to full analytical data
Management of quotes and invoices	Yes, native and fully integrated with sales
Integration with other tools	Yes, with powerful API and ready-to-use connectors
Déploiement	Cloud and On-Premise according to company preferences
Target audience	SMEs and large companies looking for flexibility and scalability
Support and community	Active community + Official support with extensive documentation

B. Salesforce

Criteria	Description
Philosophy	Powerful but complex and inflexible cloud CRM
Pricing model	Expensive model with subscription per user and additional paid features
Free version	No free version, just a temporary trial
Easy to handle	Complex: requires extensive training and onboarding
Customisation	High, but dependent on Salesforce developers
Contact management	Yes, but segmented management between pay modules
Sales pipeline	Yes, but you have to pay for the advanced options
Reports and dashboards	Yes, powerful with AI, but difficult to customise without expertise

Criteria	Description
Management of quotes and invoices	Yes, but requires an additional pay module
Integration with other tools	Yes, but often at extra cost via the AppExchange
Deployment	100% Cloud, no On-Premise option
Target audience	Large companies with high budgets and complex needs
Support and community	High-quality but often expensive support, active but less accessible community

C. HubSpot CRM

Criteria	Description
Philosophy	Simple CRM, focused on marketing but limited in advanced sales management
Pricing model	Freemium, but quickly becomes expensive for advanced features <i>nalités avancées</i>
Free version	Yes, but the free version has very limited automation and reporting capabilities
Easy to handle	Very easy to learn, but lacks depth for complex processes
Customisation	Limited customisation (workflows, few advanced options)
Contact management	Yes, but less robust contact management than Odoo
Sales pipeline	Yes, very visual but less customisable
Reports and dashboards	Yes, but not very flexible for companies with specific needs

Criteria	Description
Management of quotes and invoices	No, requires an external solution or integration
Integration with other tools	Yes, but fewer native integrations than Odoo
Deployment	100% Cloud, no On-Premise option
Target audience	SMEs and start-ups looking for a quick and easy solution
Support and community	Good support, but smaller community

D. Zoho CRM

Criteria	Description
Philosophy	Modular cloud CRM, affordable but sometimes too compartmentalised
Pricing model	Pay per module, quickly becomes expensive for all the tools
Free version	Yes, but the free version is very limited in terms of testing
Easy to handle	Easy to learn, but lacks configuration flexibility
Customisation	High, but based on low-code tools that are not suitable for complex needs
Contact management	Yes, but less robust contact management
Sales pipeline	Yes, but less flexible than Odoo and Salesforce
Reports and dashboards	Yes, but lacks depth in advanced analytics

Critères	Description
Management of quotes and invoices	Yes, but only with Zoho Books
Integration with other tools	Yes, but a less powerful API than Odoo's
Deployment	100% Cloud, no On-Premise option
Target audience	SMEs and growth companies, but limited for large groups
Support and community	Fair support, but smaller community than Odoo

To conclude:

- Odoo CRM is the best choice if you already use other Odoo modules or want an all-in-one solution that offers good value for money.
- Salesforce is ultra-powerful, but expensive and complex.
- HubSpot CRM is great for marketing and small businesses.
- Zoho CRM is a cost-effective and flexible alternative.

3. Odoo CRM – key features to help you convert opportunities and increase sales

A. Key points

- ▶ 100% integrated into your ecosystem – It communicates directly with invoicing, marketing automation, accounting and even project management, with no need for complex integrations.
- ▶ Simplicity and user-friendliness – Intuitive interface, easy customisation and quick start-up, with no need for extensive training.
- ▶ Intelligent automation – Automatic follow-up, opportunity tracking and lead scoring to optimise every interaction.
- ▶ 360° view of the customer – All interactions (emails, quotes, tasks, invoices) in one place for ultra-efficient follow-up.
- ▶ Unbeatable value for money – Features comparable to (or even better than) the market giants, without the exorbitant cost of licences.
- ▶ Powerful, scalable CRM – Odoo CRM centralises customer data and automates sales tasks to improve efficiency and reduce errors.
With its advanced reporting tools, it provides a real-time view of performance.
Its intuitive interface and mobile accessibility ensure optimum responsiveness for your teams.
- ▶ Odoo Community – Odoo benefits from a large community and technical support, so you can be sure of quality support throughout your use of the software.

Plus de 20 000 personnes contribuent au succès d'Odoo dans le monde entier.

Apprenez, partagez et contribuez en rejoignant la communauté Odoo.

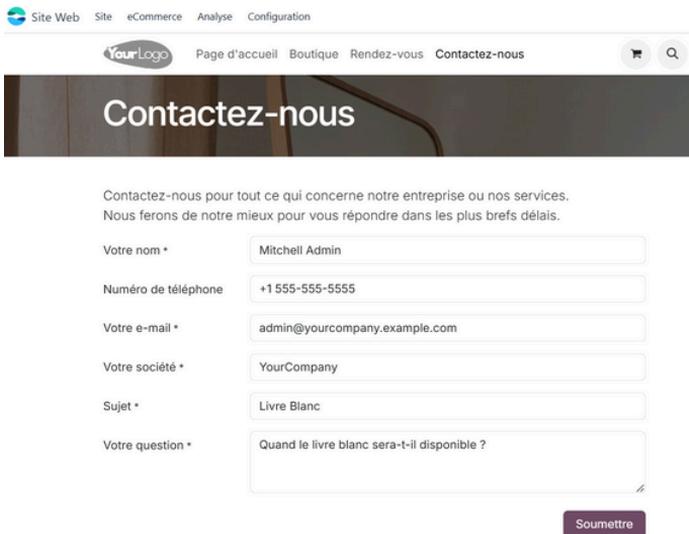
B. To go further – let's jump into Odoo.

Focus on the features that will save you time in managing your customer relations, and therefore boost your sales.

I. Attract and convert more customers

Automatic lead generation

- Capture leads from the website, email (and email marketing), social networks or personalised forms.



The screenshot shows a contact form on a website. The navigation bar includes 'Site Web', 'Site', 'eCommerce', 'Analyse', and 'Configuration'. The main header has 'YourLogo' and 'Page d'accueil', 'Boutique', 'Rendez-vous', and 'Contactez-nous'. The form title is 'Contactez-nous'. Below the title, there is a message: 'Contactez-nous pour tout ce qui concerne notre entreprise ou nos services. Nous ferons de notre mieux pour vous répondre dans les plus brefs délais.' The form fields are: 'Votre nom *' (Mitchell Admin), 'Numéro de téléphone' (+1 555-555-5555), 'Votre e-mail *' (admin@yourcompany.example.com), 'Votre société *' (YourCompany), 'Sujet *' (Livre Blanc), and 'Votre question *' (Quand le livre blanc sera-t-il disponible ?). A 'Soumettre' button is at the bottom right.

*Here, a contact form on the website that will generate a lead in the CRM.



The screenshot shows the Odoo CRM interface. The top navigation bar includes 'CRM', 'Ventes', 'Pistes', 'Analyse', and 'Configuration'. The main header has 'Nouveau', 'Générer des pistes', and 'Pistes'. A search bar is present with the text 'Rechercher...'. The table below shows a list of leads with columns: 'Créé le', 'Piste', 'E-mail', 'Ville', 'Pays', and 'Vendeur'. The first lead is highlighted with a red box.

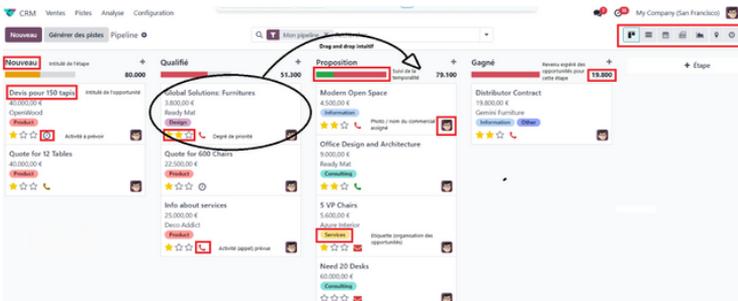
Créé le	Piste	E-mail	Ville	Pays	Vendeur
10/02/2025 15:14:24	Livre Blanc	admin@yourcompany.example.com	Scranton	États-Unis	
05/02/2025 14:26:41	Design Software Info	jj@solair.example.com	Madrid	Espagne	Marc Demo

- Lead prospecting' function that allows CRM users to generate new leads directly in their Odoo database (by using a few credits).



➤ Opportunity tracking and visual pipeline

- Interactive kanban to see the status of opportunities at a glance and prioritise actions.
- Drag & drop to easily move opportunities from one stage to another.



*Presentation of the pipeline

Lead scoring

- Identification of the most promising leads based on defined criteria (source, commitment, history).

The screenshot shows a CRM interface with a pipeline view for '5 VP Chairs'. The 'Nouveau devis' stage is selected, showing a 'Revenu attendu' of 5.600,00 € and a 'Probabilité' of 97,62 %. The contact information for 'Azure Interior - US12345677' is displayed, including email and phone. The salesperson is 'Mitchell Admin'. The interface includes navigation tabs for 'Nouveau', 'Qualifié', and 'Pré-qualifié', and a 'Services X' button.

*Detailed opportunity; focus on probability scoring

- Automatic prioritisation of high value-added prospects.
- Automatic follow-ups, appointment management and activity planning
- Schedule reminders and automatically send personalised emails.
- Easy tracking of appointments and other team activities using the dedicated view.

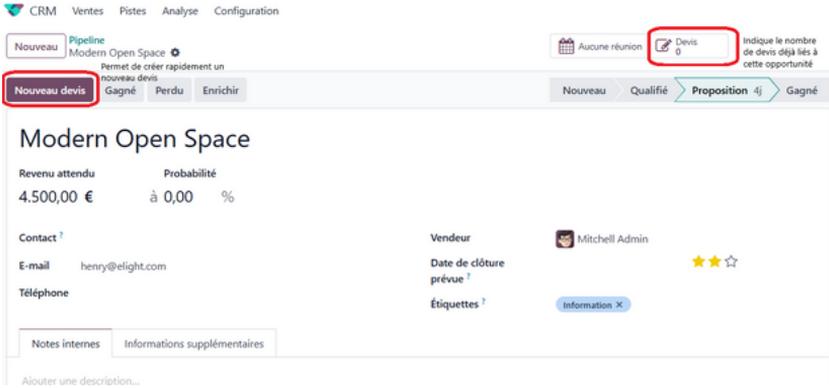
The screenshot shows a CRM 'Activity type view' as a calendar. The columns represent different activity types: 'E-mail', 'Appel', 'Réunion', 'Dernier de suivi', 'Faire un devis', 'Appel pour administration', 'E-mail: Demande de devis', 'No-Op', and 'Changement de devis'. The rows list various opportunities with their dates and activity status (e.g., 'Appel', 'Réunion', 'E-mail').

* Activity type view: information on upcoming activities, related opportunities and contact persons.

II. Maximise sales management and customer follow-up

▶ Automating the sales cycle

- Create and send quotes from opportunities in just a few clicks.

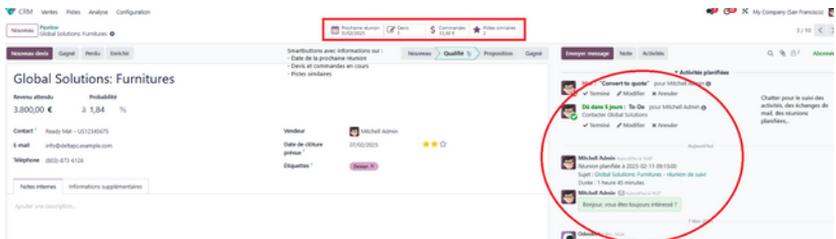


* Detailed opportunity; focus on creating a new quote.

- Automatic conversion of quotes into invoices once validated.
- Manage payments and track receipts directly in the CRM. Thanks to smart buttons and global interconnectivity.

▶ Complete customer history

- Detailed tracking of interactions (emails, calls, appointments, invoices, support tickets).
- Global view of customers to better anticipate their needs.



Team collaboration tools

- Sharing of information between sales reps for effective follow-up.
- Automatic allocation of leads to sales reps based on defined criteria (region, business sector, etc.) and team management to optimise responsiveness.

The screenshot shows a CRM interface for a sales opportunity named 'Modern Open Space'. At the top, there are navigation tabs: 'Nouveau', 'Pipeline', 'Modern Open Space', and 'Permis de créer rapidement un nouveau devis'. A red box highlights the 'Nouveau devis' button. To the right, a 'Devis' counter shows '0' with a red box around it and a tooltip that says 'Indique le nombre de devis déjà liés à cette opportunité'. Below the tabs, there are status buttons: 'Nouveau', 'Qualifié', 'Proposition 4j', and 'Gagné'. The main content area displays the opportunity details: 'Revenu attendu' of 4,500.00 € and 'Probabilité' of 0,00 %. It also shows contact information for 'henry@elight.com' and the salesperson 'Mitchell Admin'. There are sections for 'Notes internes' and 'Informations supplémentaires'.

*Focus on a sales team; its members and assignment rules

The screenshot shows the 'Vendeur' (Salesperson) configuration page for 'Vendeur France 1'. It displays the salesperson's details: 'Équipe commerciale France', 'Société My Company (San Francisco)', 'E-mail vf1@nalios.be', 'Mobile', and 'Téléphone +1 555-555-5555'. There is a profile picture of a man with glasses. Below the details, there are configuration options: 'Ignorer l'assignation automatique' (unchecked), 'Pistes (30 jours)' set to '0 / 30 (max)', and 'Domaine' set to 'Pays = France'. A red box highlights the 'Pistes' field and the 'Domaine' rule. At the bottom, it shows 'Nouvelle règle' and '4 enregistrement(s)'. There are also icons for 'Inclure les archivés', '+', and a trash icon.

*Focus on a salesperson; assignment rules and maximum number of tracks.

III. Saving time through automation and artificial intelligence

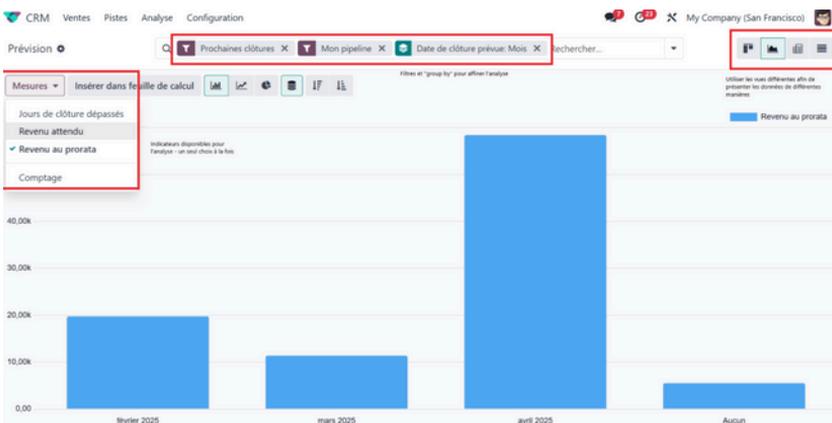
Automated emails and actions

- Automatic reminders and personalised follow-up emails.
- Scheduled reminders so you never forget an opportunity.



Dashboards and real-time reporting

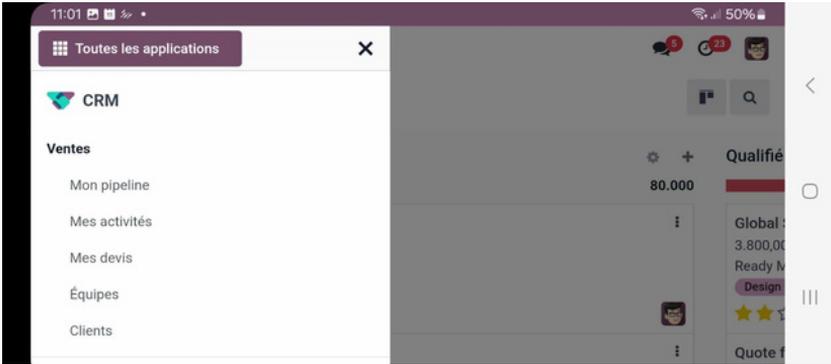
- Sales performance analysis in just a few clicks.
- Track key KPIs (conversion rate, sales generated, etc.).



*Analysis tool; here focus on my pipeline revenue (per month)

► Mobile application

- Access to CRM from anywhere at any time.
- Ability to manage opportunities and customers on the move.



*A CRM perfectly suited to mobile use

IV. In short, immediate ROI: fewer repetitive tasks, more sales!

- Reduce manual tasks → More time for selling
- Optimised customer follow-up → Increased customer loyalty!
- Process automation → Fewer errors and greater efficiency!
- Integrated management with invoicing and accounting → Save time and improve profitability!

4. How do you implement it?

The implementation of Odoo CRM relies on effective structuring and configuration tailored to the company's needs. It is essential to begin by defining the objectives inherent to this implementation.

Next, the commercial teams should be structured, and the pipeline organized according to the key stages of the sales cycle (lead → opportunity → quote → customer). Lead management must be optimized through qualification before conversion, while automating prospect capture via emails, web forms, or external integrations enhances efficiency.

Once these foundations are established, attention must be given to configuring and structuring opportunities while automating recurring tasks (email sending, notifications, lead tracking). This will maximize the sales process. Integrating web forms and other lead sources is also recommended to centralize prospects directly within Odoo.

Odoo CRM's advanced features, such as appointment tracking, lead scoring, gamification tools for sales challenges, and automated reporting, help optimize opportunity management. By leveraging these tools, teams become more efficient and gain access to key performance indicators (KPIs) for monitoring sales performance.

The implementation timeline for Odoo CRM varies based on business complexity. A basic configuration typically takes 2 to 4 weeks, advanced implementation with automation and reporting requires 1 to 3 months, while complex projects with specific integrations can extend beyond 3 months.

To ensure successful adoption, team training and rigorous workflow testing are indispensable. Starting with a Minimum Viable Product (MVP) that includes essential features is recommended, followed by gradual adjustments based on user needs and feedback.

5. Why use Nalios to implement your CRM?

At Nalios, we have dual expertise in implementing Odoo CRM:

We have already deployed it for numerous clients, and additionally, we use it daily to manage our own business. This experience enables us to understand your **challenges** and support you effectively, combining **pragmatism with best practices**.

Our **methodology**, inspired by Odoo standards, adapts to your needs while optimizing **time and budget**. We focus on **in-depth functional mastery** to minimize specific developments, ensuring a **quick, agile, and scalable implementation** without unnecessary costs.

What sets us apart? **Exceptional responsiveness** to ensure your project progresses without obstacles. Our mission: **simplify your digital transformation** with an efficient CRM and **rapid return on investment**.

Furthermore, we assist you in mastering the tool with recommendations tailored to your business and by providing continuous training and advice.



Conclusion

Conclusion

In this white paper, we have explored the key features of the CRM application, highlighted the essential points to consider for a successful implementation, and shared best practices to follow.

With these insights, you now have all the tools to kickstart your Odoo project on solid foundations and optimize your business management.

However, every project is unique, and personalized support can make a significant difference in the quality of your implementation, ensuring a solution truly tailored to your needs.

If you'd like to discuss your project and benefit from advice from our experts, we would be delighted to connect with you.

Schedule a meeting with a Nalios consultant today:

[Book a call](#)

We look forward to working together to build your digital transformation with Odoo!

naliOS

Your Odoo Experts

For more information, visit

naliOS.com

If you have any questions :

info@naliOS.be

Our YouTube channel :



www.naliOS.com