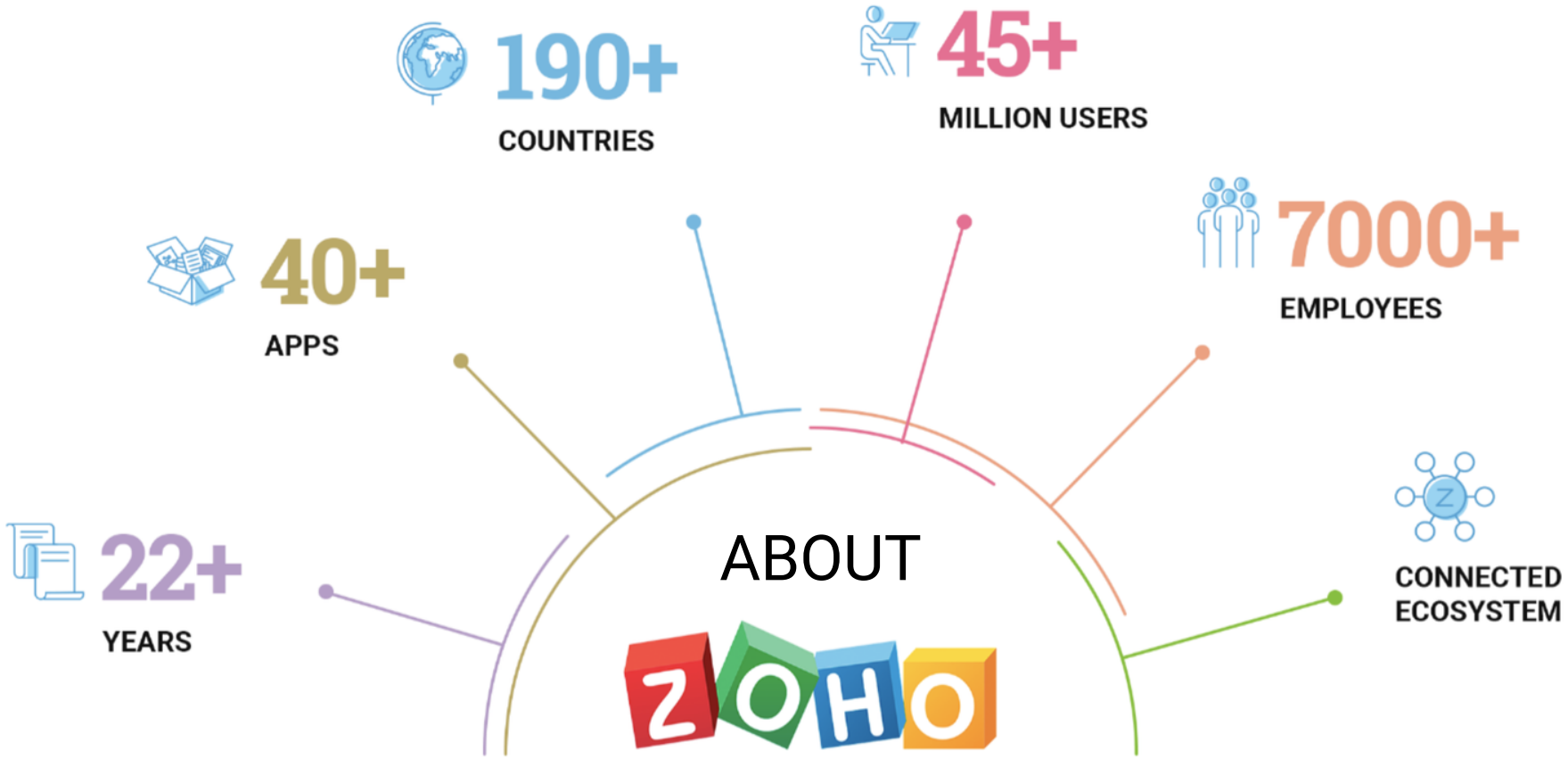
Zoho CRM Overview

Trusted by 45 million users worldwide

Zoho in numbers



Global Footprint

What our customers think about us:

Gartner®

4.3/5

GetApp®

4.19/5

Capterra

4/5

FinancesOnline
REVIEWS FOR BUSINESS

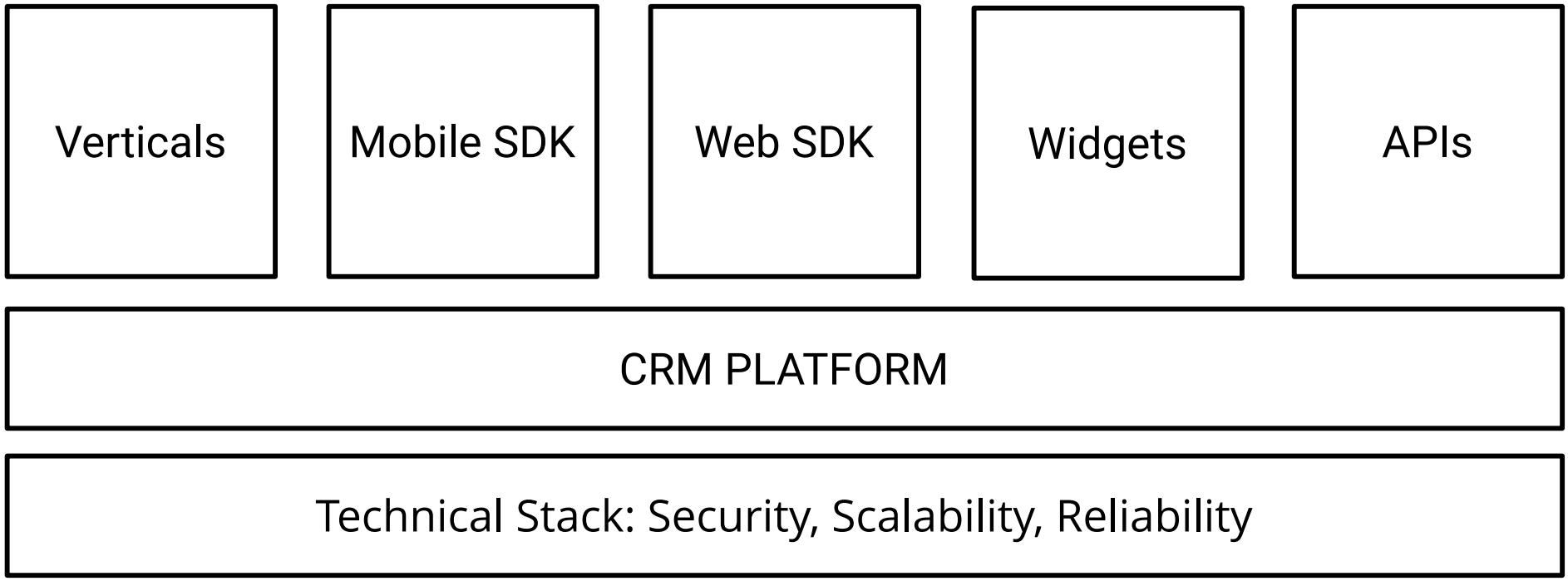
9.4/10

Zoho customers include

ZOHO CRM

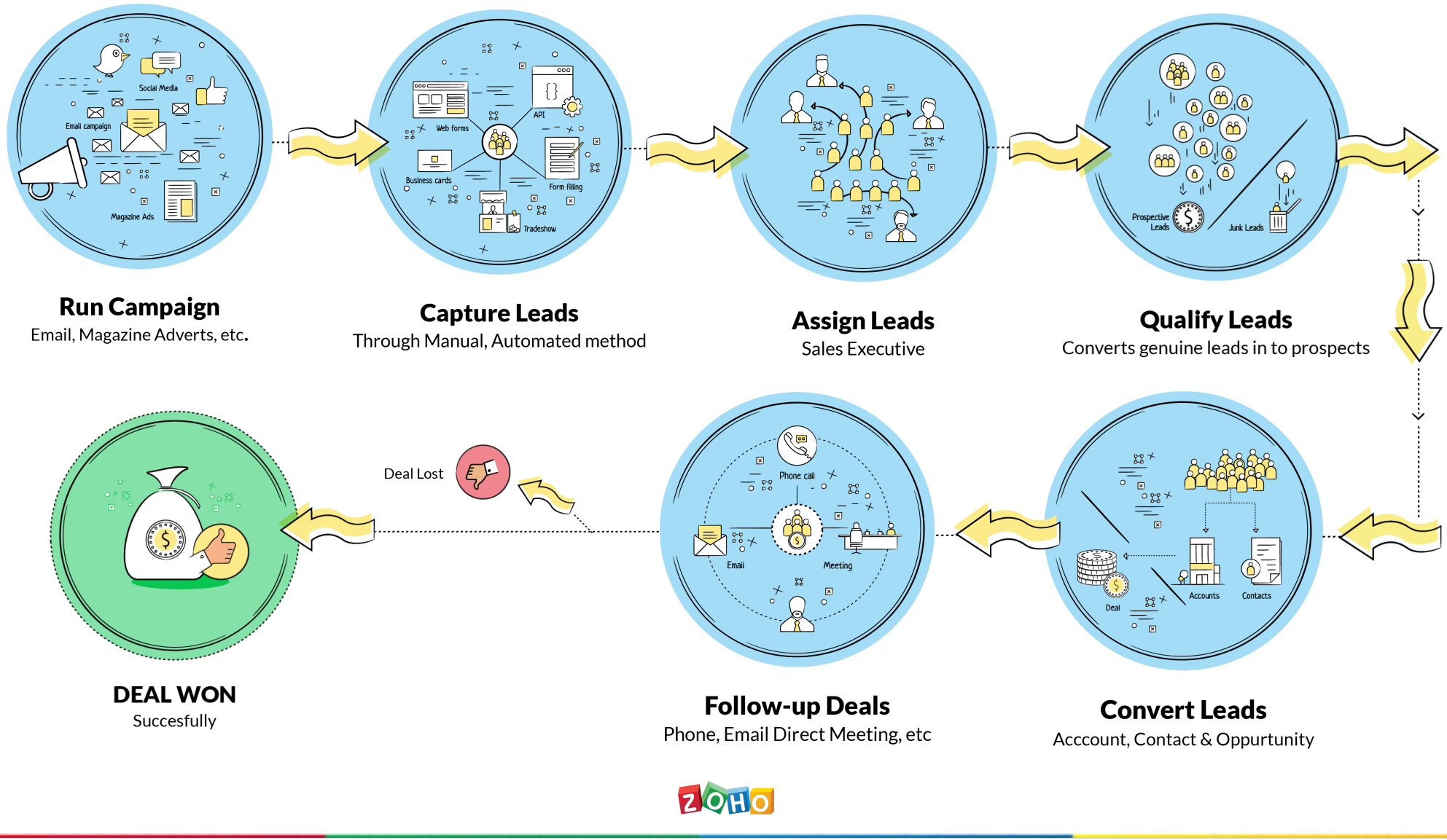
Let's dive in...

Zoho CRM as a platform



Key Differentiators - Functionality

- **Multichannel communication** - Email, Phone, Chat, Social Media
- **Blueprint** - Powerful process automation
- **Multi-user portals** - Bring in customers, vendors and partners together
- **SalesSignals** - Real-time analytics and notifications to reach out to every customer
- **Artificial Intelligence** - Zia, our first AI powered conversational Sales Assistant
- **Zia Voice** - The first conversational AI for sales, and support.
- **Zia** - built-in AI with Anomaly detection, prediction, sentiment analysis.



Run Campaign
Email, Magazine Adverts, etc.

Capture Leads
Through Manual, Automated method

Assign Leads
Sales Executive

Qualify Leads
Converts genuine leads in to prospects

Convert Leads
Acccount, Contact & Oppurtunity

Follow-up Deals
Phone, Email Direct Meeting, etc

DEAL WON
Succesfully

Customize your CRM - the way you want

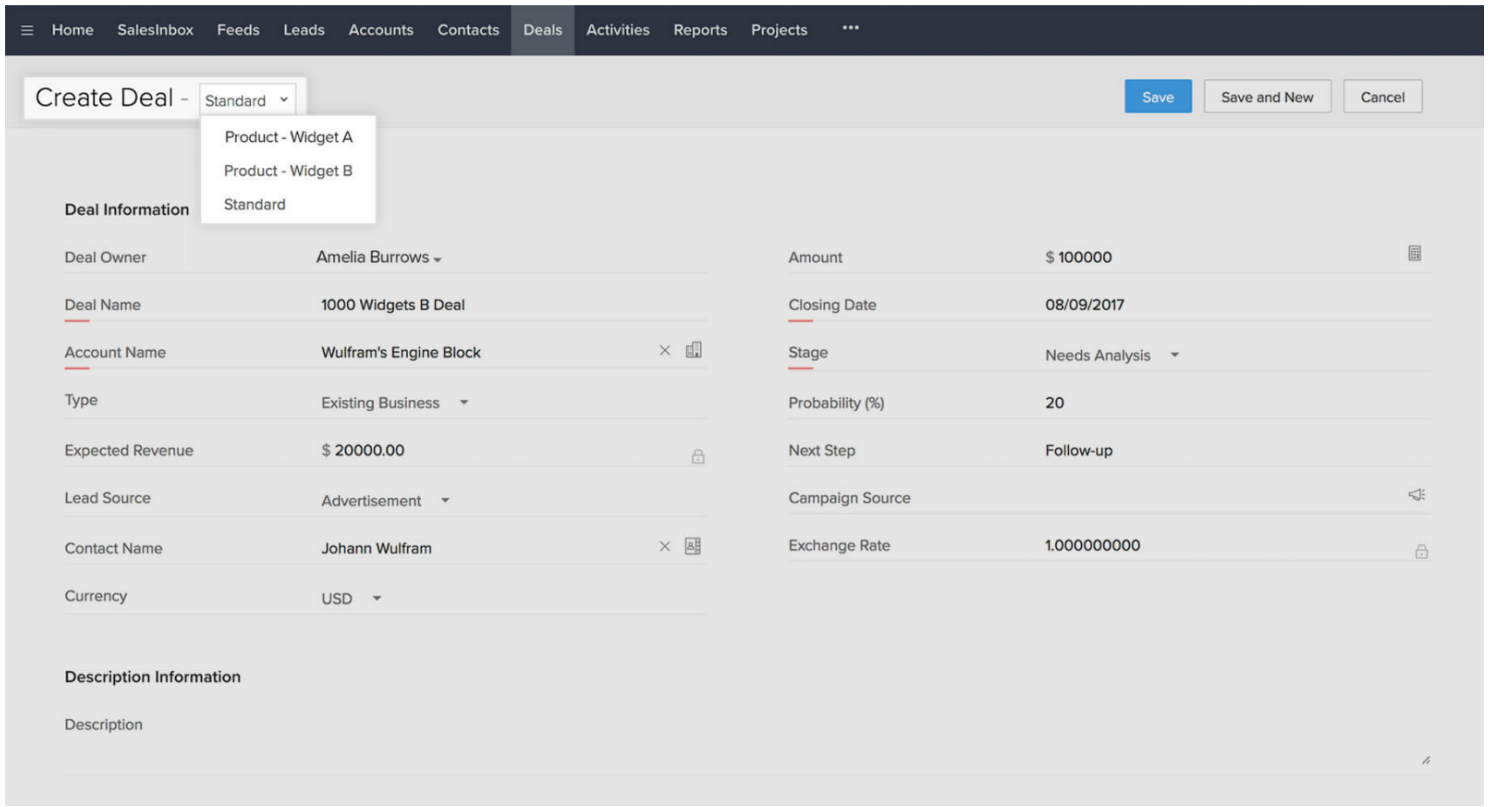
Why learn a new system which can both be tedious and time consuming?

With Zoho CRM, **make the system work for you**. Customize it the way you want, and **close more deals in less time.**

Create advanced filters and narrow down large volumes of leads or deals to the ones that are most important to you.

Advanced Filters

Customize your CRM the way you want



Manage multiple products, branches from one unified CRM system using Page Layouts.

Page Layouts

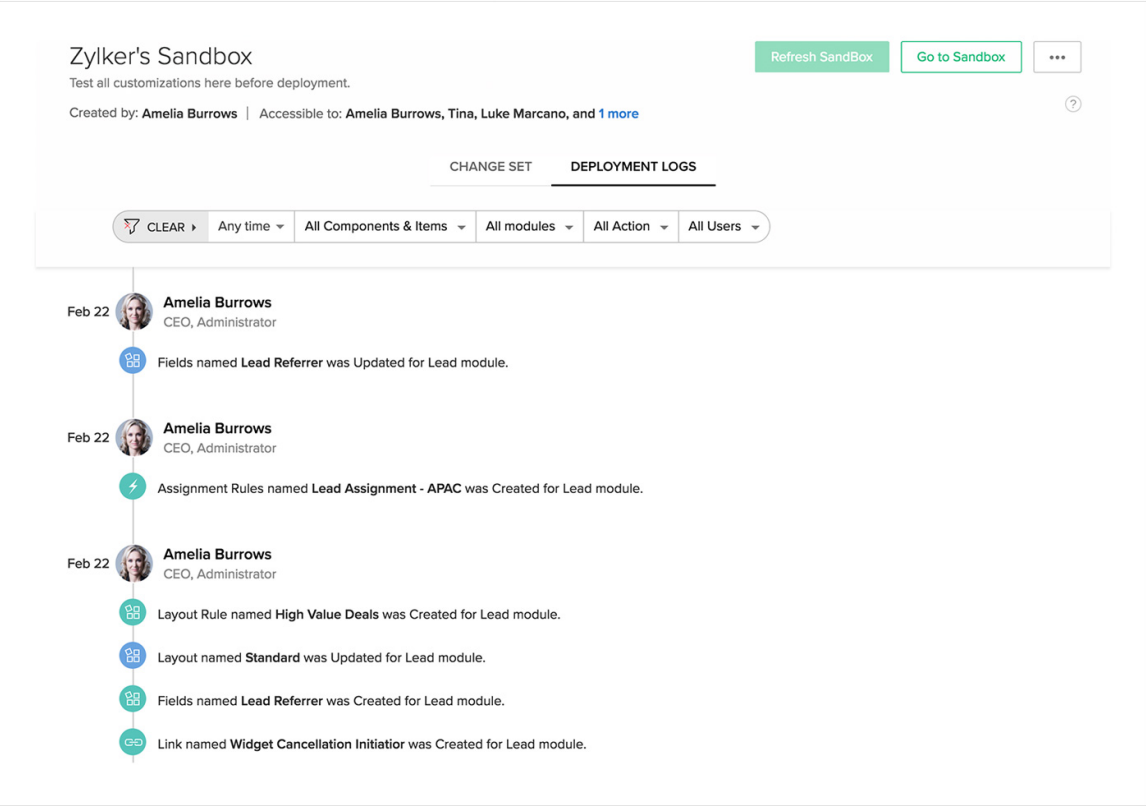
Customize your CRM - the way you want

Play with customization. Deploy with confidence.

With Zoho CRM's **Sandbox** feature, allow developers **create and play with customizations** on your account without accessing your Zoho CRM data.

"Beta test" customizations before deploying the changes to your Zoho CRM account.

Customize your CRM - the way you want



Sharpen your knife before you chop.

Sandbox

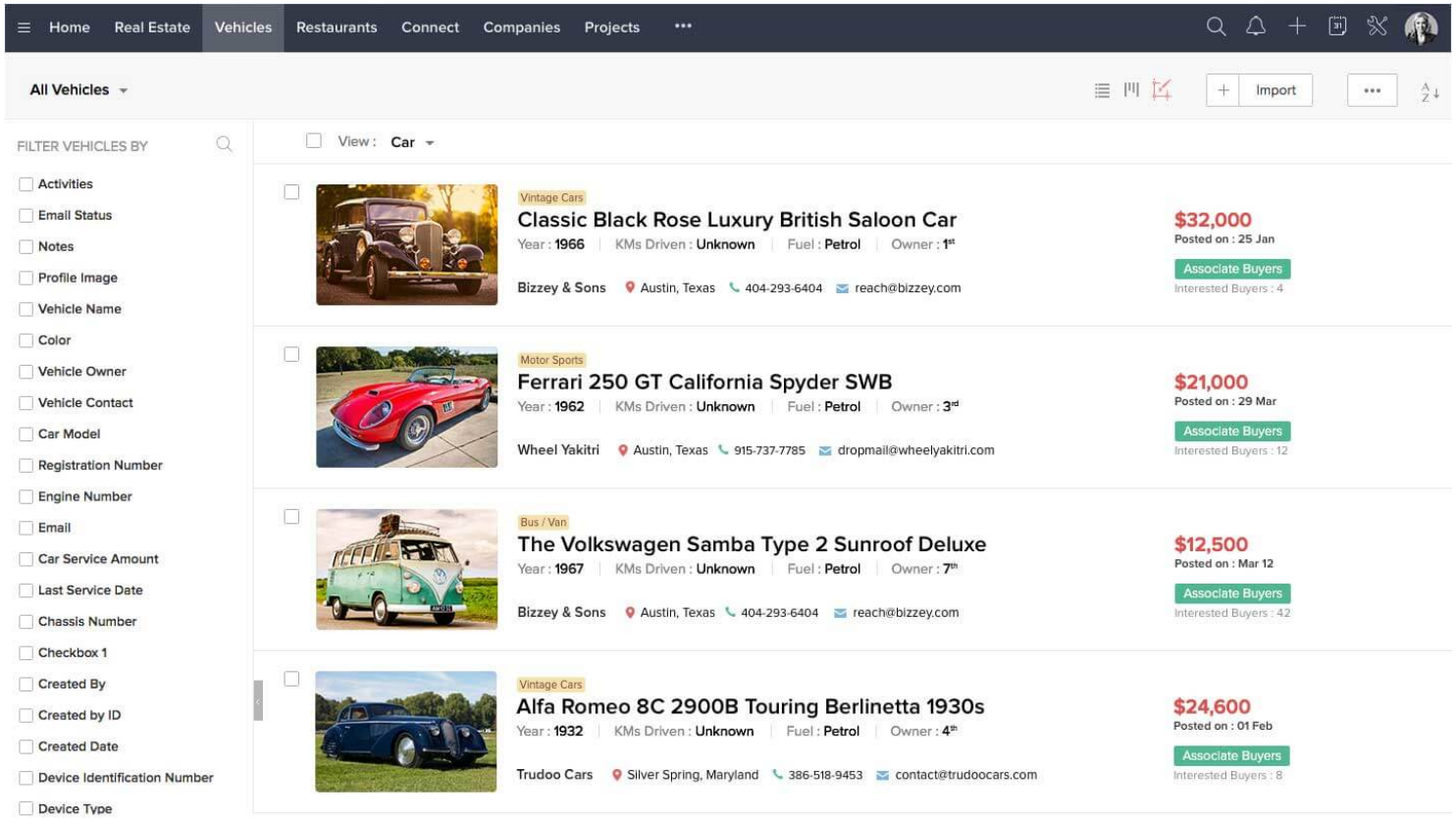
Customize your CRM - the way you want

Go beyond the conventional view with 'Canvas'

Have more than just a tabular data view.

List records the way you want your customers to view, with industry's first-of-its-kind **Canvas view.**

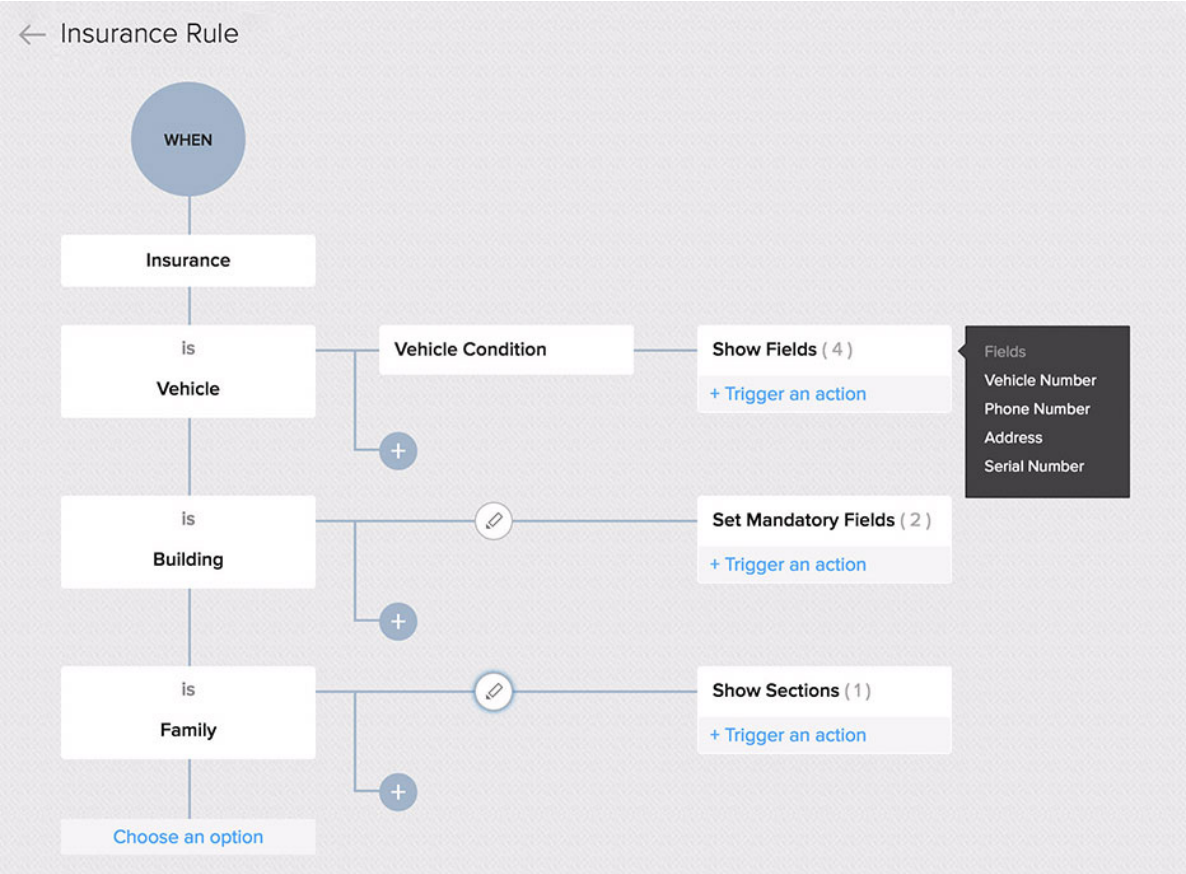
Customize your CRM the way you want



Sculpt an exclusively personalized view of your CRM records.

Canvas

Customize your CRM the way you want



Have multiple products at one place?

Set up conditional fields with Zoho CRM, making lives easier for both the user and your sales team.

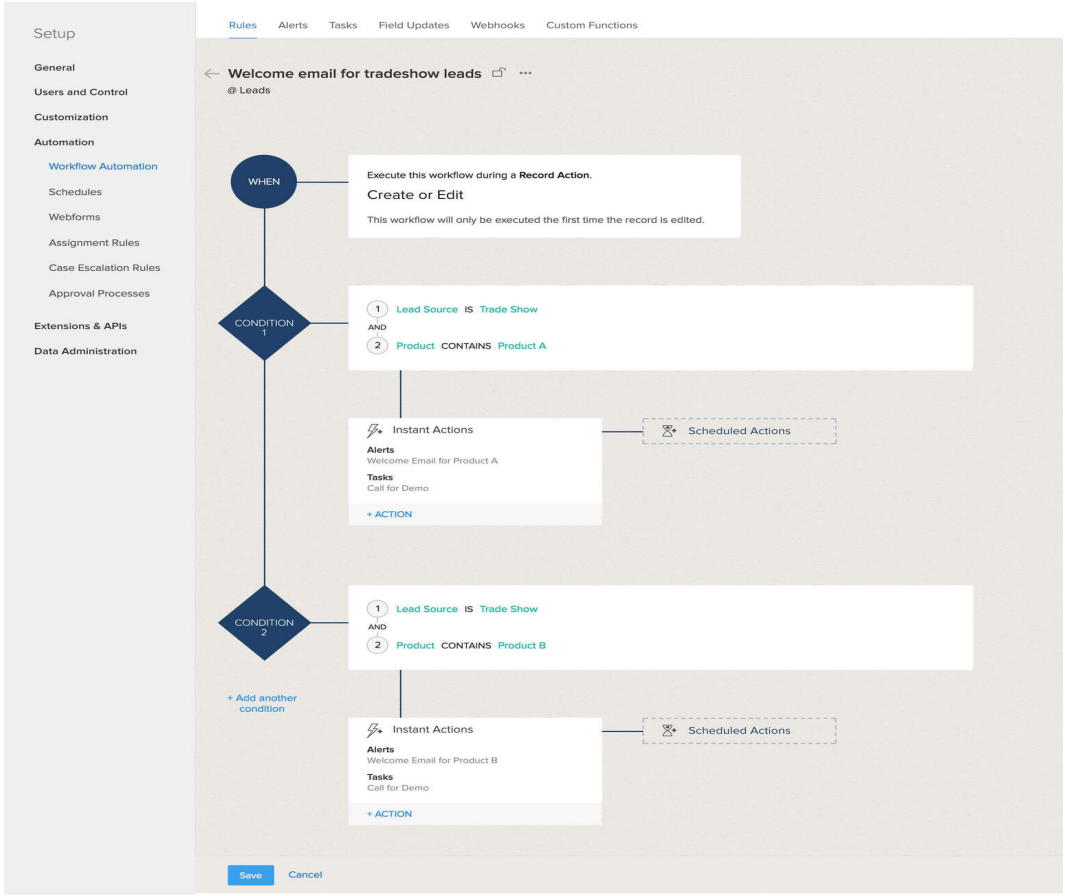
Conditional Fields

Sales Automation

Improve the efficiency and save time of your sales team by **automating routine day to day tasks**.

Create advanced workflow automation from sending automated emails to following up with leads.

Sales Automation

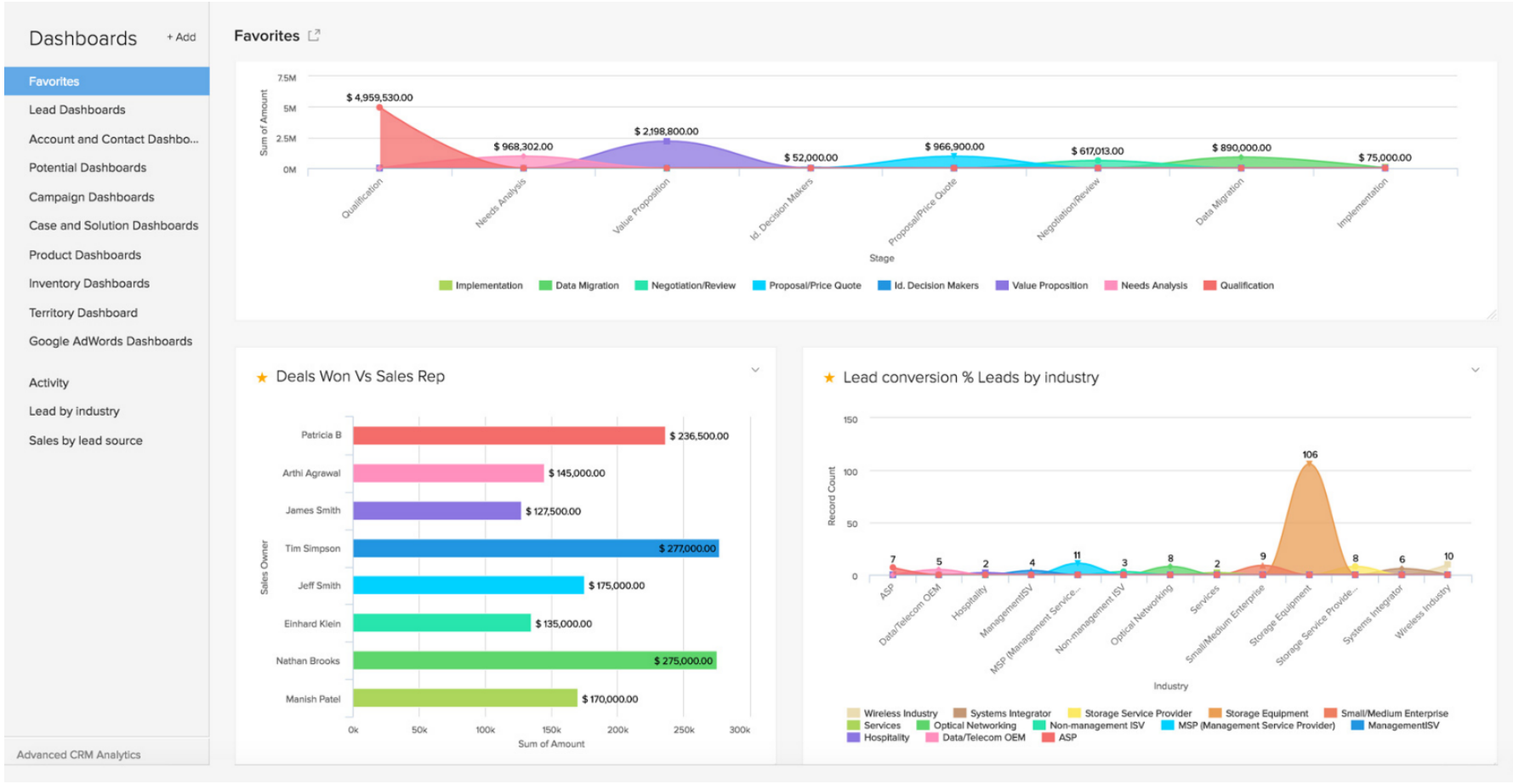


Set up to 10 conditions for a single rule, increasing your productivity 10x.

Workflow Automation

BI and Analytics: Make intelligent decisions

- **Reports -** Advanced reporting lets you build custom reports using the summary, tabular, or matrix views.
- **Organize and Share** your reports to multiple people across your organization. Publish them publicly.
- **Dashboards -** Add sales performance charts, marketing campaign reports, or engagement analytics to your customized dashboard.


Dashboards
+ Add
Favorites
Lead Dashboards
Account and Contact Dashbo...
Potential Dashboards
Campaign Dashboards
Case and Solution Dashboards
Product Dashboards
Inventory Dashboards
Territory Dashboard
Google AdWords Dashboards
Activity
Lead by industry
Sales by lead source
Advanced CRM Analytics
Favorites
Sum of Amount
7.5M
5M
2.5M
0M
$ 4,959,530.00
$ 968,302.00
$ 2,198,800.00
$ 52,000.00
$ 966,900.00
$ 617,013.00
$ 890,000.00
$ 75,000.00
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Proposal/Price Quote
Negotiation/Review
Data Migration
Implementation
Stage
Implementation
Data Migration
Negotiation/Review
Proposal/Price Quote
Id. Decision Makers
Value Proposition
Needs Analysis
Qualification
Deals Won Vs Sales Rep
Sales Owner
Patricia B
$ 236,500.00
Arthi Agrawal
$ 145,000.00
James Smith
$ 127,500.00
Tim Simpson
$ 277,000.00
Jeff Smith
$ 175,000.00
Einhard Klein
$ 135,000.00
Nathan Brooks
$ 275,000.00
Manish Patel
$ 170,000.00
0k
50k
100k
150k
200k
250k
300k
Sum of Amount
Lead conversion % Leads by industry
Record Count
150
100
50
0
7
5
2
4
11
3
8
2
9
106
8
6
10
ASP
Data/Telecom OEM
Hospitality
ManagementISV
MSP (Management Service...
Non-management ISV
Optical Networking
Services
Small/Medium Enterprise
Storage Equipment
Storage Service Provide...
Systems Integrator
Wireless Industry
Industry
Wireless Industry
Systems Integrator
Storage Service Provider
Storage Equipment
Small/Medium Enterprise
Services
Optical Networking
Non-management ISV
MSP (Management Service Provider)
ManagementISV
Hospitality
Data/Telecom OEM
ASP

Catalyst and Developer tools

All you need is a developer to build that **perfect CRM** for you.

It's as simple as that.

Catalyst and Developer tools

Why buy a new product to perform limited functions while you can **build your own functions and embed** them on top of **Zoho CRM?**

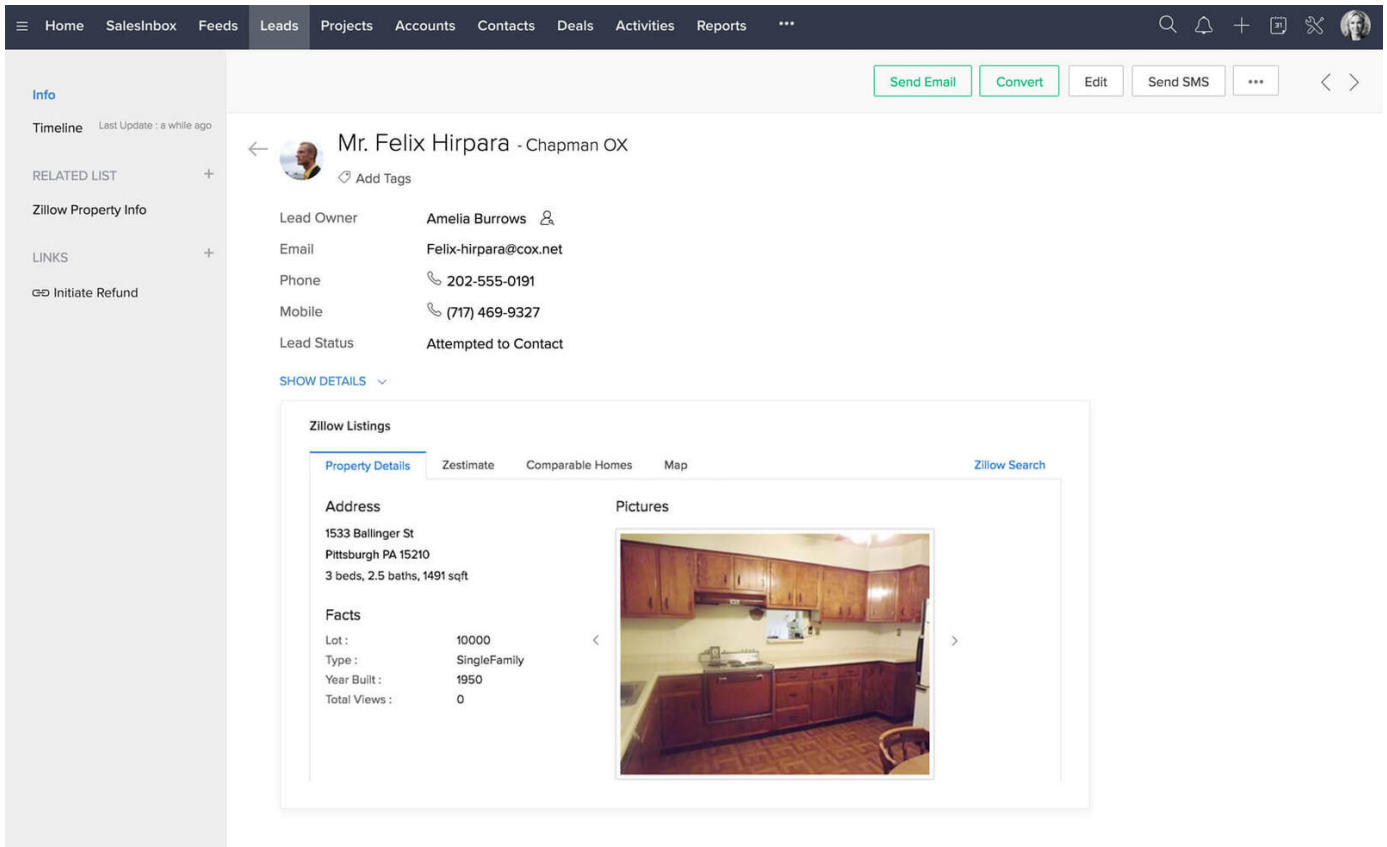
Integrate your functions seamlessly to Zoho CRM with the help of **APIs and SDK support.**

Catalyst and Developer tools

Convert your leads and associate them to CRM accounts through any mobile, web, and voice-based applications using our **dedicated lead conversion API.**

Write new functions on top of Zoho CRM's existing features and **use it all in one place.**

Catalyst and Developer tools



A custom third party widget embedded right inside Zoho CRM

Catalyst

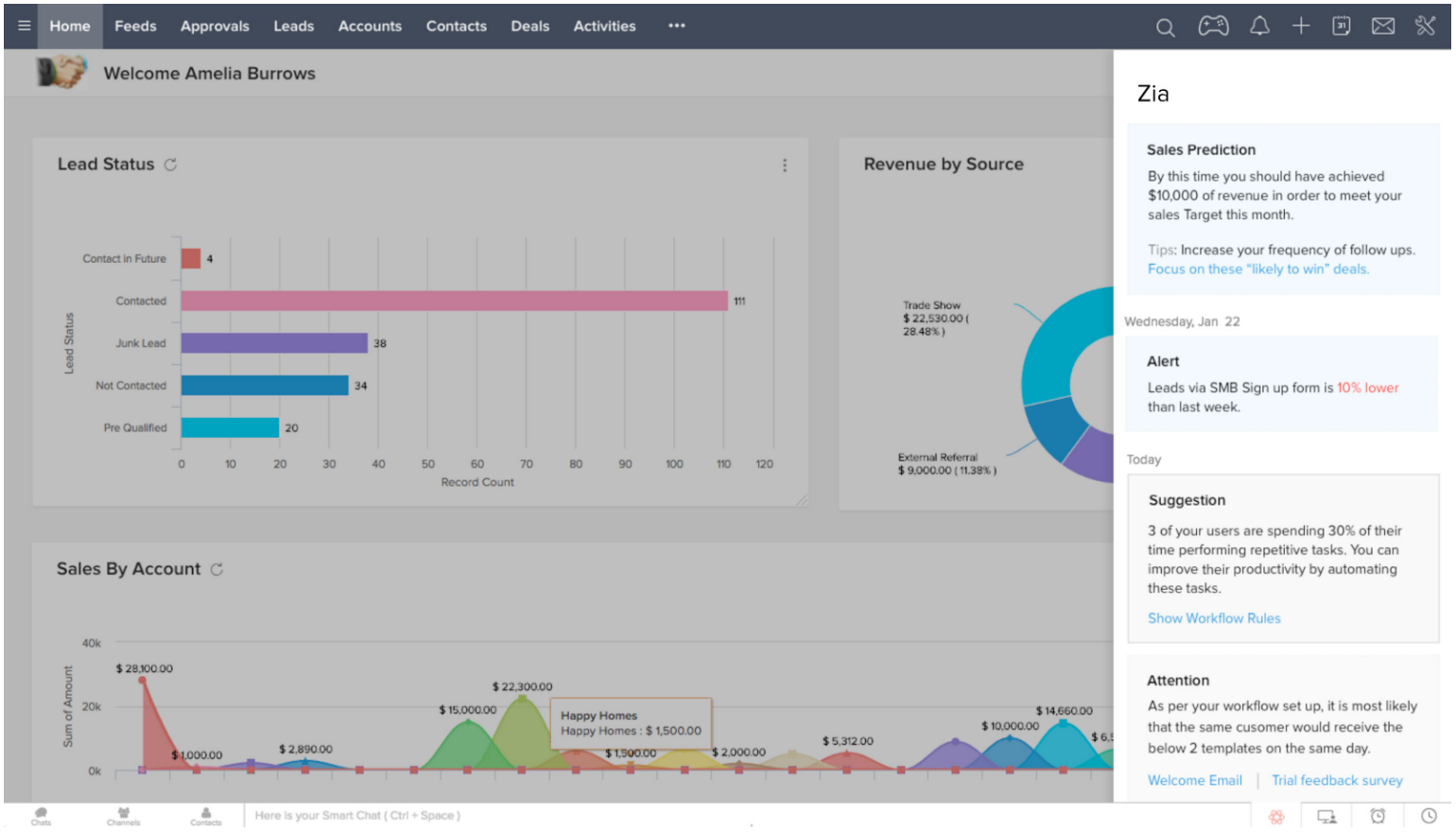
Zia - Artificial Intelligence

In the middle of a meeting and **need a quick report ?**
You have **Zia for the rescue.**
Just ask her.

Know the **best time to contact your customer**, thanks to the advanced artificial intelligence of Zia.

Zia's **deal/lead prediction** compares with your usual win pattern, making lives easier for the sales reps.

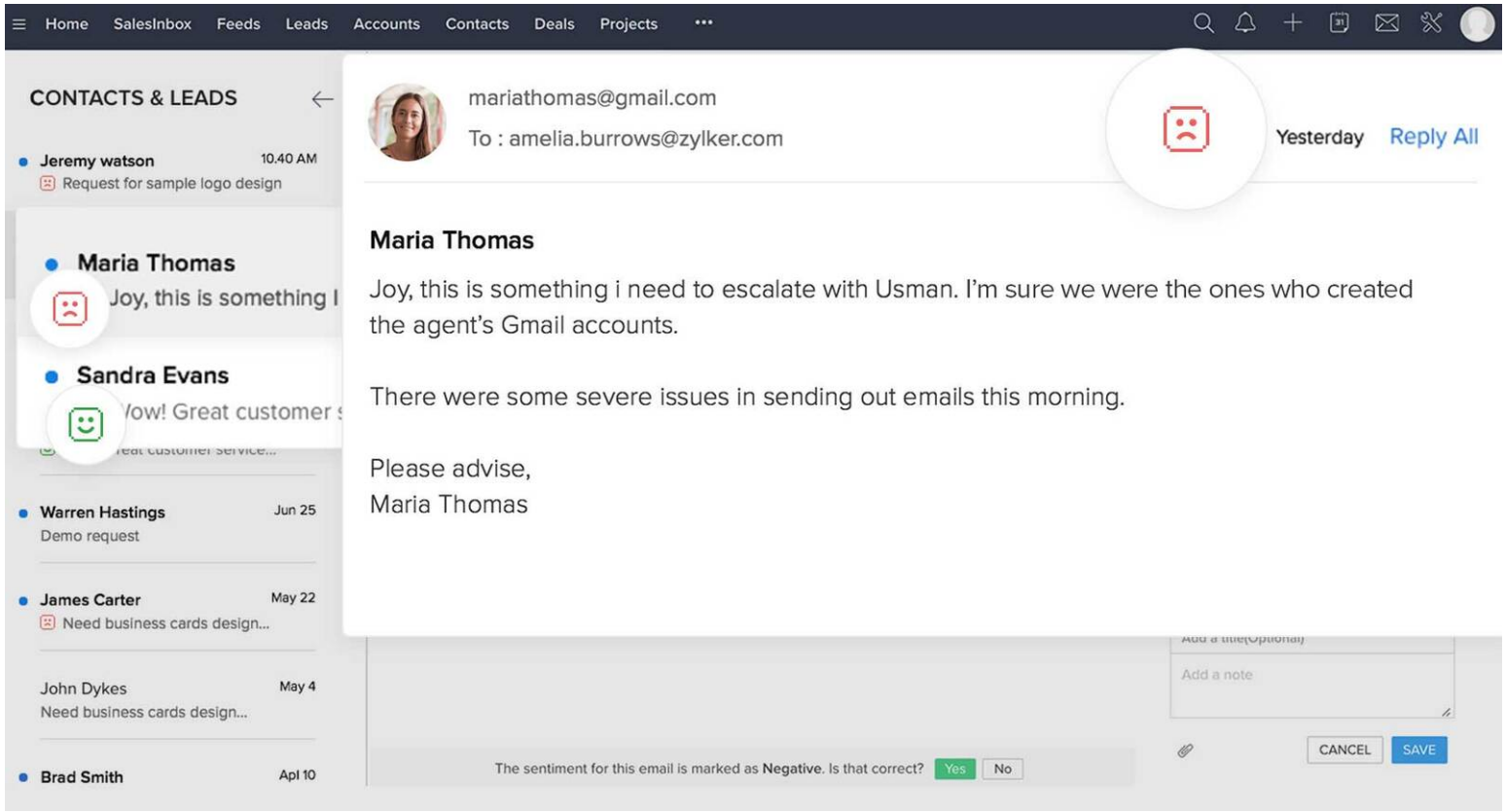
Zia - Artificial Intelligence



You're never stranded. Zia's alert panel actively keeps track of your target.

Zia

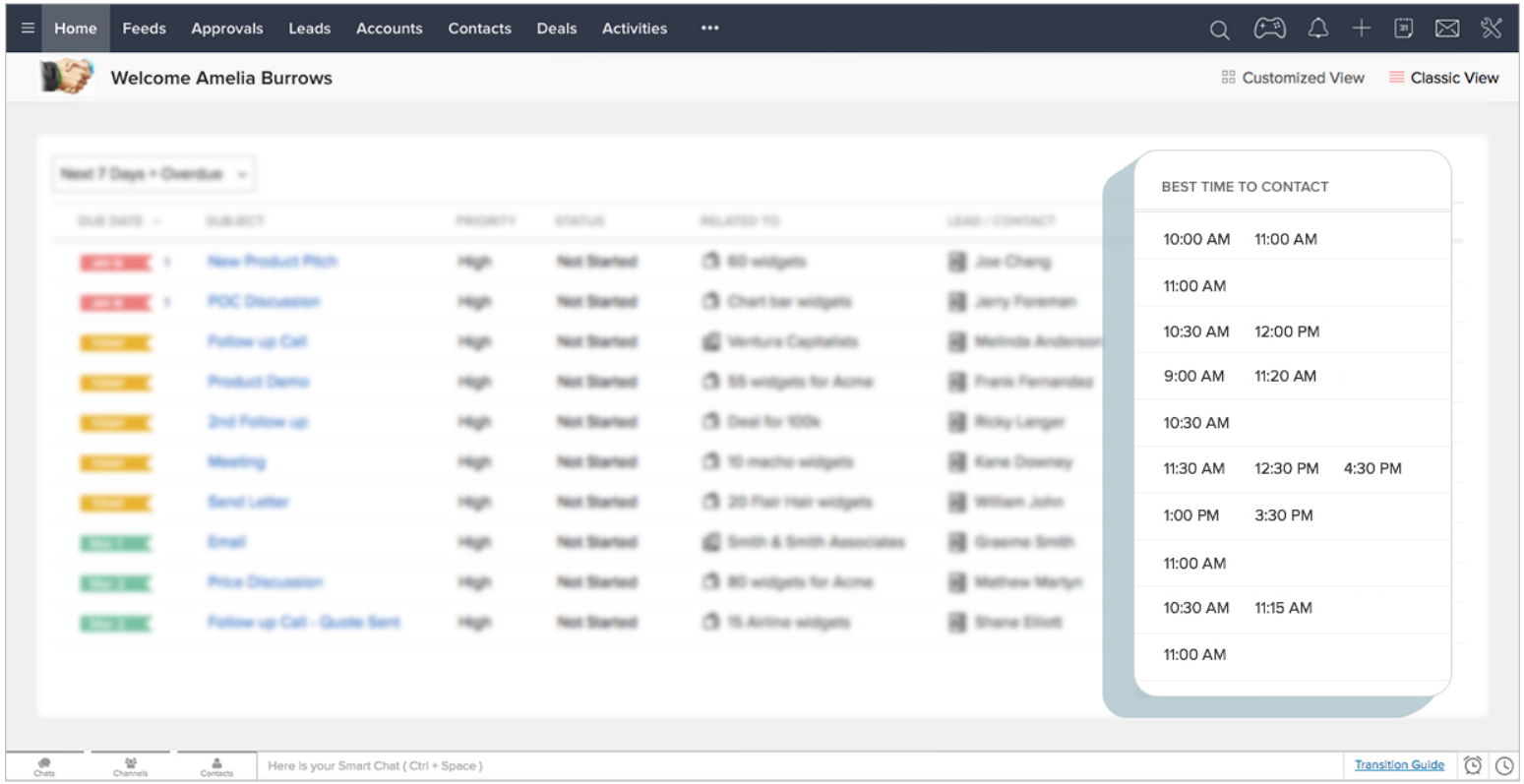
Zia - Artificial Intelligence



Zia analyzes your emails and lets you read your customer's mind.

Email Sentiment

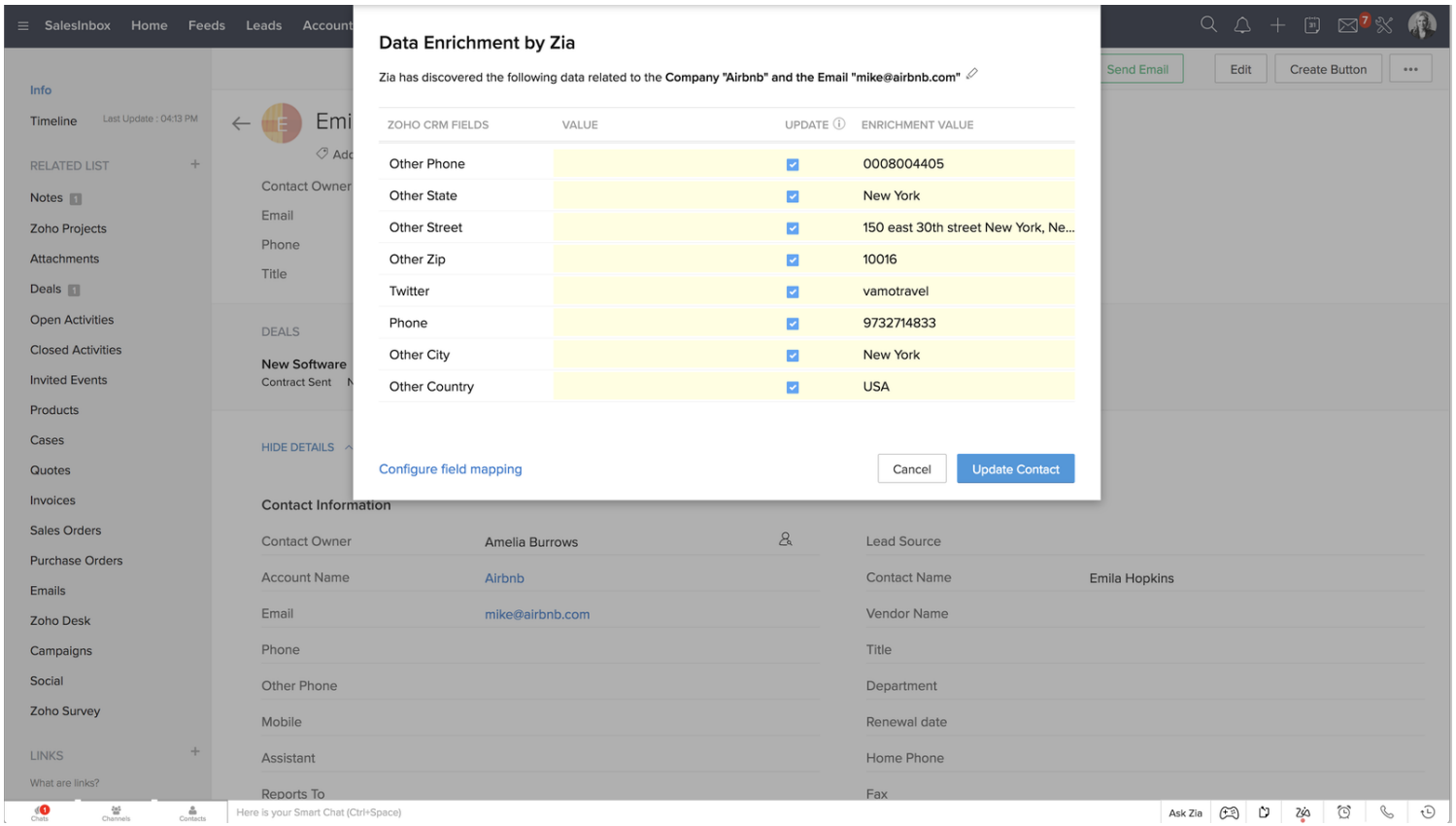
Zia - Artificial Intelligence



Know the best time to make THAT call.

Best Time to Contact

Zia - Artificial Intelligence



Don't worry about incorrect or incomplete data.

Data Enrichment by Zia keeps your data up to date.

Data Enrichment

Zoho Marketplace

Zoho Marketplace - The one stop destination for your extensions

Your business might require a number of tools to perform specific actions, which you wouldn't find integrated within the CRM.

Zoho Marketplace **helps you find extensions that you need,** to make you perform the same task **right inside Zoho CRM.**

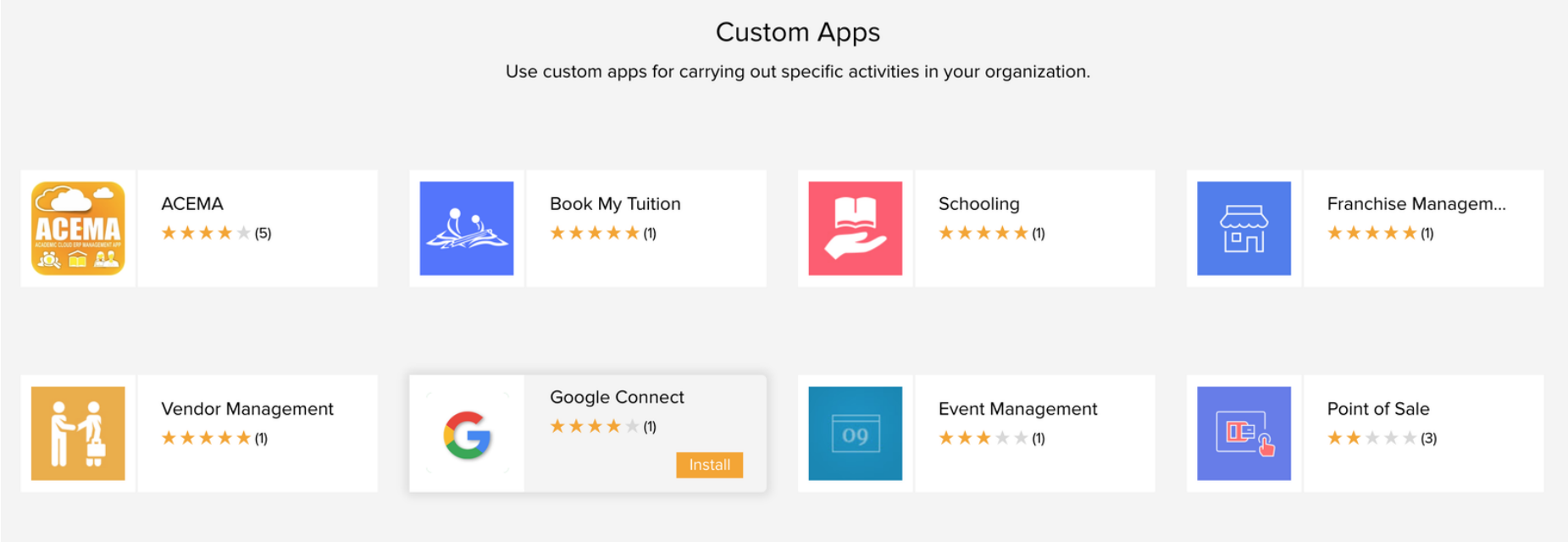
Zoho Marketplace

Zoho CRM

Extend your CRM functionality to do more than what it could originally.

- Foneco ★★★★★ (34)
- SMS Magic ★★★★☆ (54)
- Organization Charts ... ★★★★☆ (14)
- Burst SMS ★★★★☆ (17)
- MyOperator ★★★★★ (8)
- Contactous ★★★★★ (7)
- RingOver ★★★★★ (6)
- Kanban Board ★★★★☆ (7)

Zoho Marketplace



Zoho Marketplace

GoToWebinar

Track leads generated from webinars and get valuable context to nurture leads.

View More

Shopify

Keep track of your customer activities in Shopify, right from within Zoho CRM.

View More

SendinBlue

Manage your marketing campaigns and reports from the Zoho CRM dashboard.

View More

MailChimp

Sync leads, contacts and campaigns, and follow up on your leads with ease.

View More

Eventbrite

Capture all your trade show and event leads, and never lose out on potential deals.

View More

Zendesk

Get contextual information about customers with support tickets in Zendesk.

View More

and much more...

Security and Privacy

- **Our own Data Centers** across the globe with **7x24x365 monitoring**
- **International Security Compliance** - SO/IEC 27001, SOC 2 Type II
- **TLS 1.2 Encryption, SHA 256 based CA**
- **Geo Mirroring of customer data** - For Disaster Recovery, Business Continuity
- **GDPR Compliance**
- **Periodic and need-based Security Audits, Threat Modeling, Penetration Tests and internal audits.**
- **Two-factor authentication, Restricted IPs**

Dedicated data centers around the world

Enterprise Support

- 24x7, throughout the year
- Remote Assistance
- Dedicated Technical Account Manager
- Product Onboarding
- Quarterly report - Feature usage
- Max. Response time of 1 hour

Enterprise CRM Training

- Get **trained by experts** from Zoho
- **In-depth** CRM Training for Administrators to **setup, configure and maintain Zoho CRM**
- Training for **Sales Managers and Sales Representatives**
- **Developer Training** - Customize and **extend your Zoho CRM** capabilities

Thank You