ISSUE #4 ▪ CUSTOMER EXPERIENCE ISSUE

ZOHO BUSINESS PULSE

SOLUTION HIGHLIGHT

Putting sales at the center of team and customer connection

SPECIAL FEATURE

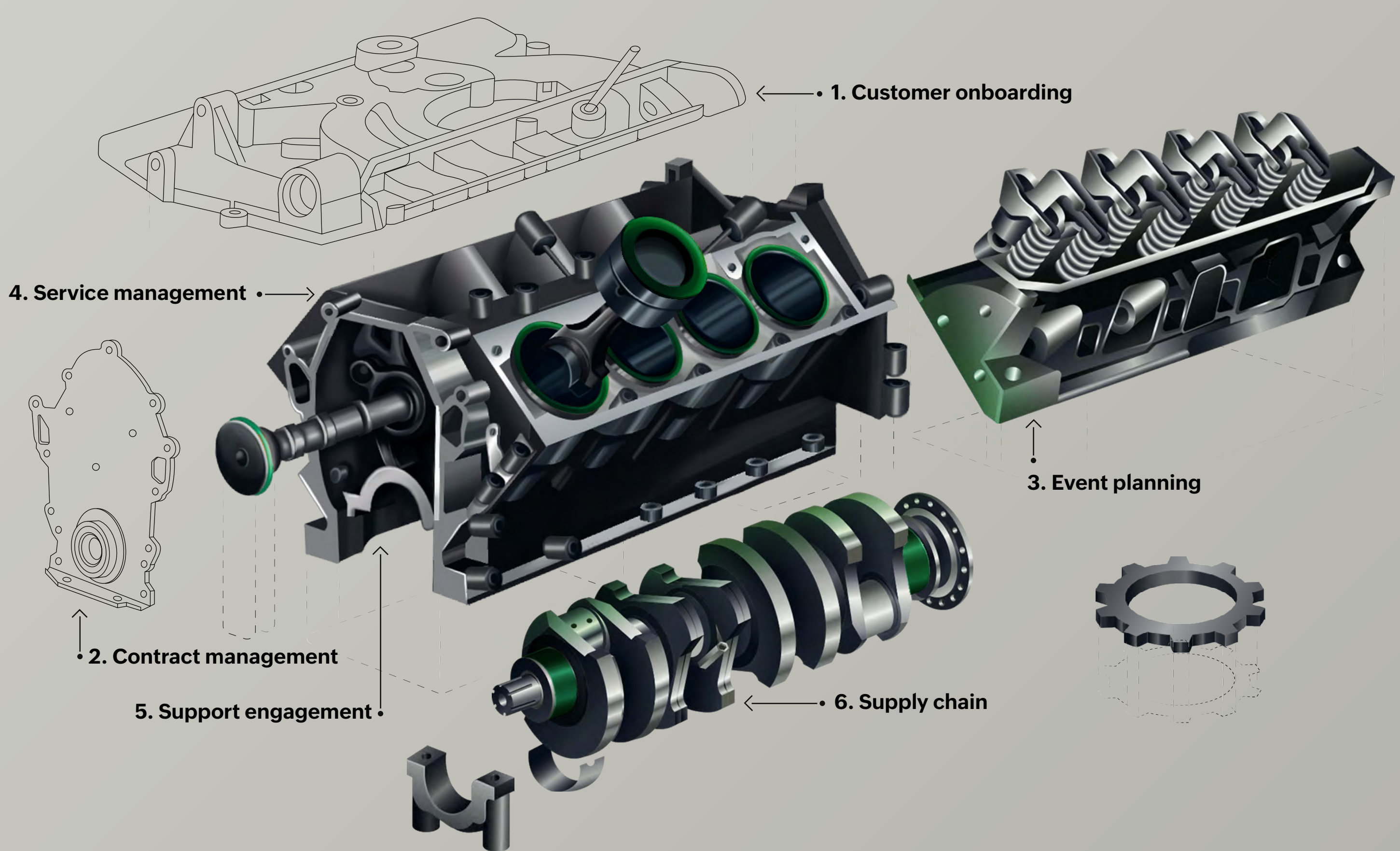
The power of coordinated, contextual, cross-team work management

CASE STUDY

How Zoho CRM helped Toromont CIMCO increase pipeline activity by 30%

Transforming your sales operation into a company-wide coordination engine

Building a connected customer journey inside a more collaborative organization



About Business Pulse

Zoho Business Pulse is a technology magazine tailored to the challenges facing mid-market and enterprise organizations. Each issue centers around a key element of business strategy, offering industry research, thought leadership, and strategic advice to help leverage and extend your current technology ecosystem.

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LETTER FROM THE EDITOR

Sales once consisted of a linear, well-defined process where seasoned pros could rely on intuition and instinct to predict the likelihood of a conversion. The digital, multi-channel buying experience has upended that traditional sales roadmap, which means it's also time for sales strategies and solutions to evolve.

To meet the demands of the "on-demand" buyer, sales reps must shift from a vendor mindset to that of a consultant. That requires an active, strategic focus on building connections, not only with the customer but also among the teams and touchpoints that comprise the entire journey. Moving beyond passive, transactional engagements means empowering sales reps with a comprehensive picture of the customer's unique context. Better data analytics, advanced predictive AI, and modern CX tools offer the possibility of a deeper understanding of customers' values and behaviors, equipping sales agents with the tools they need to confidently guide customers to the best purchasing decisions.

However, technology alone—no matter how powerful—cannot drive the transformation from transactional sales to connection-first sales. Ultimately, culture is key. The sales teams that are ready for this shift have implemented incentive structures that recognize and reward employees, no matter their role, for contributing to positive customer experiences. They're training for active listening and empathetic communication at all stages of the customer journey. They're shifting the focus from closing deals to solving customer problems and adding value. They prioritize long-term relationships and sustained success over quick wins. And they invest in networking opportunities and community involvement to deepen connections. After all, buyers are being pitched to all the time—in the margins of the news sites they visit, on the social media platforms they browse, at the start of every podcast they listen to and every video they watch. In this hyper-saturated, micro-targeted pitch ecosystem, what they really need most is someone who genuinely understands their challenges and can offer meaningful solutions.

This challenging transformation in sales offers enormous opportunities for organizations that can rise to meet it. The ones that succeed will need to not only embrace a culture of excellence when it comes to technology and process but also commit to the organizational discipline required to make sales, marketing, and customer service a connected and coordinated team capable of creating a seamless customer experience. When colleagues become collaborators, the result is fewer misunderstandings, improved efficiency, and tighter alignment around strategic goals. When sales teams—and the companies they drive—find alignment between the human connection and comprehensive data insights, no market is beyond their reach.

EMILY SLOAN-PACE
| Senior Editor

ASK AN EXPERT

What's the **best way to scale** a sales team?

★ ★ ★

Taking a sales team from 5 people to 50 is about much more than expanding headcount. As sales teams grow and mature, so must their strategic approaches and processes. We asked sales experts at Zoho about how they've grown sales forces of all sizes.

Mark Burgener

Mid-Market and Enterprise Sales Manager

“ Pair detailed pipeline metrics with a clear vision for the future

If you want to scale your sales team, you have to get into the nitty-gritty details of pipeline performance. This means measuring the critical elements of the sales cycle—such as pipeline velocity, sales cycle length, and lead-to-customer conversion rates—to identify bottlenecks and drive optimization. A more efficient sales process not only improves productivity but also makes the team inherently more scalable.

However, while you're auditing and optimizing the sales process, it's also important to ensure your team has a clear sense of the evolving vision of the organization. How does each KPI feed into the larger success of the company? Where is the team headed and how can each contributor play a role in its growth? By combining a granular and rigorous understanding of the sales process with a big-picture vision for the team, each AE will have a better understanding of the role they're going to play as well as how fine-tuning the sales process will help the team meet the growing demands of the organization.

“ Designate someone on the team to focus on sales enablement

The bigger your team gets, the more important it is to arm them with the assets they need to close deals. Sales enablement is there to provide the different kinds of collateral and coaching that the team needs at different steps of the sales journey, from the battle cards and scripts used in early conversations all the way to the case studies and presentations that are used to close the deal.

Sales enablement isn't just about support—it's about freeing up reps to spend more time with prospects and customers by optimizing processes elsewhere. If your sales enablement specialist can find opportunities to automate processes that are taking up sales agents' time, that's a huge gain, especially as your team grows.

Alexandra Hantsbarger

Sales Ops Manager

Christian Blood

Director of People Operations for North America

“ Take your time and get it right

Scaling a sales team means strategically investing in the right people who can grow with your organization over the long term. Instead of prioritizing quantity, focus on quality hires. Rushing to grow may result in missteps and compromises that can really delay the development of your sales team. After all, getting a new salesperson up to speed is a costly process, as it can take 6 to 8 months for a new hire to truly understand your process, products, and competitive positioning. Settling for the wrong person just to hit a headcount goal can be a massive waste in terms of time, money, and momentum.

To avoid this, treat every hire as a significant investment. Put in place a rigorous process of interviewing, hiring, and onboarding to ensure every new addition is a long-term asset rather than a liability. No new hire is guaranteed to succeed, but by resisting the urge to cut corners and grow faster than your team can handle, you can avoid squandering valuable time and resources.

VOICE OF THE PRODUCT TEAM

The power of **coordinated, contextual, cross-team** work management

AUTHOR BIO

Prashanth (PVK) Krishnaswami is a **strategic leader** at **Zoho**, currently spearheading upmarket strategy and thought leadership for the CX product group. With over a decade and half of experience, he has played key roles across product marketing, business development, community building, and product management.

There's been a substantial paradigm shift in customer experience. Teams across the company have to come together to make things happen for each customer. It's no longer just about the first sale, but about the entire customer life cycle: from first engagement to successful conversion to ongoing support. The larger an organization is, the more complexity there is in their customer operations, and the more inertia they have to overcome in order to create an efficient and well-oiled customer experience.

In a typical customer journey today, different team members step in at various points with specific responsibilities and different kinds of accountability. For example, to prepare a TCO proposal in a B2B manufacturing process, team members from functions like finance, engineering, procurement, service, and implementation must all come together. Their expertise is unique, and their contributions are not interchangeable. All of these teams will have to do their own deep work in their separate software environments at some point, but there are many stages of the project where it's collaborative value and not individual deep work that's needed.

The problem is that to coordinate their efforts and expertise for these collaborative stages, these teams may be forced to use a combination of 4-5 different applications, like email clients, chat or messaging apps, spreadsheets, task management tools, and even some bespoke utility tools.

Therein lies the fundamental contradiction: the majority of customer context lives in one platform (the CRM), while the vast majority of customer operations activities take place in a combination of other tools that hold little to no customer context. This results in (at least) two distinct levels of inefficiency. Not only is it inefficient to use a combination of tools to communicate and coordinate a string of critical activities but it's also counter-productive to conduct those activities away from the latest customer context.

Together, these two drivers of inefficiency manifest in outcomes like delivering inadequate experiences to customers, taking too long to process simple items, responsibilities falling through the cracks, and incomplete visibility into all these activities for leaders who are orchestrating this customer experience. On top of these, most organizations are rushing to adopt AI at a feverish pace. What good can AI do to an organization whose fundamental work orchestration is a mess, and whose underlying data is scattered across so many different tools? This is not a problem that AI can fix, but rather something that requires humans to streamline by themselves before AI can step in and do its magic.

A pragmatic approach to fixing these inefficiencies is simply to orchestrate all of these critical customer operations activities inside the CRM, rather than elsewhere. As obvious as that sounds, it hasn't become the norm yet, largely due to the traditional model of the CRM: a system that is built by IT for sales teams. As a result, CRM's scope has been limited to sales use cases, access to it has been severely rationed, team-level customization has been curtailed, and it has become a system that prioritizes internal efficiency rather than value to the customer. Incremental improvements to this outdated paradigm can't transform an organization's CX outcomes.

The requirements for breaking out of this outdated model are fairly straightforward. Each team involved in the customer journey needs to be in the CRM. They need to have their own dedicated space, in which they can blend common customer context with their own unique work elements, apply their own data permissions, manage their processes with flexibility, and track the impact of their work. They need visibility into the continuous journey of each customer. And they need the power to manage their software environment by themselves, without creating a massive bottleneck or governance nightmare for IT teams.

Zoho CRM: Meeting the challenge of unified customer experience

Embracing the future of collaborative sales, the team behind Zoho CRM has been hard at work creating a revolutionary new approach to org-wide collaboration. Dubbed "CRM for Everyone," this powerful set of feature updates will change how your company operates. Read on to learn more about CRM for Everyone!

COMING SOON

CRM for Everyone

Inter-team coordination for better context across the customer journey

Currently in **Early Access** for existing users, CRM for Everyone simplifies the complexities of cross-team coordination by housing customer-facing processes in the same system as customer data. When the boundaries between teams (and their data) are lowered, companies experience better operational efficiency, greater data accuracy, and an increase in data-driven decision-making. Slated for launch in mid-2025, check out this preview of what's to come in Zoho CRM.

Fewer siloes and more connected operations

Optimize processes with Team Modules

Create modules customized to each team's key activities, configured with the specific workflows, processes, and data permissions they need for a more focused and efficient experience. Informed by the context of the Team Module, an all-new primary and secondary sidebar displays quick controls, navigational shortcuts, and configurable quick actions.

Improve coordination with Team Spaces

Give customer-facing teams a dedicated space to create and store organizational and team-level modules. The easily configurable UI allows admins to customize the layout of each space, displaying only the folders and process modules relevant to their specific team. Keep teams focused by replacing clutter with a streamlined workspace, and improve coordination between teams both inside and outside sales.

Track key tasks across the org with Requests

When teams work across multiple channels and tools, it's easy to miss a message about creating a case study or generating a new contract. With the Request tab in CRM for Everyone, users can create tasks and activities for other teams, and then monitor the status of those tasks as they move toward completion. Keep your entire organization in sync with real-time visibility into the progress of other departments.

Flexible, transparent, and decentralized work management

Reduced bottlenecks with Team-Level Admins

Decrease dependency on central IT software development teams with Team Module Admins. Designate a Module Admin to manage team-specific changes including role provisioning, process creation, and custom field setup. Instead of waiting on central admins to make changes to permissions or the UI, teams have the control they need to organize their work efficiently. Reduce backend delays and free sysadmins to focus on central IT priorities with new support for Module Admins.

Deep insights with the Interactions Tab

The Interactions tab gives teams an omnichannel view of every engagement a customer has had with the company. Teams can drill down into customer engagement data from different Zoho apps to see website visits, customer engagement milestones, and associated follow-up activities and outcomes. This cause-and-effect view of the customer journey replaces patchwork campaign lists with usable insights and visual clarity.

More flexible deployment with Team Licenses

Involve key collaborators in specific stages of the customer journey, rather than providing full access to your entire CRM. New team-level licenses grant access to individual modules, enabling secure, centralized collaboration across the customer journey. With this new licensing model, bringing customer-facing processes into CRM doesn't require buying every team member a seat in CRM.

Interested in getting early access to Zoho for Everyone?

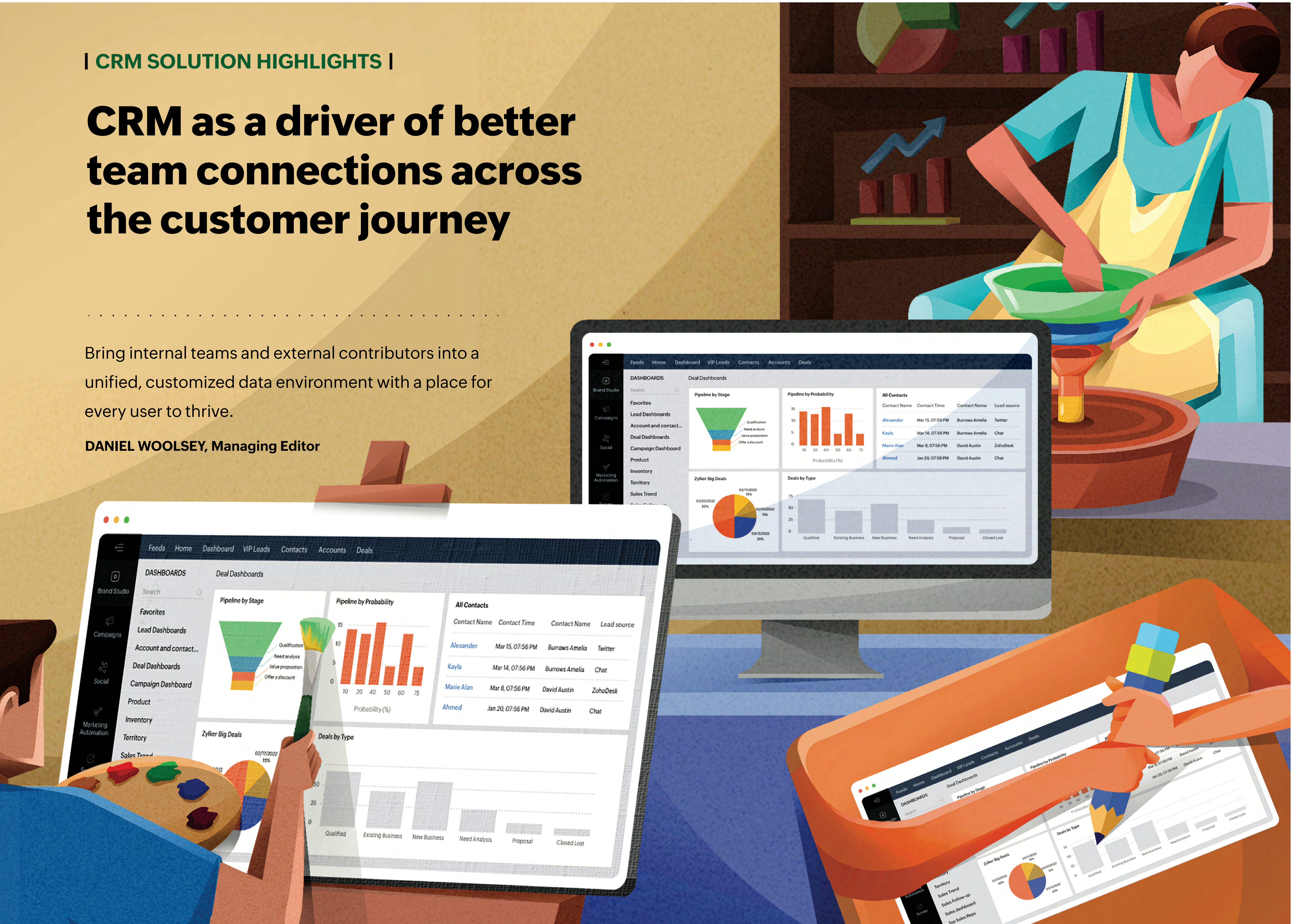
Visit our website to learn more about this exciting upcoming feature release and join our early access list.

| CRM SOLUTION HIGHLIGHTS |

CRM as a driver of better team connections across the customer journey

Bring internal teams and external contributors into a unified, customized data environment with a place for every user to thrive.

DANIEL WOOLSEY, Managing Editor



Sales teams are at the heart of their companies' success, benefiting from a unique connection to the customer and opportunities for deep synergy with other customer- oriented teams. Sales engagements generate enormous amounts of information about customers' wants and needs, but the tools that power sales teams' work can seem inaccessible or unuseful to other users in need of those insights. Fractured workflows that treat customer engagement, data management, and inter-team coordination as separate digital realms can lead to disconnected work and unsatisfying customer journeys.

The customizable digital environment of Zoho CRM gives sales teams and their collaborators new opportunities for connection and coordination. Deeply custom interfaces lower barriers to CRM use for teams outside the sales operation; customized sales cadence automation can bring trust-building consistency to customer engagement; and purpose-built portals bring external processes into the CRM environment for better data management and reporting.

In this installment of Zoho Solution Highlights, we'll explore sales features that are redefining the user interface, automating sales communication, and streamlining external collaboration.

Canvas Design Studio

Sales Cadences

Custom Portals

CRM SOLUTION HIGHLIGHTS

Canvas Design Studio

Custom UI builder for optimizing usability and increasing CRM adoption

Lower barriers to CRM usage for teams in sales and beyond with unique user interfaces that reflect each team's priorities and workflow.

PROBLEM

Users who are struggling to access the data they need will be unmotivated to use the CRM for their work.

Getting teams to adopt and consistently use a CRM can be a struggle, and the usability of the UI is often a sticking point. Many of the teams that should be using the CRM have very different needs as far as which modules and what information they need to access frequently—when a sales rep calls a lead, they need to see accounts, deals, potentials, and activities, while a support agent working on a ticket might need to quickly see purchases, subscriptions, and previous tickets. A billing specialist might need to skip all of that and see payment history and open invoices instead. Giving all of these types of information equal weight and prominence would inconvenience all three teams, so all CRM software offers some ability to customize layouts for individual teams' needs. However, while typical custom layout functionality provides some flexibility in what information is displayed and in what order, the UI generally retains its overall look and feel.

When the CRM interface doesn't feel dialed-in for a user or team, the likelihood of successful software adoption drops. Users who are reluctant or on the fence about using the software may take the friction in the user experience as a reason to use other unsanctioned, untrackable systems—such as personal spreadsheets or notes apps—for their daily work instead. Whether that means they spend time copying information back into the CRM from that other system, or don't enter their data into the CRM at all, either one represents a huge data management issue and loss of efficiency.

SOLUTION

Lower the barrier to CRM usage by customizing the UI for each team's needs.

Using the drag-and-drop Canvas design studio, build no-code custom CRM interfaces that go a step beyond usability, and make your CRM feel easy and useful for all of your teams. Combine fields, tabs, and sections to place each team's most essential information easily within reach. Use conditional styling, graphic labels, and custom backgrounds to make high-priority fields and actions pop visually, and spotlight essential queue or pipeline figures in quick-view boxes where they can always be seen. Arrange modules and lists more densely using custom horizontal tabs for navigation, or spread them vertically for a simpler view. To solve the problem of competing information needs, different teams and roles can have their own Canvas layouts dialed in to their specific tasks and modules.

USE-CASE SCENARIO

A home security company leases security systems to homeowners and provides service after installation. The sales, marketing, service, and accounting departments all use different sets of customer information in their work, but the company's default CRM layout is optimized for sales and marketing activities. As a result, the accounting department records customer interactions and contact info updates in their accounting solution, while the service department keeps their records in spreadsheets and their scheduling software, and neither uses the CRM solution beyond occasionally looking up a piece of customer information.

To centralize the different teams' work, the company uses Canvas to make three separate CRM interfaces, each designed to make CRM feel like a simple, easy-to-use tool for a specific team. The sales team's view makes it easy to see and update deal stages, sorts leads by priority, and visually highlights company information like location and size. The service team's view is uncluttered, like the spreadsheets and logbooks they've been using—instead of deal information, it just gives easy access to current accounts' locations, equipment types, and service schedules. And the accounting team's view shows current accounts' invoices, subscriptions, and payment history in the same order and using the same field labels as their accounting software. Because each team's interface is designed around not only the information they need, but the format that meshes best with their existing workflow, users on all of the teams feel like the CRM is manageable and reasonable to use. And with all of the teams fluently looking up and updating information in their own CRM view, the CRM as a whole becomes a much more complete, reliable record of the customer journey.

OUTCOME

A more efficient CRM that drives greater utilization across the organization

A better CRM user experience delivers better results for both users and customers. When the most important information and highest priority tasks for each user's role are easy to find and update, users in every role are more likely to work directly in the CRM instead of working around it. This makes for more efficient workflows, which leads to delivering deals, solutions, and resolutions to the customer faster and more accurately.

Improving the usability of the CRM for every team also makes CRM data a more robust, secure, democratically shared resource. With multiple Canvas views in the same CRM, improving usability for one team doesn't sacrifice the user experience for other teams. This usability and ease of access eliminates a common reason for teams to stash customer data in less-secure systems before entering it in CRM, reducing the risk of important sales data going missing. With more users contributing to more complete and consistent customer records, the pool of customer information gets bigger, more secure, and more useful for every team.

CRM SOLUTION HIGHLIGHTS

Sales Cadences

Outreach automation for more consistent sales communications

Make sales engagement consistent, responsive, and effortless with customized, automated sales cadences.

PROBLEM

Manually tracking prospects' progress throughout your sales process is an extra recordkeeping burden.

Connecting with prospects through a predefined cadence of emails, calls, and other sales touchpoints is a best practice that builds trust and drives conversions, but to apply it consistently is a logistical challenge. Because each prospect enters the sales cadence at a different time, ensuring that they receive the next touchpoint isn't as simple as sending everyone the same email at the same time. Tracking each individual prospect's next needed contact as they progress through the cadence puts a heavy burden on sales reps to make sure that information is up to date; if an update is missed, it runs the risk that a prospect will get a repeat of the last touchpoint, eroding the impression of consistency and diligence that the cadence is meant to convey.

While marketing campaign tools are excellent at sending automated sequences of emails to batches of recipients, they're not designed to incorporate other important sales touchpoints like phone calls or personalized InMail messages. And when these tools aren't part of the CRM ecosystem, sales reps still need to make sure that the CRM record for each prospect is up to date on what sales touchpoints have been completed. Managing cadences this way eats up the sales team's time with recordkeeping and low-ROI routine communication, limiting the time they have for giving one-on-one attention to prospects who are ready to convert.

SOLUTION

Automate custom sales cadences that enroll and unenroll prospects based on custom conditions in CRM.

To simplify the process of managing prospects in sales cadences, automate them to run in the background of your CRM. When you build a Cadence in Zoho CRM, you can design the sequence of sales touchpoints including emails, calls, and sales rep tasks. Emails are composed while building the Cadence and sent to prospects automatically in the proper sequence, while calls and tasks are added to the responsible sales rep's calendar at the appropriate time. Cadences can have branching options, so that a response like opening an email or clicking a link can shift the prospect into a more targeted version of the cadence.

To lighten the burden on sales teams' time, Cadences enroll and unenroll recipients automatically based on custom criteria in the contact record. When the field chosen as the enrollment criterion matches the condition for the Cadence, the prospect or lead is enrolled and starts receiving the sequence of sales touchpoints. If that field is updated to a status that doesn't match the Cadence's eligibility filter, the prospect or lead is removed automatically and won't receive any more communications in that cadence. Teams can build multiple cadences within the same CRM, so if the prospect's new status makes them eligible for a different sales cadence, they'll be added to that one automatically when the condition field is updated.

USE-CASE SCENARIO

A mortgage lender's agents need to keep prospective borrowers engaged throughout their home-buying journey. Many borrowers shop around for other lenders while they're searching for a house to buy, so the agents email or call their prospective borrowers every few days with an inquiry about the status of their house search or a piece of helpful information about the buying process or loan types. It's time-consuming to keep track of which borrowers have received which emails, and sometimes an agent loses track and sends a borrower the same question or piece of advice twice in a row.

To simplify the process, the mortgage team manager creates two cadences that filter contacts by two custom CRM fields: Qualification Status and Purchase Stage. When a contact is marked as prequalified and searching for property, they enter the first cadence and receive an initial email. The next two emails go out automatically, and after that, a call appears on the agent's schedule to let them know it's time to follow up. If the agent updates the contact's purchase stage to "making an offer," they're immediately unenrolled from that cadence. Meanwhile, the second cadence, which filters for borrowers who are making an offer, enrolls the contact automatically and starts placing a different sequence of personal check-in calls and coordination tasks on the agent's schedule. With the routine sales cadence emails being automatically sequenced and sent, and the stage-appropriate calls and tasks automatically populated in agents' schedules, the sales team doesn't have to spend time tracking what was last sent and when. Instead, they can let the cadences run while they focus on providing hands-on help for borrowers in the crucial final stages of closing.

OUTCOME

More consistent prospect engagement, more complete records, and more sales team capacity to focus on high-impact opportunities

With Cadences managing the sequence of sales touchpoints, sales reps' outreach to prospects becomes more consistent without sounding generic or mechanical. The increased consistency helps to build trust and reputation with prospects and move the needle further toward conversion without spending additional sales team time. Because Cadences are managed through CRM, every contact record has a more complete and accurate picture of how they've been engaged, which puts teams from sales to support in a better position to serve those accounts in the future.

With the sales team making more use of time-saving automations, the sales funnel as a whole becomes smoother and less prone to bottlenecks. The marketing team's flow of qualified leads pours into a smoothly-running sales queue, where the time savings from set-and-forget sales cadences leaves the sales team with enough time and energy to focus on winning the deals that are ready to convert.

Custom Portals

Customized CRM access for your external collaborators

Give external users a secure window into your organizational CRM, where they can create and modify records within modules and fields you've chosen.

PROBLEM

External users' contributions aren't well integrated into CRM for follow-up and reporting.

External collaborators—like affiliate lead generators or contracted agents—can be extremely valuable components of a sales organization, but their work inherently takes place outside of the company's data structure. This presents a workflow problem for essential processes like adding leads and customers to the company's CRM, updating those records to reflect lead status or follow-up activities, calculating commissions, and evaluating affiliate program outcomes.

If external team members keep their lead and contact records in their own data systems and send copies of that information to the company, it creates two overlapping, but not necessarily identical sets of records. That makes it difficult to know which set has the more complete and current information at any given time. Adding those external sources of data to the company CRM means repeated data imports, and if external users are continuing to generate updated information, those data imports can easily become messy, redundant, and extremely time-consuming. But it's not feasible to skip adding that data to CRM; it's essential if the company wants to be able to run reports using the data coming from those external sources, or analyze the performance or value of the external collaboration.

SOLUTION

Give external users secure access to create and update records in selected CRM modules.

Eliminate data import problems and maintain a single source of truth for CRM data by allowing external users to view, create, and manage their records directly in your CRM. With customizable user types and module- and field-level permissions, portals allow external users to work in the sales organization's CRM environment without compromising its security. When external users are invited to access the portal, the CRM owner has the opportunity to decide which modules each user will have access to, which fields within the module they'll be able to see, and what kinds of actions they can perform in records they're associated with.

With this access, an external affiliate can add a new contact, then return later to add notes or new information they've gained directly into CRM instead of a separate external data system. The records that the external user creates remain linked to that user, allowing the CRM owner to easily see each external collaborator's productivity, audit trail, and the quality and outcomes of the records they're creating. Because records created by portal users immediately become part of the CRM, they're also incorporated into CRM analytics, so everything from commission calculation to affiliate program evaluation can be performed in the same reporting environment.

USE-CASE SCENARIO

An ecommerce platform uses affiliates to generate leads for merchants who might want to sell their goods on the platform. The affiliates use their own websites to capture contact information, then email it to the platform's sales team every month to be imported into CRM. Sometimes, affiliates will add follow-up details to a lead they've already sent, either in a separate email or on the next monthly spreadsheet, so the sales team needs to keep an eye out for both overlooked information in emails and duplicate records during import. The amount of work the sales team is doing to manage the incoming lead data is cutting into the time they're spending actually selling to those leads.

To standardize the flow of lead information, the platform implements a portal and invites all of its current affiliates as users. When affiliates log in to the portal, they can either create new records or search and edit records they've already created. Now, new leads come directly into CRM, where the sales team can work on them immediately. If affiliates obtain new information for an existing lead, they can search and edit the record themselves. From the sales team's perspective, the time they were spending on managing incoming lead data from affiliates has been freed up for selling. From the sales leader's perspective, the affiliates are now taking more responsibility for delivering their data all the way to where it can be used, reducing the overhead of the affiliate program and improving its ROI.

OUTCOME

More streamlined, accountable collaboration processes that improve reporting and free up sales teams' time

With external users adding their contributions in CRM directly, there's a single source of truth for the entire sales operation, eliminating the need for additional data environments that need to be reconciled with CRM. The streamlined data workflow, in which the users generating the data are the ones to enter it in CRM, reduces the opportunities for information to be overlooked or copied incorrectly, and ensures that external team members' work is being completely captured. This in turn improves the reliability of sales reporting, leading to a more accurate view of the sales pipeline and more detailed analysis of sales strategies and outcomes.

Allowing portal users to work directly in CRM also eliminates the need for sales or admin personnel to perform data entry for external partners. With this overhead task eliminated, sales teams gain more time for valuable pipeline activities. And when external team members are in charge of how their data is added to CRM, there's additional transparency and accountability in the collaborative relationship.

Effective change leadership for large organizations

Mahesh Penumatsa leads Zoho's professional services practice for U.S. enterprises. In his over 15 years of experience in top-tier technology consulting organizations, he's provided business technology consultation, program management services, and digital information solutions for companies from small to Fortune 500 and across multiple industries. His expertise is in aligning IT and business strategy, defining future-state solution architectures, systems design, and technology integration.

What's at stake in change management

Rolling out a new tool or system in a large organization is a complex project that involves technology, people, and processes. Because changes in any one of these areas will spill over into the other two, change management requires a proactive, organized approach that prioritizes communication and mutual understanding.

My team has learned that for an implementation to succeed, stakeholders need to buy in and believe in the project's value, not only for the organization but also for their own role and goals. For leaders who need to articulate this value in a way that connects with each stakeholder, it's important to have the right planning tools and an understanding of how changes are implemented and sustained.

Preparing for a successful change

In the initial planning and adoption stages, successful deployments are all about securing widespread buy-in from the concrete planning stages onward. How do you get buy-in? Clear, consistent communication that prepares all stakeholders to embrace the coming change—and that requires a communication strategy.

The first step toward developing that strategy is conducting a stakeholder analysis, which helps in understanding how end users, managers, IT, and leadership relate to this particular project. There are a lot of analysis frameworks to choose from, but I like to use the RACI matrix to establish who is **responsible**, **accountable**, **consulted**, or **informed** about the project. Having that information can help with developing communication that accurately reflects each type of user's role in the change.

MAHESH PENUMATSA
Head of the US Solutions Consulting team

To understand where everyone is starting from, I use a stakeholder knowledge base chart to establish how much each stakeholder is currently aware of the project, and whether they're currently supporting or objecting to its goals. Having this information can give you the understanding and leverage to bring the value of the project home to all of the stakeholders, and change the mindset of stakeholders who aren't convinced the change should be happening. It can also build an understanding of the reasons behind stakeholders' resistance (such as concerns about technical fluency, misunderstanding of the proposed plans, or just fear of change), so that leaders can design messaging and programs to address those concerns directly.

Dealing with feedback

The work doesn't end once a new system has been rolled out. To ensure that the project achieves its desired outcomes, you need to actively find out how users and stakeholders are adjusting to the new systems or tools that impact their work. Designing and implementing adoption metrics is key to seeing whether the change has reached the people and processes it's meant to, and whether there is resistance to new tools or systems from users who are affected. The next step is collecting user feedback to understand the friction points that users are experiencing, and how the system could be modified to reduce that friction and increase the positive impact of the new system.

Once user feedback has been collected, prioritizing it becomes the biggest challenge. Different users and stakeholders are often seeking very different kinds of modifications to their new experience—some crucial, some minor, and some in conflict with other users' requests. Choosing and applying a prioritization framework makes sense of the feedback and helps in making effective decisions about which changes to implement first, which to pursue as a lower priority, and which to table because they aren't practical or impactful.

One of the frameworks I find helpful is RICE: **reach**, **impact**, **confidence**, **effort**. It scores feedback according to the number of people or transactions the requested change will reach, the amount of impact it will have on goals or metrics, the team's confidence that the change will work as expected, and the amount of effort required to implement it. The MoSCoW framework is another alternative that has the same end goal of establishing priorities, but classifies requested changes as **must-haves**, **should-haves**, **could-haves**, or **won't-haves** for the current round of implementation. Whatever framework is used, it provides a basis for deciding which requests are current priorities and will be implemented.

Sustaining change

Setting up any new system to continue successfully requires both planning for the future and meticulously documenting the present. Organizations need to assume that keystone roles like the software admin will experience turnover at some point, and create transition plans that will enable new personnel to carry forward the intentions and impacts of the changes their predecessors made.

Ultimately, successful implementations are about communication and value. The change leaders who create lasting impacts are the ones who can understand the value of a project, prioritize the goals of stakeholders from the C-suite to frontline employees, and facilitate communication that's transparent and tailored to stakeholders' needs.

Bring the value of the change home to all stakeholders

TOROMONT CIMCO | CASE STUDY

HOW TOROMONT CIMCO GAINED VISIBILITY INTO ITS SALES PROCESSES WITH CENTRALIZED REPORTING

Sales funnel automation and **centralized sales reporting** helped Toromont CIMCO grow its pipeline activity and **significantly increase** net new opportunities.

Who is Toromont CIMCO?

Toromont CIMCO delivers highly customized end-to-end refrigeration solutions for commercial and industrial sites. They manage new projects from design through to installation and provide on-going post-installation servicing and maintenance to keep their solutions running smoothly long term. CIMCO Refrigeration was founded in 1913, becoming a division of Toromont in 1969. Today, CIMCO is the largest refrigeration contractor in North America, with 1,200 employees across 30 offices in Canada and the USA, and is particularly focused on sustainability, acting as a leading advocate for eco-consciousness in the industry. Due to the extremely customized nature of the solutions CIMCO offers, their sales reps must have high levels of technical knowledge as well as excellent customer service skills. Because so much of their revenue comes from recurring maintenance and servicing work, the quality of their long-term relationships is key to their success.

What problem led CIMCO to choose Zoho?

With each branch operating its own distinct processes and without clear, centralized reporting on core sales metrics, silos had developed between regional sales offices. The lack of concrete visibility made it hard to forecast hiring needs and even harder to onboard new team members. This resulted in a fragmented data picture that was significantly limiting revenue growth. David Fauser, the newly promoted Director of Sales, was determined to address these inefficiencies.

CIMCO needed a solution to centralize data and standardize processes across the sales org. It needed the customizability to capture all the information required for complex and highly technical deals, and enough flexibility to accommodate distinct sales pipelines for installation projects, updates, and multiple types of servicing.

Robust reporting functionality and KPI tracking was also essential to enable process improvements, employee evaluations and coaching, and data-driven strategy development, both at the regional and national level. As with any digital transformation, the solution needed to offer a great end-user experience to achieve broad adoption and overcome resistance from longstanding employees.

> *Zoho has played such a key part in our organization's growth journey, we see them as part of our team.*
>
> \-
>
> **David Fauser**
>
> Director of Sales
> Toromont CIMCO

What solution did Zoho provide?

After choosing Zoho CRM, Fauser's team focused on using built-in CRM features to guide employees through each step of their new workflows and processes. This paid off, resulting in an impressive 100% adoption rate. These automations, alongside CRM's tight integrations with CIMCO's other internal tools, reduced manual workloads and increased employee efficiency, leading to a 30% increase in pipeline activity.

To get buy-in from sales teams, Fauser needed to demonstrate how new automations and workflows reduce the need for cumbersome data entry processes and ensure greater consistency across regions. CRM modules were preconfigured with CIMCO's sales processes, while centralized sales data was fed into fine-grained reporting to track sales patterns and create sales comparisons across regions and personnel.

Once sales leaders had meaningful visibility into the sales pipeline, they could finally leverage analytics to inform strategic decision-making. Custom reporting revealed valuable targets for process optimization and expanded employee training. And because managers are no longer guesstimating key growth metrics, they're able to focus their time on coaching employees and innovating on their CX.

What benefits did CIMCO experience?

Since deploying Zoho CRM, Toromont has seen a 20% growth in sales, a 30% increase in pipeline activities, and a 66% increase in opportunities in the business segment focused on net new projects. By moving to an automatic funnel, Fauser's teams uncovered millions of dollars in viable deals that had stalled out. More importantly, they've been able to implement new processes in CRM to ensure that future opportunities can't fall through the cracks.

The efficiency gains enabled by automation left sales reps with more time for relationship-building activities, leading to a better customer experience. Customers have benefited from more consistency across territories and better, more data-informed solution recommendations.

Adopting Zoho CRM has benefited CIMCO far beyond the initial goals of providing alignment and visibility to sales processes. It has improved employee retention and the sales culture as a whole. Management has started actively leveraging sales data to provide clearer, more actionable guidance on KPIs, which has helped improve morale. Best of all, it has led to a workplace that meaningfully recognizes and celebrates employee success. As Fauser notes, it's been "incredibly rewarding to see our team members empowered by what Zoho brings."

FEATURED INTEGRATIONS

Maximize the value of every customer touchpoint with these featured integrations

Provide customers with a seamless communication experience at every step of their journey. These native integrations create a smooth, connected workflow from the customer's first visit all the way through contract signing and project execution.

Zoho CRM + SalesIQ

Zoho CRM + Zoho SalesIQ

Track your web traffic, understand your visitors, and quickly initiate personalized engagements with contextually informed chatbots and live chat.

Help teams deliver a more personalized and comprehensive visitor journey by integrating CRM data and functionality into the SalesIQ chat interface. As agents engage with active website visitors from SalesIQ's chat pane, they can view, add, and access CRM prospect data from inside their chat window. These operators can also assign visitors as leads or contacts for sales follow-ups, or trigger other automated follow-up activities to appear in Zoho CRM's Tasks tab.

SalesIQ automatically pushes visitor data to CRM and alerts sales teams with details about where a prospect is looking, charts their path so far, and assigns them a visitor score. This helps sales teams route the visitor to the agent best equipped to offer them help, and equip that agent to jump into a live chat with the information needed to make a good connection.

Custom workflows in SalesIQ let teams automate the actions that turn visitors into customers. Trigger banners to display based on previous browsing behavior, send email reminders about abandoned carts, or open a chatbot after a specific threshold of website interaction. By training SalesIQ chatbots to field FAQs or collect prospect data, businesses can deliver 24/7 support without round-the-clock staffing.

Zoho CRM + Zoho Projects

Zoho CRM + Zoho Projects

Align internal and external stakeholders with a centralized project management solution that keeps teams collaborating and clients informed.

Drive better collaboration, faster problem-solving, and greater transparency with the integration between Zoho CRM and Zoho Projects. Speed up response times with trigger-based workflows that automatically create new projects and map them to client accounts as soon as the contract is signed. Monitor the progress of every project with detailed feeds under the Projects tab in Zoho CRM. And report bugs, assign tasks, and establish project milestones without leaving the familiar Zoho CRM interface.

This bi-directional integration bridges sales and production data by importing CRM sales data contextually into Zoho Projects. By associating CRM data with individual projects in Zoho Projects, sales reps can see progress details, lifetime and one-time project revenue, and fine-grained analytics and reporting.

This integration also simplifies collaboration by centralizing communication with the Client Portal. By pairing status updates with meeting notes, emails, and demo information, this integration empowers both internal and external stakeholders to see the entire project lifecycle.

Zoho CRM + Zoho Contracts

Zoho CRM + Zoho Contracts

Create, populate, and deliver contracts from inside Zoho CRM for better status visibility and more accurate follow-up.

Contract execution is the worst place to introduce friction and delay. Improve data accuracy, speed up delivery times, and shorten the contract life cycle with the Zoho Contracts integration with Zoho CRM.

With this integration, sales agents can initiate new contract requests directly from a deal or potential record in Zoho CRM. Those contracts are automatically distributed based on predefined assignment rules, and made available in the Attachments tab in CRM. Agents can turn contract action items into CRM tasks and reminders, ensuring that deals aren't lost at the signing stage because of a missed call or notification. Automating contract handoffs between teams like sales and legal helps ensure that deals don't die as a result of poor internal collaboration.

The creation wizard in Zoho Contracts helps users build contracts in a few steps. Agents can also select from a set of customizable templates that auto-populate with data from related fields in Zoho CRM, reducing the need for manual entry and the scope for errors. Built-in analytics and reporting gives teams insights into client-side engagement with the contract to help agents deliver more contextualized and personalized follow-up communications.

INDUSTRY IN-DEPTH

Overcoming the ERP blind spot

Why CRMs are bridging gaps for manufacturing sales teams

JULIE DORIS, REGIONAL ACCOUNTS DIRECTOR

Over nearly two decades in the manufacturing industry, Julie Doris played a key role in advancing sales operations, focusing on revenue growth, process efficiency, and organizational transformation. In her current role as Regional Accounts Director at Zoho, she specializes in guiding customers through their journey to success. Committed to delivering exceptional results, she is passionate about empowering businesses to optimize their operations and achieve their strategic goals through innovative technical solutions.

Digital transformation has been a game-changer across the manufacturing industry—but what happens when some teams get left behind? Huge increases in the adoption of SaaS ERP software have helped the manufacturing sector remain innovative and adaptive during fluctuating market conditions. Unfortunately, the sales teams in these organizations often end up caught between reliable old methods and new tools that haven't been designed for their needs. Fortunately, by deploying a right-fit adjunct CRM, these stranded teams can get out of the ERP blind spot, boosting their performance while reconnecting their siloed data with the rest of the organization.

Unique challenges facing manufacturers

Large economies of scale and custom order production can create difficult work for manufacturing sales teams. While implementing minimum order requirements (MOQ or MOV) can help these manufacturing sales teams prioritize deals based on production costs, these leads often require more due diligence to evaluate compared to traditional sales models. Long manufacturing engagement cycles are compounded even further when dealing with complex custom orders, which often require lengthier configure, price, and quote (CPQ) processes on top of lead qualification.

Even when engaging with eager customers, closing a deal can still be a time-intensive ordeal for manufacturing sales reps. CPQ processes in manufacturing often require approvals from a variety of stakeholders—including members of technical teams for production feasibility and timelines and finance teams to confirm pricing and discount structures. When inventory, logistics, and materials are all in flux, fine-tuned workflows and unified data become crucial to maintaining momentum on important deals.

Unfortunately, there are still significant technical and organizational hurdles to ensuring this level of efficiency within manufacturing sales teams. These teams often rely on manual or outdated data entry methods, with spreadsheets or on-premise legacy software becoming load-bearing systems that become more and more difficult to break out of over time. While these older systems have the advantages of simplicity and straightforward training requirements, the drawbacks are increasingly felt as these organizations grow and scale. Solutions that were adequate when operating out of a single office or production facility quickly lose their overall effectiveness once the organization expands their operations to new sites. Without the ability to efficiently collate insights and coordinate activities across multi-site operations, these siloed sales systems can act as bottlenecks for revenue and growth.

The ERP blind spot

Enterprise resource planning (ERP) systems are often central to manufacturers' digital transformation efforts. Their ability to singularly de-silo multiple key departments and teams by unifying and coordinating their back-office operations make them a very attractive and sensible solution for manufacturers at all levels of complexity. As such, ERP software has seen significant success within manufacturing and other industrial sectors. In recent years, ERP developers have sought to build on this success by expanding the scope of their ERP solutions beyond back-office operations, attempting to offer more of an all-in-one solution to their customers. However, the sales pipeline functionality included within modern ERP systems tends to be outclassed and under-cooked when compared to the depth of mainline ERP features and the frequency of their updates.

ERP sales modules are often launched with overly rigid customization options and rudimentary feature sets, which ends up applying an simplistic, one-size-fits-all approach to an industry with a high level of complexity and variability, even from one firm to another. And with a limited ability to tailor KPIs and analytics to align with manufacturers' unique business lines (pharmaceuticals vs television parts, for instance), sales teams often struggle with adoption. In many cases, these teams simply opt out of the ERP system in favor of more convenient analog processes, making those unsanctioned and untrackable processes all the more difficult to displace and modernize.

Another issue among ERP-enabled sales teams is a lack of centralized sales data. Given their primary focus on back-office functionality, ERP developers rarely establish integrations between their products and common supplementary sales tools. Sales teams end up struggling to connect important data from their lead generation or contact engagement software to the ERP module responsible for managing their deal pipelines. This front-office integration shortfall results in an unbalanced flow of data throughout the organization. Where most common ERP solutions typically have robust interoperability for back-office functionality like inventory management, supply chain management, or human resources, sales data remains disconnected within silos.

The adjunct CRM solution

Manufacturing sales teams caught in the awkward position between inefficient legacy processes and under-powered ERP sales functionality may be able to find an effective solution by deploying an adjunct CRM. Most modern CRM solutions vastly outstrip legacy tools and ERP sales functionality in both feature depth and integrations. For example, the ability to automate complex processes like quote approvals or call cadences in a modern CRM enables manufacturing sales teams to eliminate hours of inefficient labor and provide a more impactful customer experience. An adjunct CRM, therefore, is able to act as a complementary platform that both enhances sales capabilities and bridges gaps in ERP functionality.

It's hardly surprising that modern CRM systems offer a significant efficiency boost to customer engagement over manual data entry, legacy software, and ERP. However, they can also serve as the missing piece to the ERP integration puzzle. Although ERPs have sparse integration offerings for supplementary sales tools, they are typically able to integrate with most modern CRMs. And since CRMs naturally have substantial interoperability with these other sales tools, they're able to act as a bridge between the organization's ERP and valuable sales data. With information flowing back and forth in both directions, sales leadership can use their ERP-adjunct CRM as a centralized data warehouse, allowing them to perform advanced reporting, identify hidden bottlenecks in their pipelines, and forecast future performance with a high degree of confidence. Crucially, important data from other sales tools stored within CRM records can be readily introduced into the ERP data ecosystem, feeding value back into the organization.

Transforming sales operations

As manufacturers navigate the complexities of the modern B2B market, ERP-adjunct CRMs are emerging as a practical solution to intractable problems. By connecting fragmented data and streamlining revenue generation, these tools allow sales teams to focus more on building stronger customer relationships that drive growth and spend less time on navigating organizational inefficiencies. Few teams are as closely connected to revenue as sales, so these enhancements not only provide a massive efficiency boost to their own intra-departmental teams, but a stronger foundation for the entire organization.

FAST FACTS
on CRM adoption among manufacturers

INDUSTRY BASICS

US makes up **50%** *of global ERP market* **(\$26B** *of* **\$53B** *worldwide)*

Source: Statista Market Insights

Manufacturing is **24%** *of* **US GDP**

Source: US Dept. of Commerce

43.5% *of all US manufacturing workers are employed by enterprises with 250+ employees*

Source: US Bureau of Labor Statistics

Sales & support together make up **~5%** *of manufacturing employees overall.*

Source: US Bureau of Labor Statistics

2:1 *ratio of* **Sales** *to* **Support**

Source: US Bureau of Labor Statistics

Sales teams are essential to manufacturers' success but a small percentage of overall staffing.

TECH STACK CHALLENGES

35% of sales leaders *use manual processes for forecasting*

Source: RevOps

70% of manufacturers *collect data manually*

70%

Source: Manufacturing Leadership Council

9 out of 10 spreadsheets *contain avoidable errors*

Source: Forbes

45% of manufacturers *who feel* **unprepared** *for the future handle the majority of their sales & operations in the ERP*

45%

Source: Intelligent CIO

77 %

77% of manufacturers *who feel* **future-ready** *handle the majority of their sales & operations in the Cloud*

Source: Intelligent CIO

> 80% of manufacturers *feel legacy tools & dispersed data are moderate or serious challenges*

Source: Intelligent CIO

Facing challenge | Not facing challenge

ERP software is built to address the challenges of manufacturing, not sales, and advancements in industry-standard software are slow.

SOFTWARE UPGRADES

70%

~70% of organizations *plan to increase CRM spend in the next year*

Source: Forrester

Manufacturing software expenditures **increased > 20%** *in 3 years.*

Source: US Department of Commerce

20%

To remain competitive, manufacturers are increasing their software spend, especially adding a fully functional CRM as an adjunct solution to their ERP.

SPECIAL FEATURE

Strategies for **maximizing the value** of CX automation

Through a combination of flexible customer experience automation software and comprehensive analytics, businesses can increase ROI in automation while achieving stronger and more loyal customer relationships.

Hardeep Chawla, Director of Enterprise Sales at Zoho, is a seasoned SaaS sales leader with over a decade of experience driving growth and building high-performing teams. Known for his strategic vision and consultative approach, he excels in guiding enterprises through complex buying journeys and digital transformations while fostering long-term customer relationships.

From delivering more consistent customer journeys to offering deeper personalization across touchpoints, automation can help businesses meet a range of big-picture CX goals. By implementing customer experience automation strategically and alongside advanced technologies (such as AI and ML), many businesses have achieved stronger customer relationships, improved customer loyalty, and increased CLVs.

But while most decision-makers have incorporated some level of automation into their customer journeys, many large companies are struggling to realize the analytical benefits and cost savings they hoped to achieve. It's clear that successfully leveraging automation for CX requires more than an investment in relevant software. It requires proactive, data-driven strategies that align process automations with overarching CX initiatives. In developing such strategies, businesses can avoid common automation setbacks that lead to budget overruns and customer dissatisfaction, among other consequences.

Identifying high-impact opportunities for automation

In most organizations, opportunities for automation are abundant—but automating for the sake of automating rarely benefits a company's bottom line. More frequently, it leads to generic customer interactions, increased technological complexity, and escalating expenses.

A more impactful approach to automation typically begins with an analysis of the company's critical CX goals and the processes that are most integral to their success. Examining the data, business leaders should be able to identify which relevant processes are a source of frequent errors and inefficiencies and use them as a jumping-off point for the adoption of CX automation. For example, a business that aims to improve lead conversion and notices a significant drop-off in follow-up communications after the first sales call may choose to configure automated call reminders for its agents. Alternatively, it could trigger an entire automated outreach sequence after agents have made initial contact.

In addition to helping optimize pivotal CX processes, a selective approach to automation affords businesses tighter control over their customer journeys, making it easier to balance technology-driven tasks with human intervention. This is crucial for delivering top-tier CX, as many customers still prefer interacting with live agents for support, among other touchpoints along their journeys.

> ***Successfully leveraging automation for CX requires more than an investment in relevant software. It requires proactive, data-driven strategies that align process automations with overarching CX initiatives.***

Evolving automated offerings to meet customer expectations

Customer expectations are influenced by a variety of factors, from demographics to market conditions. To optimize the customer experience, businesses must be tuned in to the evolving needs of their audiences—and prepared to pivot to new strategies in response. This can be a complicated undertaking for adopters of CX automation, especially if they haven't prioritized the flexibility of their software solutions.

Solutions that offer a streamlined process for modifying automated workflows make it easy for stakeholders to craft timely and relevant customer touchpoints. A sales agent, for instance, could increase engagement by moving automated welcome messages to a platform where leads have become more active. A support team could improve customer satisfaction by configuring a chatbot to account for a new product upgrade.

Knowing when and how to adjust automations for the greatest possible impact typically requires access to comprehensive data and analytics. A centralized platform that pulls data from across departments (like Zoho Analytics) can help users identify key trends in customer behavior and preferences. As a result, stakeholders are better equipped to keep company offerings dynamic—even when they're primarily driven by automation. This is essential for bringing deeper levels of personalization to every interaction, which, in turn, leads to stronger and more loyal customer relationships.

Vetting software to maximize value

A number of factors can contribute to automation budget overrun. For example, if a business adopts automation tools that are difficult to integrate across its tech stack, it may be forced to purchase additional software solutions or add-ons. If the automation tools aren't user-friendly and intuitive, team leaders may need to invest in training programs to help stakeholders leverage solutions effectively. And if robust security protocols are not introduced alongside automation, organizations risk violating consumer privacy laws (such as GDPR and CCPA), which can result in significant financial penalties.

Fortunately, many expenses can be mitigated through a comprehensive and data-driven software vetting process. When decision-makers opt for tools that are both scalable and flexible, like the apps offered within the Zoho ecosystem, they can eliminate the need to acquire new solutions as automation initiatives expand. Further, tools that are equipped with low-code functionality empower stakeholders to customize automations without additional training (or additional IT staffing).

By leveraging internal data and reports, business leaders can determine which software features and capabilities will drive the most value for their company. This helps to streamline the vetting process, and reveals which solutions can deliver the highest ROI. In this way, data promotes more effective implementations that—instead of draining company resources—could result in significant annual cost savings.

Staying focused on the big picture

In the coming years, the popularity of automation is expected to continue growing. The potential use cases for CX automation will likely expand—but this will only make it more crucial for businesses to stay focused on their data, and be precise in their efforts to identify ways automation can actually improve the customer experience. This selective, data-driven approach to CX automation will be a key differentiator between businesses that see their CX initiatives stagnate and those that use automation to secure stronger customer relationships and long-term business health.

*This article originally appeared on **Zoho's Enterprise Insights** blog, where we explore emerging business trends, best practices, and strategic approaches to digital transformation. To find more content like this—plus ebooks, webinars, interviews with industry insiders, case studies, and more—check out our full archive of thought leadership content.*

CAMERON COVERT, Head of the US Customer Events Team

Interview

US User Events

Zoholics, Zoho's annual user event, connects users, employees, and partners for two days of product training, best practices, and hands-on support. Attendees get unparalleled access to Zoho experts, sneak peeks into product roadmaps, and the chance to hear directly from Zoho's leadership about the organization's values and strategic vision. We asked Cameron Covert, Head of US Customer Events, to tell us why customers love Zoholics, and what attendees can expect in 2025.

Q: Tell us a bit about Zoholics. What is the goal of the event, and what should attendees expect? How does Zoho put its unique spin on something like a user conference?

Cameron: Big picture, Zoholics is about helping users learn new ways to maximize the value of their Zoho ecosystem. It offers attendees the chance to get up close and personal with our products, employees, and leaders. We also have demos of our newest solutions and a ton of in-person product trainings. We really aim to offer a range of programming to help users at every level of technical fluency.

This year, Zoholics is headed to Houston's GRB Convention Center from May 13th to 15th. This is the first time we've hosted Zoholics outside of Austin in almost a decade, and we're excited to bring Houston's unique flavors to the event. And while it might be hard to top the food trucks and live music of 2024, my team is building a lot of exciting new experiences.

Part of our unique spin has to do with what's unique about our company itself. Zoho has always taken the approach of a "flat" corporate hierarchy, where every employee is more in service to the customer than to a VP or CEO. Zoholics puts this structure on display. I can honestly say it is the only large-scale event I've seen where every single employee, from the top down, is ready and available to help attendees find the right solution for their business.

Q: That's unusual; most software user conferences aren't staffed soley by the organization putting it on. That seems like it would make the event a lot more expensive. So why do you do it all in-house? What does Zoho get out of Zoholics?

Cameron: Zoholics is one of the best ways for us to learn from users. Obviously, users come to learn from us, and we regularly hear about the value users get from the programming and from meeting our partners, product managers, developers, and integration vendors. It's important to us to facilitate those conversations and connections.

But those interactions also spark ideas for us, help us see how different organizations are solving problems using Zoho products, and inspire us to create new solutions. Our product teams use Zoholics as an opportunity to preview new products and officially release new features in our existing products, so it's an opportunity for them to share their enthusiasm about the things they've been working so hard on.

It's also a chance for connection for our employees. Because we are a global company, a lot of our work happens through digital channels. Getting to interact face-to-face with so many colleagues and customers is exciting for us, so it's never a surprise when attendees mention how enthusiastic and helpful they find Zoho employees.

Q: More than 25% of Zoholics attendees are actually repeat visitors. Why do so many users return, year after year? And for the first-time attendees, is there a "must do" that you'd recommend?

Cameron: We do have a lot of repeat attendees, and they say they love the chance to immerse themselves in all things Zoho. It gives them front-row access to Zoho's company culture, employees, and the philosophies that underpin everything we do. And they really appreciate the availability of our executive leadership and their willingness to engage with users in unscripted settings like fireside chats and AMAs.

I'd say that a must-do is the 1:1 meetings with the Zoho support team. They're really valuable sessions included in the ticket price that let customers get hands-on, person-to-person advice for managing their specific processes and implementations. Many users describe these sessions in particular as "game changers." And for us, these conversations are a huge way that our teams get inspired with ideas on how to better serve our customers.

Q: You've mentioned ways for users to get to know Zoho as a big picture. Is that mostly what this event is about? Is there value in it for people who are coming with one specific business angle they want to dive into?

Cameron: The goal of Zoholics is to offer training for every product and every type of user. We deliver hundreds of hours of content over two days and a dozen tracks, ranging from vision and strategy to structured, classroom-style training on core skills in Zoho products. Teams that are just starting their Zoho journey can come for implementation advice and pro tips, while long-time users can take in-depth training sessions that help them dial in advanced product functions, integrations, and best practices.

Q: Are there any inside secrets or advice you can share? Or specific highlights that attendees should have on their radar?

Cameron: Attendees should definitely check out the Expo Hall, which is a more self-directed way for them to connect with Zoho. In 2024, we had dozens of stations representing our products and platforms. These stations give customers the chance to meet teams representing over 50 different products, plus some of the many third-party vendors and integrators that "build with Zoho."

We offer a pretty wide range of experiences in the Expo Hall, and there's always something new. My favorite from 2024 was the visit from the 10-ft Texas longhorn, closely followed by the mechanical bull. We also created a custom experience for our managed accounts in 2024, with a dedicated lounge area with snacks and Zoho swag, as well as meeting rooms for one-on-one white-boarding sessions with their account managers.

Tap into Zoho's full software ecosystem to get more value from your existing solutions

PIPELINE AND SALES MANAGEMENT

Deliver exceptional customer experiences across every touchpoint with interconnected workflows and centralized data processes. Give teams actionable insights for optimizing customer outreach, predicting business trends, and maximizing the LTV of every customer.

Zoho CRM	Improve sales performance with fine-grained funnel analysis, robust automations, and a unified platform.
Zoho SalesIQ	Convert website visitors into paying customers with an integrated live chat solution.
Zoho Sign	Send documents, collect digital signatures, and track progress across the entire signing process.
Zoho Bookings	Automate scheduling, customize follow-up notifications, and reduce no-shows.

Interested in the full pipeline and sales management suite? Check out...

Zoho CRM Plus | The customer experience command center

MARKETING AND CUSTOMER ENGAGEMENT

Maximize the ROI of marketing spend with multichannel marketing journeys optimized for every device. Empower teams to act decisively with a comprehensive solution for designing, monitoring, and automating campaigns.

Zoho Campaigns	Nurture your leads with drag-and-drop email campaigns and track success with fine-grained analytics.
Zoho Survey	Get a better understanding of your customers for more effective engagement.
Zoho Backstage	Plan events from end to end with ticketing, marketing tools, and audience engagement.
Zoho DataPrep	Expand your audience with live events, pre-recorded sessions, and interactive engagement features.

Interested in the full marketing and customer engagement suite? Check out...

Zoho Marketing Plus | A unified audience engagement platform

| ZOHO PRODUCT CATALOG |

With 55+ products and more in development all the time, Zoho offers customizable software to tackle every business problem. From standalone apps to product suites and platforms, Zoho has solutions for every business.

CUSTOMER SUCCESS

Give support reps access to comprehensive customer history so they can start every conversation on the most productive footing. Guide users through step-by-step solutions with AI-powered chatbots and AR features for faster resolutions.

Zoho Desk	Deliver contextual customer support across multiple channels from a single interface.
Zoho Assist	Remotely troubleshoot customer software issues and resolve support requests more quickly.
Zoho Lens	Give real-time help to customers and field service teams with AR-based assistance.
Zoho Publish	Manage feedback, monitor reviews, and improve feedback response processes.

Interested in the full customer success suite? Check out...

Zoho Service Plus | An integrated suite for fostering customer success

ACCOUNTING AND BACK OFFICE SOLUTIONS

Reduce the risks of revenue leakage with end-to-end accounting management. Streamline and automate invoicing, inventory management, and shipping. Improve expense compliance with receipt scanning and automated reporting, and use preset purchase approvals to streamline corporate travel expensing and keep teams within budget.

Zoho Books	Handle every aspect of accounting, financial reporting, and tax compliance for your business.
Zoho Expense	Simplify employee expensing with mobile receipt capture, OCR, and one-click reporting.
Zoho Inventory	Manage purchasing, inventory tracking, warehousing, and drop-shipping across multiple sales channels.
Zoho Invoice	Build customized invoices that align with your brand, and automate bill delivery based on project status.

Interested in the full accounting and back-office suite? Check out...

Zoho Finance Plus | A streamlined solution for back-office operations

PRODUCTIVITY AND COLLABORATION

Bring your business communication into the Zoho ecosystem and prevent data from being siloed in disconnected messaging and project management tools. These fully integrated apps keep conversations moving across every channel.

Zoho Mail	Scale your email system with advanced encryption, message recovery, and fine-grained security policies.
Zoho Projects	Plan, track, and collaborate on projects while capturing detailed "time on task" data.
Zoho WorkDrive	Simplify access management by storing, organizing, and managing team files in a single location.
Zoho Cliq	Drive open, cross-departmental conversation while keeping your corporate communication secure.

Interested in the full productivity and collaboration suite? Check out...

Zoho Workplace | **The gateway to productive teams and seamless collaboration**

TALENT MANAGEMENT

A holistic solution for managing the employee lifecycle from candidate screening and onboarding to performance reviews and exit interviews. Reduce manual data processes with self-service employee portals, custom workflows, and automations.

Zoho Recruit	Post ads, source candidates, and automate a comprehensive candidate experience.
Zoho People	Deliver a smoother and more positive employee experience from training to offboarding.
Zoho Vault	Manage team and personal passwords to safeguard your business accounts from cyber attacks and insider threats.
Zoho Learn	Build your internal KBs and employee training programs with an integrated content management platform.

Interested in the full talent management suite? Check out...

Zoho People Plus | **Integrated HR for seamless employee experiences**

ZOHO PRODUCT CATALOG

IT AND SYSTEM MANAGEMENT

Build, manage, and refine custom low-code business apps. Give central IT teams real-time monitoring and performance metrics for servers, networks, websites, and applications, and empower them to optimize the productivity of your distributed workforce.

Zoho Creator	Design, build, and deploy custom low-code applications for your organization's unique business needs.
Zoho OneAuth	Replace passwords with secure, cloud-based single sign-on.
ManageEngine MDM	Ensure devices remain secure and compliant with Mobile Device Management.
Zoho Directory	Manage identity authentication and user access for connected apps.

Interested in the full IT and system management suite? Check out...

Zoho IT Management | **Simple and secure IT management from the cloud**

Take your business intelligence to the next level

Go beyond the native reporting available inside your key business systems with Zoho Analytics. Combine data from across the Zoho ecosystem to create powerful, multi-product, multi-departmental insights.

Zoho One: The Operating System for Business

Bring all of your people and processes together with Zoho's full suite of tightly integrated applications, all with a single subscription.

According to the analysts

Through a combination of user interviews and on-the-ground research, trusted analysts have put Zoho's solutions to the test and identified tangible impacts on the business world. Check out some of their key findings below:

FEATURED REPORT: THE CASE FOR DEMOCRATIZING CRM

How does democratizing data affect the customer experience? **Forrester Consulting** examines how upmarket organizations can improve their coordination and become more customer-centric by broadening CRM access and customization across their customer operations.

77% of non-sales departments in the customer journey use CRM, but only 4% have full access to optimize it for their specific use cases.

Zoho CRM

Zoho CRM delivers on customization, scalability, and analytics

There's a reason users in service-focused industries gravitate toward Zoho CRM. In this report, **Nucleus Research** highlights a range of benefits service industry users have experienced, including an 18% increase in client onboarding efficiency.

Zoho Analytics

Analytics 6.0 is ready for advanced BI challenges

Following the release of Analytics 6.0, **Technology Evaluation Centers** praises Zoho Analytics for making advanced analytics tools and powerful AI features accessible to a broad range of users, regardless of technical ability.

Zoho Analytics

Zoho Analytics is user-friendly and future-ready

In this review, **aheadCRM** identifies advanced features—like decision analytics and AI-driven auto-analysis—that give Zoho's BI platform an edge in the enterprise space while delivering immediate value to its users.

ZOHO

Zoho's Global Headquarters in Chennai, India

Thank you for choosing Zoho as your technology partner.
For nearly three decades, we've helped power millions of businesses to success by delivering scalable and flexible software solutions.
Our relentless commitment to our customers has helped us grow from a single-product company into an organization with an ecosystem of 55+ applications, 1,500+ marketplace extensions, and 100 million users around the world.

Zoholics 2025

Join us in Houston, Texas
May 13-15 for Zoho's
newly expanded user conference

Zoholics—Zoho's annual user conference—brings together customers, product experts, implementation partners, and vendors for 3 days of networking and educational programming. With content ranging from technical to tactical, it's a chance for all types of users to build their knowledge of Zoho, the Zoho business ecosystem, and the latest trends in business technology.

- **Over 100** presentations and workshops
- **Expo and experience center** with Zoho partners and vendors
- **Access** to Zoho leaders, product experts, and key technical staff
- **1:1 sessions** with a member of the Zoho support team
- **Panel discussions** with CIOs, analysts, and Zoho Partners

Expanded pre-event workshops
To meet the demand for classroom-style learning, we're expanding our pre-event workshops on day 1 and 2 of the event. These in-depth workshops can be an incredible resource for organizations looking to expand their Zoho implementation.

NOTE: Workshops require preregistration and an add-on to the general admission ticket.

This year's workshop tracks will cover:

- Customer experience essentials
- Marketing essentials
- Customer service essentials
- Zoho Books masterclass
- Deluge for beginners
- Analytics essentials
- Project management essentials
- Zoho administration essentials

Join us!