

ISSUE # 2 BI EDITION

ZOHO BUSINESS PULSE

Democratizing data with integrated analytics

Elevate the quality of your insights and push data-driven improvement to every corner of your organization

FEATURE:

The democratization of advanced analytics and the end of dark data

ASK AN ACCOUNT MANAGER:

Why haven't more organizations made the leap to an analytics solution?

CASE STUDY:

How Renu Energy cut project time by 50%

About **Business** Pulse

oho 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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Message from **Ricky Thakrar**

Head of Zoho Account Management

ver the last decade, tech companies and venture capitalists have tried to insist that innovation is synonymous with disruption. That true innovation requires a big bang; something that changes everything about how a company does business, sees itself, or provides value to the customer.

But anyone who has been in business knows that market-creating innovation is not a synonym for "big bang" disruptions. Creativity that requires lightning to strike isn't predictable, and it's hardly sustainable. That's why great organizations find paths toward a more reliable, "non-disruptive" approach to fostering creativity and innovation. This means strategies focused on refining existing solutions, or solving problems that others have taken for granted.

And where do these companies look for these generative innovations? They look to their data.

That's because an organization's next great idea can usually be found by digging into the data they already have in their systems. But this form of "non-disruptive creation" requires KPIs that aren't directly related to P&L. In order to build processes that foster innovation, the first step is identifying the conditions (environmental, managerial, etc) that foster it.

Innovation isn't just about creating a "new to the world" service or product. It's about consistently finding ways to drive ROI without needing a massive recapitalization strategy or completely reinventing your entire business model. Non-disruptive innovations are built by leaning into core competencies, finding ways to better serve existing customers, and investing in the people and processes that foster larger strategic goals.

Sustainable innovation isn't a pipe dream, it's a well-planned process. We know that because that's how Zoho has stayed in business for nearly 30 vs. We haven't focused on big, splashy disruptions; we've focused on year-over-year improvement both in the products we sell and the value we drive for customers. This has required us to understand what users want and how they engage with our digital ecosystem.

Gaining that level of understanding requires analytics systems that offer real-time visibility, cross-functional insights, and the intelligence to surface the data you didn't know you should be looking for. That means a unified, useable BI platform capable of supporting the many sources, processes, and insights that comprise an organization's data story.



Schedule a call with an Account Manager

ASK AN ACCOUNT MANAGER

Why haven't more organizations made the leap to an analytics solution?

* * *

Zoho's Account Management team helps organizations across industries grow the value of their Zoho implementations. They regularly work with larger customers to strategize ways to tackle their business challenges by using the Zoho Suite. We asked members of the team to talk about the reasons companies aren't using a BI tool like Zoho Analytics.



Julie Doris Account Manager

66 They just don't know what they're missing

I'm a big believer that analytics can solve most any business problem. Data is always the easiest place to turn when looking for ways to innovate on existing products or services. No matter what teams are currently doing with their data, there are always ways to do more.

I've found the biggest reason organizations are reluctant to implement a BI solution like Zoho Analytics is because they don't know what they're missing. This is easily solved by educating stakeholders or leadership in order to grow awareness. And when teams are finally running on clean, consistent data, the difference in outcomes is like night and day.



Jonathan Hantsbarger Account Manager

66 A fear of complexity that doesn't actually exist

Zoho Analytics is a powerful solution, but that doesn't mean it's hard to use. That perceived complexity can frighten people away from solutions that are total game changers. But the reality is that Zoho Analytics is a really user-friendly application, and not just as compared to the cluttered interfaces found in other BI tools.

People want data, but they don't want to feel intimidated by it. Because Zia (Zoho's Intelligent Assistant) uses natural language processing, employees can build reports without being fluent in computer science. When they need actionable, data-driven insights, they can Ask Zia and get analytics they can understand.

66 Resistance to change

The most common reason digital transformations fail is resistance to change. And while some measure of fear in the face of change is natural, the "survival instinct" driving hesitation can also be exactly what prevents organizations from scaling solutions and growing revenue. Is that survival instinct a good enough reason to forego the cross-organizational benefits offered by a unified BI platform like Zoho Analytics?

When organizations deploy a comprehensive BI solution, it ensures that everyone in the company uses common terminology and common measures. This reduces a lot of the friction that creates confusion and hinders collaboration. When dashboards are built well, there is no opportunity to misinterpret data. It keeps everyone in the business in the loop and focused on the right KPIs.

66 Concerns about breaches and regulatory compliance

Fear of data breaches or concerns about regulatory compliance are common reasons I hear for why an organization has yet to adopt a robust analytics solution. Of course, risk mitigation is imperative, but the flip side is that it can create a kind of complacency and resistance to change that hamstrings companies down the line.

But Zoho provides GDPR-level privacy and data security by default for every customer, not just where government regulations require it. That means it can be a powerful partner in your regulatory compliance strategy. And the fine-grained access permissions and auditing features make Zoho Analytics a solution that offers exponentially more security and control than spreadsheets.



Jen Loney Account Manager



Scott McPhail Account Manager

FROM THE SOURCE

OP-ED: The **democratization** of advanced analytics and the end of dark data



Sailas Sundaram Senior Product Manager,



FROM THE SOURCE gives readers a chance to hear from the people behind the products. Each installment will connect with a different business leader at Zoho, asking them what they see for the future of their industry.

Sailas Sundaram is the Senior Product Manager at Zoho Analytics. During his decade-long journey with Zoho, Sailas has overseen product management, taking solutions from concept to launch. As an expert in aligning advanced technologies with key business objectives, he also oversees the BI Technology & Consulting Partners Network and Professional Services program.

f the information economy has taught us anything, it's that data is valuable. Search engines and social media companies have earned trillions of dollars off the data they collect, the analyses they perform, and the access they sell. After all, what is digital marketing if not the strategic leveraging of data at scale?

Beyond the household names of the information economy, there are also thousands of brokers whose entire business model is built on profiting from the transfer of data. They help

data flow from the "mines" where it is collected to the strategists who can refine it into insights that fuel business decision-making: which customers to target, what they want to buy, how to influence them, where to invest, or what's coming next.

If so much money has been made off data, why aren't companies treating the data they already have as the valuable asset that it is?

Historically, the most powerful insights were only available to the largest companies with the deepest pockets. With enough money, entrenched industry incumbents could purchase a competitive edge-large teams of data scientists, running expensive software on top of massive data lakes—which newer or smaller players couldn't hope to match. Growing organizations could extract some amount of value from their data, but truly transformative insights were too time-consuming, labor intensive, or technically challenging to generate at scale, let alone sustain for the long term.

That era is coming to an end.

In the coming years, we at Zoho Analytics are confident that the pace of adoption for advanced business intelligence will only increase as data storage costs drop and AI technology improves. With the rise of affordable, scalable, AI-enabled business intelligence platforms—like Zoho Analytics—more and more companies will be able to leverage the data they collect to get a deep and meaningful understanding of their own operations, processes, customers, and performanceacross and between departments and from the front lines to the board room.

But how can business leaders join this new era? By working to shed light on the dark data that exists across their organizations.

Dark data is underutilized data. For mature, BI-first organizations, the only truly dark data may be unstructured or difficult to parse, such as call center transcripts or footage from security cameras. However, most companies that haven't yet embraced a fully data-driven culture still harbor vast amounts of dark data that's not being leveraged to its full potential. Whether that's customer data siloed in the CRM or machine sensor logs pulled from a factory floor, our mission is to help business leaders actively and diligently examine their digital business environment in search of novel ways to center data in their strategic thinking.

With the right tools and the right mindset, the insights pulled from dark data can drive innovation, optimization, and growth. There are three key ways that Zoho Analytics can help with this leap forward. First, we have automated and streamlined data preparation to make it easier to ingest and normalize massive data streams from a wide range of sources and data lakes. Second, we have built out a suite of intuitive AI tools that can empower employees at all levels to unearth critical business insights quickly and easily. Third, we have launched advanced data visualization and sharing functionality to make those insights meaningful and accessible to key stakeholders across the organization. With the upcoming release of Analytics 6.0, we've strengthened these offerings across the journey of your data.

Generating insights no longer requires sophisticated technical fluency, developer skills, or familiarity with data architecture. Instead, our modern BI platform helps business leaders realize the promise of truly contextual intelligence: analytics and insights that allow every employee to understand the problem, consider the solutions, and make decisions driven by data. This way, every company-not just the big players in the information economy-can reap the benefits of advanced, integrated, and accessible insights built from the data generated by their own business operations.

ANALYTICS ROADMAP

Coming Soon: Analytics 6.0

Improved functionality across every step of the data journey

Analytics 6.0 is designed to foster data-centric thinking at all levels of business operations. With enhanced support for self-service BI, non-technical users will be able to perform end-to-end analytics quickly and easily as part of their routine responsibilities. At the same time, more advanced users—such as data scientists and analysts—are able to perform predictive analysis, build custom ML models, and conduct complex statistical studies of a large volume of data.



What does Analytics 6.0 have to offer?



Data Preparation

Improve data accuracy with automated data preparation and enrichment.

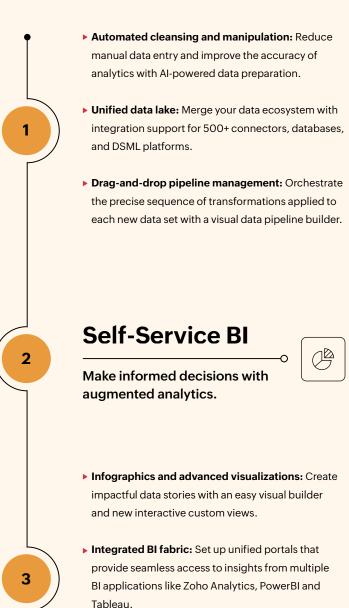
- Decision Intelligence: Let Zia—Zoho's Al assistant-automatically analyze your data visualizations, highlight key trends, and offer recommendations on what to do next
- Data science simplified: Train a new ML model inside Zoho Analytics, or import and manage an existing model built on another framework, to ensure easy oversight of your proprietary algorithms.
- Advanced analytics: Capture a more accurate data picture with anomaly detection, key driver analysis, scenario analysis, and clustering.

F

Data Storytelling

Democratize data insights with sophisticated BI fabric and better data storytelling.

With **Analytics 6.0**, organizations can seize the data and drive lasting digital transformation. Foster data democratization with a unified, easy-to-use platform capable of improving every stage of the data journey. Get insights with richer context, uncover new ways to grow the value of your data, and build a truly data-centric culture.



Data storytelling at scale: Tell immersive data stories without scripting through automated reporting features and drag-and-drop builders.

Want to learn more?



Schedule a call with an Account Manage

Getting to great analytics: Uncover the power of strategic data management

Start leveraging data management to drive strategic goals, grow the value of digital assets, and surface the insights trapped in your data.

The old tools for analyzing business performance can no longer keep pace.

preadsheets and single-product reporting have no answer for the scalability and immediacy of insights offered by today's deeply integrated, Al-powered analytics solutions. And because the volume, variety, and velocity of data increases by the day, the need for powerful BI software is greater than ever. Teams need solutions that can transform disparate data points into actionable insights that are meaningful to employees at any level of an organization.

With BI platforms like Zoho Analytics, every employee can be empowered to leverage data to derive insights: unwieldy reporting tools can be replaced by drag-and-drop dashboards and embedded visualizations: unstructured data can be surfaced, transformed, and parsed using natural language queries; and AI-driven suggestions can help create a data story that every audience can understand.

In this installment of Zoho Solution Highlights, we'll explore the key role analytics systems can play in fostering data literacy and empowering every employee to make data-driven decisions.



Dashboards



DataPrep



Zia Insights & Ask Zia



Dashboards

Better decision-making through democratized visualizations and contextual analytics

Centralize data management, build cross-functional dashboards, and uncover second-order insights

PROBLEM

Using spreadsheets to measure overall performance requires data from different systems to be collated, combined, and analyzed manually.

▶ While most business apps can offer a basic snapshot of individual team performance, more sophisticated or contextual reporting requires a lot of manual interventions. Data may need to be pulled from disparate systems owned by different teams, manually uploaded to a spreadsheet, and then reconciled, normalized, and analyzed by a savvy domain expert.

A skilled Excel user can create sophisticated spreadsheet reporting, but these systems break easily, offer poor data security, make versioning complicated, and struggle to scale as the volume of data grows. For metrics your organization measures over time, this manual reporting process must be completed consistently, month after month, regardless of personnel changes or limited team bandwidth. In the case of fast-moving business metrics, the data latency of manual reporting can also be a big problem, as you can only analyze performance as quickly as teams can pull and upload the latest data.

Although many business leaders still value the flexibility of spreadsheet reporting for many of their outside-the-box performance metrics, this creates a critical bottleneck when it comes to generating and leveraging business insights. The more manual interventions the process requires, the less

efficient, accurate, and timely it becomes, which in turn slows the flow of data across your organization.

SOLUTION

Automate data analysis and empower employees with on-demand, cross-functional performance metrics.

▶ The first step to building robust, reusable, multidepartmental reports is to de-silo your business data. By integrating Zoho Analytics with all of your critical business systems, you can automatically push key performance metrics from disparate departments to a single unified data repository. With over 50 prebuilt visualizations as well as an AI assistant that accepts natural language queries, even non-technical employees can begin building sophisticated and impactful visualizations that are fully aligned with your organizational objectives.

Role-based provisioning and row-level security controls ensure that sensitive or proprietary data remains hidden and secure, revealed only when necessary. Because users are engaging with a personal view of the dashboard rather than the underlying data itself, they can filter, analyze, and transform the visualizations without damaging or disrupting the database on which your BI depends. Once an effective visualization has been created, it can be re-embedded inside the software your employees use every day, allowing you to share contextual insights with frontline employees without having to add them to your Analytics backend.

USE-CASE SCENARIO:

A major distributor of premium construction materials has planned an industry tradeshow targeting installers and resellers. Promotion for this event involves direct outreach from sales account managers, a major email marketing campaign targeting past customers, as well as paid digital advertising in the city where the event is being held. The organizers need to monitor how many signups are coming in from each of those different channels overseen by different teams. Historically, they've done all of this through a complicated series of spreadsheets, but they are looking for a better solution.



OUTCOME:

Better data transparency, more informed decision-making, and a robust data-driven business culture.

▶ When organizations embrace data democratization features like Dashboards in Zoho Analytics, they foster innovation, see improved decision-making, and build data literacy across the organization. As data becomes more understandable and accessible, it becomes more useable.

In order to leverage organizational data assets, you have to forefront the role of data in the organization. By deploying

This year, they have integrated their sales, email marketing, Google Ad Manager, and event management platforms with Zoho Analytics, allowing them to conduct detailed ROI analysis measuring the effectiveness of their different promotional activities. They can identify and reward top-performing sales executives as well as calculate the cost per attendee for all of their paid activities. If the attendance forecast is low, the event team can make a clear case to leadership that additional digital advertising is necessary to reach their goals.

contextual dashboards and visualizations inside the tools employees use most, leaders highlight the active ways data can inform decision-making at every level.

Working from a shared, accurate, and coherent data story, it's easy to spot market trends, adjust production and staffing levels, or pivot to focus on the business areas that generate the most revenue. With Dashboards in Zoho Analytics, teams get the contextual insights they need to overcome operational challenges, improve efficiency, and stay agile in even the most competitive markets.



Improve the quality and accuracy of data by automating imports, data transformation, and metadata analysis

PROBLEM

Manually cleansing and processing data from multiple sources is impossible at scale.

• Capturing data is easy. Making data useful takes work. That's why most organizations struggle to maintain data hygiene and accuracy. This is a result of many factors: different formats and file types; human error; poor deduplication processes; or broken integrations. And as the complexity and volume of data grows, so do the challenges to standardization.

If data is being processed manually, it means employees are wasting hours simply extracting data from across an organization's app ecosystem. Once captured, the data needs to be structured so it is legible to other software systems. That usually means deduplication and cleansing records, blending SQL datasets, and mapping data to the appropriate location in the organization's systems. And that gets repeated any time new information is added.

The alternative is no better: without this tedious work, useful data gets left behind while bad data is allowed to infiltrate systems. Of course, when strategic goals are built around incomplete or inaccurate facts, critical errors and unforeseen blind spots can impact outcomes and prevent accurate business forecasting.

SOLUTION

Automate data synchronizations, set rules for transformation, and ensure the quality of all your organizational data.

Rather than forcing department managers, division heads or team DRIs to waste time importing and validating data, use DataPrep to streamline and cleanse all information generated by and imported into your key business systems. Pull data from any of 50+ sources—including major cloud software platforms and all common file types—then use DataPrep's 250+ prebuilt data transformation functions to quickly and easily process, validate, deduplicate, and normalize that data. Where other BI tools require complicated SQL coding to join tables and blend data, DataPrep is able to easily ingest diverse batches of information, reducing the number of expensive BI expert needed to oversee your data ecosystem.

If your organization uses Zoho Analytics, DataPrep can act as the initial filter ensuring all imported data meets the highest quality standards before it is folded into your larger BI picture. However, DataPrep can also be used without a full Analytics implementation. With a standalone DataPrep subscription, you can pull data from other systems—such as your CRM database-into DataPrep, cleanse, de-duplicate and merge the records, and then update those same records in the original system they came from. This kind of routine data quality management ensures your employees are always working with the best possible set of information, even if you aren't ready for a fully fledged BI initiative.

USE-CASE SCENARIO:

The CFO of a mid-sized furniture retailer wants to build out business analytics that can speak to the general financial health of the organization. Their CRM offers part of the picture, but to get a full view of the health of their business, they will need to pull data from their procurement, accounting, and inventory systems.

Unfortunately, these different systems use slightly different field names and display the data in slightly different ways. For example, in the CRM, the name field collects both first and last name, and deal amounts include a dollar sign as part of the field data; however, their accounting software has separate fields for first and last name, and the transaction amount field omits the dollar sign. Not only does this make blending the data difficult, but the inconsistencies have created a lot of duplicate records, which have now badly skewed their data pool.

To remedy this, they have decided to pass all of their historical transaction data through DataPrep. This will correctly map all of the relevant fields, normalize how data is displayed, and deduplicate the records that were

OUTCOME:

More data-centric thinking fueled by more accurate quantitative insights

Building a more data-savvy company culture means proving at every level of your organization-from the C-suite to the front lines—that the story your data is telling is worth paying attention to. Every nonsensical report, inaccurate forecast, and wrongheaded assumption erodes general trust in your larger BI strategy, reducing institutional buy-in and org-wide adherence to the work of consistent data entry and management. That's why all successful data-centric organizations must be built on a foundation of trustworthy data.

Using DataPrep to ingest and validate all of your critical data past, present, and future performance. Giving leadership

created accidentally during past imports. Moving forward, DataPrep is set to automatically pass all new data through the same "pipeline" of transformations, streamlining the import process and ensuring all future insights are built on data the CFO can really trust.



access to those insights will, in turn, train them to rely on data for their decision-making, increasing their respect for and careful oversight of the data systems they manage. With a bit of diligence, this can trigger a virtuous cycle: better data will beget better insights, which will, themselves, beget even better data.

Over time, your organization can develop business intelligence that draws on data from every system, allowing teams to visualize and monitor the complementary and competing elements informing current conditions, along with fine-grained insights about what to do next. streams will provide a clearer and more accurate picture of



Enable deep data exploration, predictive analytics, and actionable advice at scale with Zoho's conversational AI interface

PROBLEM

Employees looking for analytics are prevented by poor permission management, opague systems, and overwhelming volumes of data.

Employees want to make better, more data-driven decisions. The problem? Generating data-driven insights requires a fairly sophisticated understanding of where the data is housed as well as the right query terms or datasets to include in the analysis. Building meaningful reports and correctly interpreting the results adds another level of difficulty.

The result is that when employees want to dig into data, they face lots of barriers: poor access permissions; a lack of awareness about the existence or location of information; insufficient or overly complex report-building software; and an inability to distill meaningful information from millions of data points. Even teams eager to understand and act on cross-organizational data can't get started under these conditions.

People still need data insights, so organizations tend to centralize data analysis among a few highly technical employees. Because their time is both costly and scarce, requests for analytics have to wait until the specialized employee has time. And since teams can't explore the data on their own, they're in the dark about the range of information available and the questions they should be asking. Of course, lack of analytics doesn't stop decisions from being made; it just means decisions aren't being driven by data.

SOLUTION

Equip employees of all levels with an easy-to-use conversational interface that can quickly unearth insights and trends.

▶ Zia, Zoho's AI assistant, accepts plain, natural English queries, making analytics available to everyone. Ask to see "last month's sales per product" or "ticket velocity by channel," and Zia pulls data from the relevant tables, generates a report, and suggests visualizations for displaying the results. Zia can be used to join data that isn't naturally linked, too; it can pull tables from different accounts and create new data sets to mine for insights.

With Zia, employees don't need coding skills in order to build reports; it makes data exploration and analysis accessible to everyone. Turn raw data into actionable insights with the "Explain Data" feature, customize Zia to provide insights based on time series and seasonality, or dig into specific data points for deeper variance and anomaly analysis.

As Zia learns from the patterns of past questions and answers, it starts to provide smart suggestions about follow-up questions and supporting phrases to include. Because Zia understands correlations in data, it will highlight trends, outliers, and top contributing measures, and can also offer predictive analytics.

USE-CASE SCENARIO:

A junior marketer at a resort-wear clothing brand has been asked to come up with a series of summer campaign ideas to help drive interest leading into their most profitable season. The last two years running, the marketing campaigns have returned unpredictable or underwhelming results. This year, the marketing mana wants to do more segmented promotions based on ke buyer personas, but the buyer personas created by the team feel a little flat and unspecific.

The junior marketer is given access to the company's Zoho Analytics account, which has been integrated w their ecommerce, social media, and email marketing platforms. The marketer begins to explore the data,



OUTCOME:

Democratization of BI, better data fluency, and improved decision-making at every level

▶ It's one thing to build a data-driven leadership layer; it's another thing to build a data-driven organization. To accomplish this, key stakeholders at all levels need to personally engage with and benefit from your organization's business intelligence infrastructure. When employees can ask simple questions and get understandable answers, data will stop intimidating them and start empowering them. Over time, this routine exposure will help to orient your entire operation

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asking Zia a series of increasingly specific questions in order to reveal interesting trends in the data. They don't know what they're looking for precisely, but they're able to uncover more and more relevant information as they explore.

By combining hard data from Zoho Analytics with soft insights from sales reps and purchasing managers, the marketer is able to generate a clear set of personas with distinct preference and buying behaviors. The marketing manager adopts their findings and uses them as the backbone of the team's promotional strategy, fueling more specific and impactful marketing that speaks to the needs and desires of all the brand's potential customers.

toward a more empirical way of doing business, where the first and last question on every project, investment, or plan becomes, "Have you checked the data on this?"

With traditional BI tools, cultivating this degree of comfort in a meaningful percentage of your workforce would require a massive investment in both hiring and reskilling. However, with Zia, employees at all levels of technical fluency can feel confident they are making informed decisions. This will keep your organization nimble and ready to take on the challenges and opportunities waiting on the horizon.

FEATURED INTEGRATIONS



Optimize processes across your data operations with these featured integrations

The power of a BI solution is in how it helps applications communicate. With hundreds of native integrations and connectors, Zoho Analytics can plug into existing systems to unify their data insights, or serve as the center of an extensible data ecosystem.

Check out these featured integrations to find new ways to streamline your data operations.

ChatGPT + Zia in Zoho Analytics

in

ChatGPT Analytics

Use a conversational interface to blend public and organizational data and get deeper, crossfunctional insights without coding.

P erform deeper, richer analyses by including data from the public web by integrating ChatGPT with Zoho's Zia for smarter reporting and analysis. By bringing data from the public web into Zoho Analytics, organizations can enrich their own datasets and see deeper, more contextual analysis. Teams can create dashboards to benchmark performance against competitors across industries and then use these new datasets to drive further analysis.

This integration also eliminates the need to know SQL in order to work with large datasets; ask in plain, conversational language, and get the data displayed in an understandable format. Or ask Zia for the right formula and build KPIs from multiple columns without needing to create or search for a formula.

Teams can also get conversational insights—such as suggestions about industry or country-specific synonyms to include—or recommendations for follow-up questions. With sophisticated analyses generated from simple questions, every employee is empowered to explore data, generate insights, and make decisions with confidence.

Zoho Desk + Zoho **Analytics**



Get deep insights and provide more proactive support responses with anomaly detection, highly customizable dashboards. and fast collaboration with the Zoho Desk and Zoho Analytics integration.

n the era of multichannel and IoT, teams need to know more than just the volume of incoming tickets or the time elapsed before first reply. Providing customers with a loyalty-building support experience means understanding the context before starting the conversation. That requires access to data with deep insights: ticket inflow by channel; SLA compliance; ticket backlog by agent; and sentiment analysis. The native integration between Zoho Desk and Analytics provides this visibility inside the familiar Zoho Desk interface.

Once alerted by Zia's Al-powered anomaly detection, support managers can look to dashboards and visualizations to understand the problem and re-balance resources. Zia can also offer narrative insights to highlight problems that may not be readily visible to a human. The easy-to-build, easy-to-share dashboards inside the Zoho Analytics-Zoho Desk integration foster collaborative problem solving while keeping teams focused on the right issues.

Zoho CRM + Zoho Books + **Zoho Analytics**



Refine communication, scheduling, and billing strategies and eliminate the frictions that cause delays in invoicing and payment with this three-way integration.

hen invoices are easy to understand and easy to pay, the likelihood of on-time payment significantly increases. By integrating Zoho CRM with Zoho Books and Zoho Analytics, teams can dig into the many factors that take visitors from potentials to closed deals to paid invoices.

Once Zoho CRM's Deals module is integrated with invoicing in Zoho Books, an invoice can be triggered as soon as a potential is marked closed/won. When paired with the advanced reporting and visualizations in Zoho Analytics, teams can get sophisticated, cross-functional analytics about the current state of the business: time from closed deal to sending the invoice; percentage of closed deals that have paid invoices; number of invoices drafted vs. sent vs. paid; and invoicing conversion efficiency by sales rep.

With the Zoho Analytics integration, teams can pinpoint the specific moments that generate friction or delay and identify the communication and billing channels that generate the highest rates of on-time payment.



Mahesh Penumatsa, Solutions Consulting for North America

IN FOCUS **ZOHO SOLUTIONS CONSULTING**

he Zoho Solutions Consulting team partners with both new and existing customers to deploy scalable solutions that address complex business problems. Drawing from resources across Zoho, Solutions Consulting implements highly customized systems that utilize the full range of Zoho technology. Mahesh Penumatsa leads Solutions Consulting for North America, offering professional implementation services that can optimize the Zoho platform for your unique business needs.

Q: For the Zoho customers who are not familiar with Zoho's Professional Services, could you talk a bit about the makeup of the team, the scope of the projects you oversee, and the types of services you provide?

Mahesh: Our core mission is to help mid-market and enterprise accounts roll out new applications or processes across their key business functions. If your organization doesn't have the bandwidth or product familiarity to oversee your next software implementation, we can take you from planning to launch, quickly and with confidence.

In terms of scope, it's really up to the customer. Some customers ask us for help on smaller projects—such as building advanced custom dashboards designed to monitor critical business systems. Some ask us to re-optimize existing implementations so their Zoho products scale to meet new business growth. Others are looking for

more extensive digital transformation—such as deploying Zoho's integrated CX suite across multiple teams or departments.

In either case, we staff up your project team with the right combination of product and development specialists, offering you the peace of mind that your implementation will go as smoothly as possible.

Q: I know Solutions Consulting does a lot of implementations for new customers, but what about for our readers who have already been working with Zoho for a while? How can companies with established Zoho deployments benefit from working with SC?

Mahesh: It's probably summarized best this way: we look at things with fresh eyes. You know how your business operates and how your current Zoho system is built. However, in the process of getting business done, day after day, you may have accepted certain limitations that aren't actually limitations. That's where we come in. We know Zoho backwards and forwards, so we often find features or workarounds that can dramatically increase efficiency or expand functionality for your implementation.

This can include tightening the integrations among solutions in the Zoho ecosystem, configuring APIs for third-party apps, or developing custom interfaces. We can also be a huge help if you decide to switch out one of the non-Zoho solutions in your IT stack for a Zoho product. In that case, we can be there with you from the start, customizing your new app and importing data from existing systems. This way, we can really help organizations streamline their implementations to reduce technical debt and other friction points.

Q: Every successful implementation must involve a lot of planning as well as knowledge transfer by the customer. How does your team scope a new project? How do you get things started?

Mahesh: The first step in any implementation is discovery and roadmapping. This is where our team works with the system owners-including IT admins, departmental heads, or senior stakeholders-to understand current requirements and pain points as well as the organization's future goals and growth plan.

As we learn about your existing system, we will conduct a fit-gap analysis, comparing your requirements against Zoho's full technology suite. This allows us to anticipate any challenges and recommend the best combination of solutions for your implementation. With that discovery process complete, we can build a roadmap outlining proposed milestones, timelines, and priorities. Once the plan is approved, we will identify which members of our Professional Services team will lead the project as it moves into the implementation phase.

Q: What should the customer expect during implementation? How do you manage all of the various requirements? Are there strategies you've developed to ensure successful implementation?

Mahesh: The implementation phase is when all of the real development work takes place. We configure your products, integrate necessary systems, and migrate data from legacy applications. During this stage, our team conducts user testing to ensure that the platform is easy to use and is meeting expectations.

Throughout this phase, our Professional Services team is in regular contact with the project DRIs in your organization to ensure that the solution is being customized and configured according to the agreed-upon requirements. We follow a rigorous Agile methodology, which ensures you can provide feedback on your new system as it is being built. This increases alignment, reduces rework, and prevents the kind of scope creep that can transform standard implementations into huge headaches.

Q: How about after the implementation? Who services and supports the solution after hand-off? And what options are there for organizations still wanting expert help from Zoho?

Mahesh: After the implementation, we work with your IT teams or system stakeholders for deployment planning. This usually includes documenting key system processes, final validation testing, and then training the new product owners and users.

At hand-off, we transfer ownership to your internal IT team who will be responsible for maintaining the solution going forward. If the customer would like ongoing, hands-on assistance from someone inside Zoho, we recommend that they sign up for Zoho's Enterprise Support package. Although Zoho's Classic Support team will be able to troubleshoot issues as they arise, Enterprise Support comes with a dedicated technical account manager who can guide things more proactively. In that case, we bring the new technical account manager up to speed on the implementation before final hand-off.

Q: How can an organization find out if the Solutions Consulting program is right for their business?

Mahesh: Account Managers are always the best folks to call when you want to understand which Zoho services or products would improve your implementation. Our Account Managers are product experts who work with businesses across industries and verticals. They should always be the first place to turn when you want expert advice on growing the value of your implementation.

HOW RENU ENERGY **CUT PROJECT TIME BY 50%**

Renu used Zoho Analytics and uncovered optimizations across the organization.

Who is Renu Energy?

enu Energy Solutions installs and maintains R customized solar power, energy storage, and electric vehicle charger solutions for residential and commercial properties. In the last five years, they've experienced rapid growth, earning them a slot on the Inc. 5000 Fastest-Growing Private Companies list for three years in a row (2020, 2021, and 2022). In 2019, Renu kick-started their digital transformation by implementing Zoho CRM and Zoho Projects, but soon realized they would need significantly improved BPM to keep pace with demand. It was time to replace their spreadsheets with an actual analytics solution.

What problem led Renu to choose Zoho?

 ${\bf R}$ enu was facing challenges from data siloes, with no easy way to blend data from multiple sources automatically. This led to lots of duplicate data entry that

was compounded by a complete lack of pipeline visibility for the different project teams. Teams couldn't anticipate what was coming, so they lived in a perpetually reactive stance. That created a lot of stress for the customer-facing agents and project managers; employee retention dropped, and turnover became an increasingly pressing problem.

Because Renu stored all project data in spreadsheets, they had no way of analyzing timelines to pinpoint the sources of delay. Nor was there a mechanism to turn the rows and columns spreadsheets trapped in into visualizations like charts and graphs; this made it very hard to know which

at Renu Energy Solutions

processes were ripe for optimization, which could be automated, and which could be discontinued.

Of course, the lack of a coherent analytics system meant low levels of data literacy among employees. Teams needed to start making more informed decisions, but without understandable data visualizations, most employees couldn't spot the patterns and trends in project data. Renu had a lot of useful data, but without a comprehensive system, it couldn't add much value to the organization.

What solution did Zoho provide?

R enu's BI team integrated Zoho Analytics with their existing tech stack. Now, every data import is automatically cleaned and blended by Zoho DataPrep. Since project length is Renu's most important KPI, they built multiple dashboards to reveal the different factors informing project duration. By tracking the time spent in each stage

(e.g., site survey, permit approval, and install), the BI team could spot inefficiencies within different tasks and reduce the number of slowdowns.

The team also configured departmental dashboards for tracking deal financing, sales data, and customer service

" We had rows and columns of information, but no way to see the scale and stages of our different projects. In order to make better decisions, we needed better visualizations.

John Sheldon Director of New Business Capabilities

KPIs. Now that Zoho Analytics pulls information from across Renu's tech stack, it's possible to build monthly forecasts by customer, territory, and contract. These forecasts are embedded via widgets into the tools the employees use most, giving them at-a-glance insights into their performance as compared to their targets and goals.

By creating detailed dependency maps, Renu could see the dozens (and dozens) of specific tasks needed for residential vs. commercial projects. Because the prerequisites for each task had been identified, the team could also spot opportunities where tasks could be run in parallel, ultimately resulting in a significant

What benefits did Renu experience?

fter implementing Zoho Projects and Zoho Analytics, Renu cut their average total project time in half, going from 100 days to 50. The impact on the company has been huge: increased customer satisfaction, a strengthened cash flow position, happier employees with lower attrition rates, and stronger relationships with manufacturing and financing partners.

"

All these different systems come together to achieve a better customer experience and also a better, healthier business.

John Sheldon

Director of New Business Capabilities at Renu Energy Solutions

By running more efficiently, Renu was also able to uncover new revenue opportunities, enabling them to create an entirely new service department to maintain systems after install. This new business function was easily introduced into the existing Zoho structure by adding a new layout in CRM, new templates in Projects, and a new workspace in Analytics. Renu has exponentially extended customer LTV, alongside creating a recurring revenue model that improves their financial stability.

ZOHO PRODUCT PORTFOLIO

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

With 60+ products and more in development all the time, Zoho offers customizable apps to tackle every business problem. Check out this selection of some of our most useful apps for Zoho CRM users.

CUSTOMER ENGAGEMENT

The Zoho sales platform offers coverage for every step of the sales pipeline. From live website chat to supporting users after the sale, here are a few of our most popular apps for customer-facing teams.



BUSINESS INTELLIGENCE & PROCESS MANAGEMENT

As data improves, so do the processes it touches. These Zoho apps help improve data accuracy, streamline processes, and build new workflows finely customized for organizational needs.

Creator	Design, build, and deploy custom solutions for your organization's unique business needs.	Flow	Automate cross-app processes and de- silo organizational data with Zoho's drag-and-drop integration builder.
Analytics	Understand past, present, and future business performance with AI-enabled self-service BI.	DataPrep	Connect, explore, cleanse, and enrich data for analytics, machine learning, data warehousing, and more.

PRODUCTIVITY & COLLABORATION

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

Meeting	Conduct secure, cloud-based meetings and webinars to nurture and convert more leads.	Zoho Cliq Zoho Cliq Zoho Cliq Zoho Clip Cliq Zoho Clip Clip Zoho Clip Zoho Clip Zoho Clip Zoho Clip Zoho Clip Zoho Clip Zoho Collaboration while keeping your corporate communication secure.
Zoho Mail	Scale your email system with advanced encryption, message recovery, and fine-grained security policies.	Simplify access management by storing, organizing, and managing team files in a single location.
Connect	Create a centralized space for team discussions, resource sharing, and employee announcements.	Zoho Projects Projects Projects Projects Plan, track, and collaborate on projects while precisely capturing the time spent on every process.
Xoho Vault	Manage team and personal passwords to safeguard your business accounts from cyber attacks and insider threats.	ZohoBuild your internal KBs and employeetraining programs on Zoho's in-housecontent management platform.

FINANCE

Reduce the risks of revenue leakage with end-to-end accounting management. The Zoho Finance suite streamlines and automates key financial processes while providing real-time insights into inventory and expenses.

Books

Handle every aspect of accounting and drill down into the health of your business.

Simplify employee expensing with mobile receipt capture, OCR, and one-click reporting



Interested in discussing the other software solutions available from Zoho?

Schedule a call

	Build customized invoices that align with your brand, and automate bill delivery based on project status.
Zoho Inventory	Move to a centralized invoice management system flexible enough to serve every sales channel.

Schedule a call with one of Zoho's Account Managers to explore how Zoho can help modernize your business operations.

Continue your journey with our targeted resources for Zoho's larger customers



Zoho for Enterprise Webinars Get industry insights and learn about new products through our live webinar series.





Business Pulse Solutions Highlights Videos Want to learn from the Zoho experts? Check out these bite-sized videos to get some quick tips for optimizing your implementation.



Zoho Buzz Newsletter Sign up for our monthly newsletter to stay in the loop about the latest product updates.



Enterprise Insights Blog Read the latest in software trends, leadership practices, and business strategy.



Enterprise Perspectives eBook Series Take a deeper dive into the technology, culture, and leadership trends shaping today's global business landscape.



A message from the people behind Zoho

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, 1500+ marketplace extensions, and 100 million users around the world.

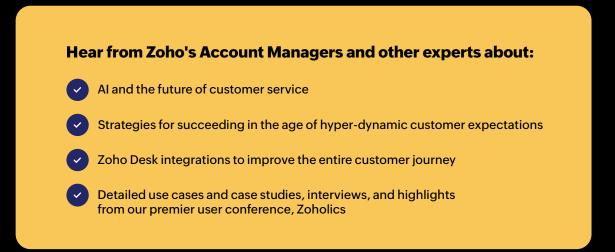




What's up next for Zoho Business Pulse?

Watch for our next issue, which will explore how the new features and AI enhancements in Zoho Desk can help deliver better, faster, and more contextualized customer support experiences.

With Zoho Desk powering your support operations, teams create customizable modules to suit every type of ticket, drive productivity with Al-suggested workflows and insights, and provide customers more opportunities for positive interactions with the organization.



Get your copy of Zoho Business Pulse and learn how to build customer support processes that become an organizational USP. Use Zoho Desk to make customer support an organization's best source for uncovering innovations and spotting new revenue opportunities.

Looking to get more from your Zoho implementation?

Keep an eye out for Zoho Business Pulse.

