ZOHO

2022 Customer Success Resources for US-based Accounts

Index

Welcome to ZOHO

Thank you for choosing Zoho as your newest technology partner! Over the next few months, your organization will pass through some or all of the following implementation stages:

Ongoing
Maintenance

Training

Deployment

Data
Migration

Custom
Solutions

Product
Customisation

Product
Integration

Provisioning
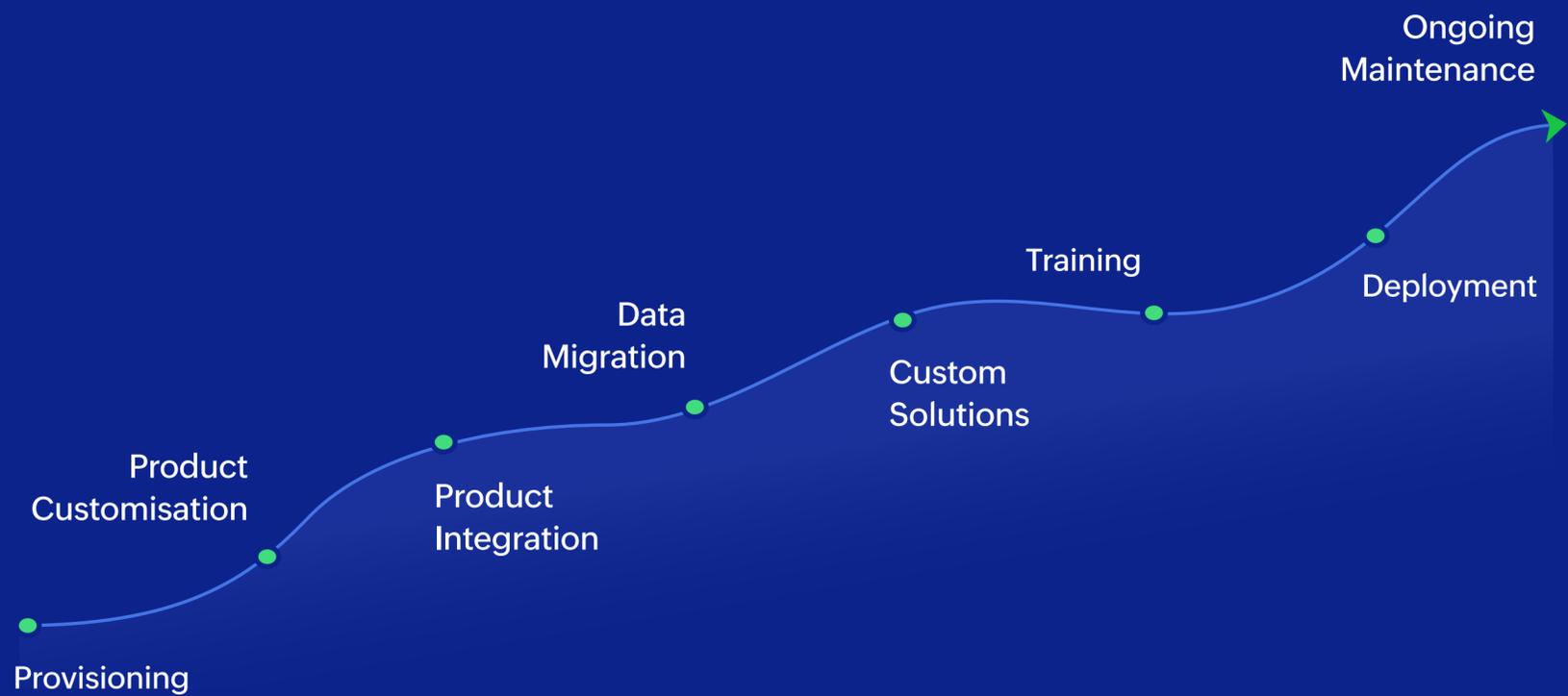
Depending on the particular support package you've signed up for as well as any external services you choose to engage, some of these stages will be managed by Zoho, some may be managed by your internal IT resources, and some may be managed by a certified Zoho implementation partner.

Definition of implementation stages

Provisioning

Generating an account entity, designating datacenter ownership, inviting super admins, and configuring role-based access control (RBAC)

Product Customization

Setting up out-of-the-box product functionality, such as custom fields, layouts, workflows, and custom modules

Product Integration

Connecting your new system to either third-party apps or other Zoho apps by means of native or custom APIs

### Data Migration

Importing applicable data from other systems to Zoho, which involves data cleansing, field mapping, and data validation/ testing

Custom Solution

Leveraging in-house developer tools to build new functionality into Zoho's apps in order to meet your organization's unique business needs

Training

Creating and distributing end-user educational materials explaining how to use and administer your Zoho products

Deployment

Beta testing, troubleshooting, and granting access rights to all relevant teams and individuals

Ongoing Management

Fixing issues, updating processes, and optimizing system performance for your organization

This guide is intended to provide new US-based mid-market and enterprise customers with a clear understanding of the resources available to you through the implementation process and beyond.

Zoho Account Management

Zoho's complimentary service to help nurture continued success for Enterprise customers. Account Managers use their expertise with Zoho products and services to provide customers strategic guidance on growing and optimizing their Zoho deployment.

Zoho Support

We offer a range of Support packages to assist our customers in resolving any technical issues that may arise during their time with Zoho. We place particular focus on Enterprise Support as an option that offers customers highly personalized technical assistance within the shortest time frames.

Zoho Partners Program

Zoho's network of trained and certified third-party consulting and implementation Partners can contract with customers to provide a variety of services including onboarding, implementation, consulting, and support.

Zoho Solutions Consulting

Our Solutions Consulting service works with customers who have completed their initial product setup to engage in goal-oriented implementation projects to augment their Zoho deployment. Solutions Consulting utilizes Agile methodology to complete time-boxed projects in accordance with an SOW. This paid service is offered subject to availability and a project suitability assessment.

Zoho Account Management

Account Managers, similar to "customer success" roles in other organizations, nurture long-term relationships with our customers by providing additional value via product education and strategic guidance. Zoho Account Management is offered as a complimentary service to help our US-based, mid-market and enterprise customers grow and succeed with Zoho.

What an Account Manager can do for your organization

Equipped with both strong business acumen and knowledge of Zoho solutions, your Account Manager can provide you with information and recommendations for the Zoho products and services that can best meet your requirements as your organization evolves over time.

For instance, if you're looking to upgrade your existing subscription or deploy additional Zoho solutions, your Account Manager can assist you, using deep knowledge of the Zoho suite and your unique processes. Likewise, Account Managers can offer informed guidance in selecting between Zoho's technical support offerings, solutions consulting, and our third-party network of Partners. Account Managers are invested in your continued success with Zoho.

While Account Managers can provide strategic insight into optimizing your Zoho experience, your Account Manager does not provide onboarding services or specific technical support. This means that they are not able to migrate data, configure workflows, customize modules, or resolve specific technical issues within your Zoho implementation. These specific requests should first be directed to Zoho Support or your Zoho Partner, where applicable. That said, if you need help with something that an Account Manager is not equipped to handle, they can still point you in the right direction to find the support you need.

Tasks handled by Account Managers	**Tasks not handled by Account Managers**
➤ Advise on Zoho products	➤ Perform data migration
➤ Guide you to the right internal resources	➤ Configure your products for you
➤ Suggest improvements	➤ Assist directly with technical issues
➤ Refer an implementation partner	➤ Consult on general business strategy

How to contact

If you know who your Account Manager is, the best way to contact them is via their direct email address. If you're not sure who your AM is or if you aren't sure of their email address, the best way to get in contact is via the team **contact form**. From this form, you can also set up an in-depth call to discuss the larger goals you have for your implementation.

You also have the option to request an account check-up, during which your AM will audit your product usage and provide a list of suggestions for how you can get more out of your Zoho technology.

While you can reach out anytime, many accounts benefit from starting the conversation with their AM around 90 days after signing up, post-onboarding. That will give you and your organization enough time to get up and running and become familiar with your Zoho implementation. At that point, you can do an account check-up, discuss your overall experience thus far, and explore how to optimize your deployment within Zoho.

Tips for initial meeting

In preparation for your first meeting with an Account Manager, it can be helpful to send them information about the primary use-cases or pain points you're looking to address with Zoho solutions, as well as the main Zoho products you'll be using (especially if you're subscribed to a suite, like Zoho One).

We also highly encourage you to be upfront with your AM about your overall experience with Zoho, whether it be positive or negative, as that will give them an opportunity to address your concerns and find solutions to any problems you may be facing.

Zoho Support

During the sales process, your organization will have opted for one of Zoho's three support tiers: **Classic, Premium**, or **Enterprise.**

SERVICES	CLASSIC (Free)	PREMIUM (20% of License Fee)	ENTERPRISE (25% of License Fee)
Toll-free support	8 hours/day, 5 days/week	24 hours/day, 5 days/week	24 hours/day, 5 days/week
Live chat	8 hours/day, 5 days/week	24 hours/day, 5 days/week	24 hours/day, 7 days/week
Max initial response time	8 hours	3 hours	1 hours
Multi-channel support	✓	✓	✓
Remote assistance		✓	✓
Dedicated Technical Account Manager			✓
Quarterly feature usage evaluation			✓
Early access to new features			✓

Classic Support

Zoho's Classic Support tier comes free with any Zoho product and provides multi-channel responsive troubleshooting and issue resolution. You can contact Support via email, webform, or toll-free number, and you have access to our extensive **knowledge base** and **community forums.**

Premium Support

Though Premium Support is available to organizations of all sizes, this package has been specifically calibrated to offer smaller organizations some of the perks of our Enterprise package without overshooting the amount and type of support that they generally need.

As such, the Premium tier offers expanded support hours, faster response times, and additional support services, such as remote assistance and onboarding assistance for up to 90 days.

Enterprise Support
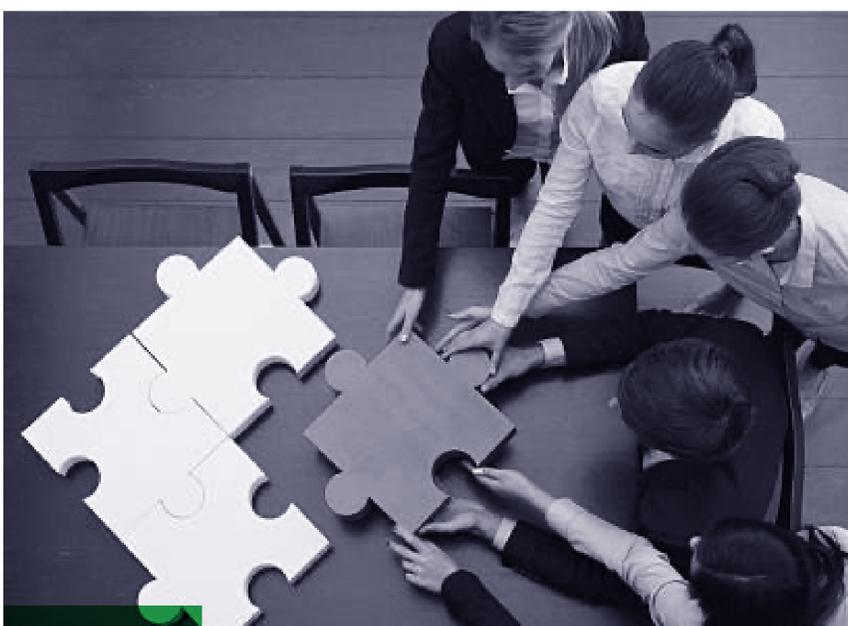
The Enterprise Support package—currently only available for Zoho CRM, Zoho CRM Plus, Zoho Desk, and Zoho One—provides more active and personalized support, offering all of the same services as the Premium package with the addition of a dedicated Technical Account Manager (TAM).

Your TAM will offer prioritized issue resolution, insight-driven guidance, and the quickest turnaround times. Customers with their own in-house developer resources and a dedicated Zoho admin tend to get the most value out of the guidance their Technical Account Manager provides, as they are best positioned to implement suggestions.

Scope of Enterprise Support

Your assigned Technical Account Manager (TAM) will be your Zoho admin's primary point of contact for application-specific and feature-specific questions, issue resolution, and debugging assistance.

They will also be available to discuss your company's requirements and provide guidance on how Zoho's product ecosystem can be implemented most effectively.

Enterprise Support does not include

- An outsourced Administrator for your Zoho applications

- Structured, classroom-style product training (consult with your Account Manager on which of our training options is the best fit for you)

- In-depth solution consulting, onboarding, and implementation (these requests will be referred to external Partners or Zoho's in-house Solutions Consulting team, who offer these services at an additional cost)

- Complex customizations, like report building, API integrations, third-party integrations, or custom Deluge functions

How to contact

When your organization first subscribes to Enterprise Support, you will be introduced to your Technical Account Manager who will act as your point of contact for future support requests. If your organization is just starting out with Zoho, your TAM will not be involved in the implementation of your Zoho deployment, but will be available for troubleshooting and support-related assistance.

After your Zoho solution has been implemented (either by your internal IT team or a third-party partner), you can submit general support tickets via the unique email address that was created for your organization. Calls will be scheduled if you have more complex questions or if you want to discuss your requirements in more detail. Enterprise Support is available 24/7, and targets an initial ticket response time of one hour.

Tips for initial meeting

When you first make contact with your Technical Account Manager, it's a good idea to introduce the person who will be the primary point of contact with Enterprise Support (this will usually be your Zoho admin). You should also aim to provide your organization's main pain points and be as specific as possible. This will help your TAM understand your requirements in context and offer suggestions and best practices to help you fit your Zoho apps to your broader business processes. When contacting Support for troubleshooting, try to have as much information as possible available about the issue, such as the steps that were taken before the issue occurred, the browser you are using, and screenshots or screen recordings of any error message or unexpected behavior, if possible. Keep in mind that tickets may be handled by someone who is not familiar with your account. If you are submitting a ticket on someone else's behalf, be sure to include that person's email address in the ticket.

Zoho Solutions Consulting

The goal of the Solutions Consulting team is to ensure customers see early success with their new Zoho technology. To accomplish this, the team uses Agile methodology to complete time-boxed and scope-boxed implementation projects with concrete goals and objectives.

Projects include customization, configuration, migration, integration and custom solutions, including optimizing existing systems, and coding custom features on top of the existing platform. Solutions consulting is ideal for organizations that have a defined business process that needs to be implemented on one of Zoho's software solutions.

Examples of past projects include implementing complex automations that streamline core business processes, building custom solutions for contractor management and customer engagement, and configuring custom API automations with industry-specific software platforms.

NOTE:

Solutions Consulting is a paid service, offered to select accounts subject to availability and a project suitability assessment. The Solutions Consulting team does not offer business consultation services to help you define your business processes, and is not positioned to offer ongoing developer services beyond the agreed project timeline.

Customer requirements

The Solutions Consulting team currently works with customers who have 25–500 users, and have been working with Zoho for at least 6 months. They will be expanding their services to new customers starting in 2023, offering accelerated onboarding by performing prioritized provisioning, customization, integration, and data migration tasks. Solutions Consulting works with all Zoho products except for Catalyst, and has particular expertise in the CRM Plus suite.

Project length

Each project is broken down into two phases: a 1–2 week Discovery phase followed by a 1–4 week Implementation phase. The team offers 1 week of hypercare after implementation, after which you will be transferred back to the regular support channels for your chosen support tier. Additional implementation phases can be booked to incrementally increase the scope or achieve new goals.

Cost

There is a $1500 flat fee for the Discovery phase, which will be applied towards the cost of the Implementation phase if you proceed with the project. The Implementation phase is charged at $175/hour, up to a maximum of 150 hours. The team will provide an estimate of the actual hours required at the end of the Discovery phase and will not exceed this estimate without your agreement.

Solutions Consulting process

There will be an initial Service Assessment call to allow the Solutions Consulting Project Manager to learn more about your business process and requirements and discuss how it fits into their project process.

Your success is the team's biggest priority, so they will never take on a project better suited to a different team or service. During the Discovery phase, the team will meet with you 3 times a week to discuss the details of your requirements and will then prepare a configuration plan, scope of work, and list of prerequisites, which they will present to you within one week.

They will explain their proposed solution, the products involved, any required or recommended changes to your Zoho subscription, and any items you requested which have been identified as out of scope, and why. If either you or the Solutions Consultant Project Manager determines, either after the initial call or after the paid Discovery phase, that they are not the right fit for your project, they will recommend another course of action, which may include an introduction to one of our consulting Partners. Once your team confirms the proposed scope of work, the Implementation phase can be scheduled based on mutual availability.

How to contact

Reach out to your Account Manager if you have a business process that needs to be automated or updated. If they think your project is a good fit for the specific project structure and targeted solutions the Solutions Consulting team offers, they will make the introduction and schedule an initial call with a Project Manager from the Solutions Consulting team.

Tips for initial meeting

The most important thing you need is a defined business process or set of requirements, as the Solutions Consulting team are not able to provide business consulting services. The details can be worked out during the initial call and the Discovery process, but a solid overall process is key to success.

Sample Project

Week	Phase	Tasks
Week 1	**Discovery**	✅ Create project SOW
		✅ Map out execution plan
Week 2		✅ Generate estimates (time and money)
Week 3	**Customer Preparation Period (Your responsibilities)**	✅ Discuss with internal stakeholders
		✅ Sign project SOW
Week 4		✅ Complete project prerequisites
Week 5	**Implementation***	✅ Deliver and validate new features with customer (weekly)
		✅ Document solutions and train relevant teams
Week 6		✅ Hand off solution for real-world use
Week 7	**Hypercare****	✅ Address any implementation defects
Week 8		✅ Transfer additional knowledge as needed

* Implementation phases can be repeated for additional scope.

** After hypercare phase, customer owns solution and contacts product support for future troubleshooting.

Zoho Partner Program

The Zoho Partner Program is a network of third-party product experts who have proven Zoho sales and implementation experience. You can choose from hundreds of Zoho Partners to optimize your Zoho deployment, or set up a completely custom implementation to meet your particular business requirements. If you'd like to discuss how the Partner program works, you can reach out to your Account Manager or Zoho's Partner Team.

Types of projects

Each Zoho Partner has unique expertise. Among the Partner network, you can find help with consulting, implementation, onboarding, and custom solution development across the full Zoho product catalogue. Partners also offer pre-built, customized Zoho solutions for specific verticals on the Zoho Marketplace.

Project length

Depending on the service agreement you establish with your Zoho Partner, work timelines can range from discrete projects, to long-term product support packages.

Cost

Since Zoho Partners are independent, third-party businesses, pricing will vary based on each Partner's terms of service. To learn about an individual Partner's rates, reach out to them directly for a quote.

What Zoho Partners can offer your business

Zoho product implementations from Partners can include customization, product configuration, migration from existing systems to Zoho, integration with third-party apps, workflow automation, custom module development, user training, and other related services.

Partner support services

Your Zoho Partner will typically be the primary point of contact for support services relating to any projects you've contracted with them. However, the duration and availability of support may vary based on the terms of your agreement with them. This means that, when working on a project with a Partner, any technical support requests that arise should be directed to the Partner, rather than a Zoho team.

If you have a paid Zoho support package as part of your subscription, Zoho support will still be available as an option to offer assistance, but if the issue pertains to work you've done together with a Partner, it's recommended that you reach out to them first, as they'll be better equipped to understand the situation and your needs.

How to contact

You can search for Zoho Partners within your region on our Partner database or ask your Account Manager for suggestions. Some customers may already be working closely with a consulting Partner at the time they sign up for Zoho. If you think you'd be interested in working with a Partner to handle your implementation, it's recommended you start the search early to find an option that works with your timetable.

Tips for choosing a Zoho Partner

✓ Start by identifying Partners that specialize in working with businesses in your sector (such as healthcare, education, or media)

✓ Seek out in-depth case studies and customer reviews to determine whether a Partner has the right level of experience for your needs

✓ Look at how long they've been in business, and their total number of successful implementations

✓ Establish upfront whether they are able to work on the timeline you need for your project

✓ Prepare a document with all of your business requirements to send to prospective Partners

Limits of third-party Zoho Partner recommendations

On request, Zoho teams (such as Sales, Account Managers, or Support) may refer a specific Partner or a list of Partners to a customer to help with the implementation of the Zoho solution for their business. Any such Partner we might refer has previously worked successfully on behalf of several Zoho customers in crafting their Zoho solutions to match their business needs.

That said, Zoho cannot vouch for their successful completion of your specific project. Zoho stops at the Partner referral, and our engagement does not extend to any Zoho service or guarantee against services that might be contracted or provided by the Partner. Customers are not bound to accept or even consider this referral made by Zoho.

Quick Reference Contact Sheet

To ensure you can access the right resources as quickly as possible, we've collected all of the relevant contact methods for each of the resources listed above.

Account Management

AM team contact page: www.zoho.com/enterprise/lp/levelup.html

Customer feedback survey: survey.zohopublic.com/zs/zohocorp/E5CN32

Customer Support

Main support line: +1(888) 900-9646

Your support portal: help.zoho.com/portal/en/myarea

Zoho knowledge base: help.zoho.com/portal/en/kb

Solutions Consulting

If you aren't already working with the Solutions Consulting team, contact your Account Manager to discuss your options.

Zoho Partner Program

"Find a Partner" portal: www.zoho.com/partners/find-partner.html

Guide to choosing a partner: www.zoho.com/partners/images/how-to-work-with-a-zoho
-partner.pdf

Zoho Marketplace: marketplace.zoho.com/app/verticals

Additional resources

Enterprise Customer Hub: zoho.com/enterprise/customer-hub

Zoho for Enterprise Newsletter: zoho.com/enterprise/newsletter

Customer Success and Implementation: zoho.com/enterprise/customer-success

Enterprise webinars page: www.zoho.com/enterprise/webinars/

Zoho Spark (paid online training courses): www.zoho.com/spark/

Customer case studies: zoho.com/customers.html

Zoho user community: help.zoho.com/portal/en/community

Analyst coverage of Zoho: www.zoho.com/analyst-reports.html

Zoho in the News: www.zoho.com/inthenews.html