

# EVALUATING THE NEW ZOHIO ANALYTICS

AI-DRIVEN ENHANCEMENTS EXPAND ZOHIO'S PRESENCE IN BUSINESS INTELLIGENCE

## SUMMARY

Since its 2009 launch as Zoho Reports, Zoho Analytics has evolved into a sophisticated, AI-powered business intelligence (BI) platform. Its September 2024 release marks a significant leap forward, showcasing Zoho's commitment to democratizing data analysis through over 100 enhancements. By heavily investing in AI and machine learning, Zoho has become a strong competitor in the BI market, challenging established players and empowering users to make more informed, strategic choices.

## ZOHIO ANALYTICS TOOLS FOR DATA PREPARATION

Accurate insights and effective decision-making rely heavily on high-quality data, but companies' raw data often contains inconsistencies, errors, and irrelevant details. To address this, Zoho Analytics' AI-powered tools cleanse, transform, and enrich data before analysis. Users can review a quality summary of their data, identifying valid, invalid, and missing entries, with intelligent suggestions to enhance data quality. The platform can automatically recognize data types, suggest combinations of datasets, and allow for the creation of custom types. Intelligent widgets for functions such as histograms and outlier detection help users gain deeper insights. With over 250 data transformations available—including pivoting, unpivoting, and summarizing—Zoho Analytics enables users to shape their data without coding. Additionally, AI-powered enrichment features such as sentiment analysis, keyword extraction, and language detection provide advanced ways to contextualize data.

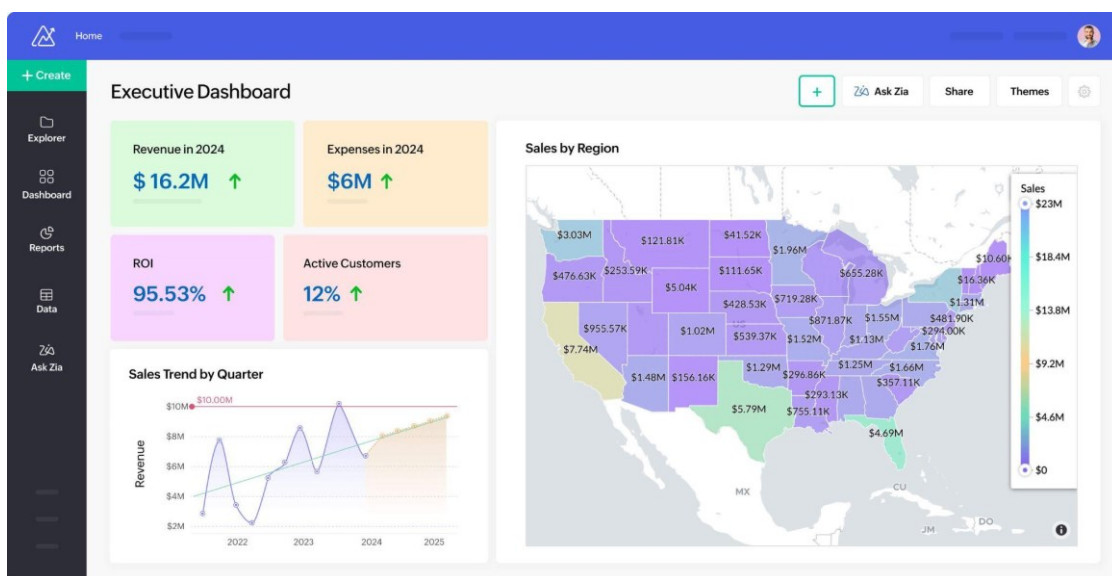
## DATA MANAGEMENT FEATURES

Zoho Analytics provides a range of tools for managing and analyzing data. It allows users to import, connect, or sync data—in various file types—from more than 500 sources, including databases and common business applications. The platform includes visual pipelines to ensure that data is accurate and ready for analysis. Users can model and organize their data through a drag-and-drop interface, adding custom fields and calculations as needed. Zoho Analytics includes data governance and security features such as access controls, audit logs, and compliance mechanisms to ensure that data handling is secure and transparent.

Collaboration is supported through features for co-authoring, sharing, and commenting on reports. Shared dashboards also facilitate collaboration and streamline workflows. Zoho Analytics enables real-time data processing and AI-driven analytics for more advanced needs. It also includes a Machine Learning Studio through which users with technical expertise can write SQL queries for detailed analysis. The platform also provides APIs and SDKs for custom development. This blend of user-friendly tools and advanced features makes Zoho Analytics a valuable solution for organizations to derive meaningful insights from their data.

Consider Zoho customer Integris Credit Union, based in Prince George, British Columbia, Canada. In financial services, Zoho Analytics can aid in functions such as credit assessments and fraud detection. Jeff Anderson, vice president of IT at Integris, described how Zoho Analytics helps the credit union identify customers at severe financial risk. This involves a specific customer data cleansing ETL process and AI-driven descriptive natural language processing (NLP).

“We have more than 20,000 members with 1,700 data points each from various credit sources,” Anderson said. “We must properly manage that data down to ensuring there are no spelling mistakes. That allows us to build a model that identifies customers in financial trouble before things get bad. We can help customers avoid bankruptcy and find ways to improve their financial health—which is good for them and our business.”



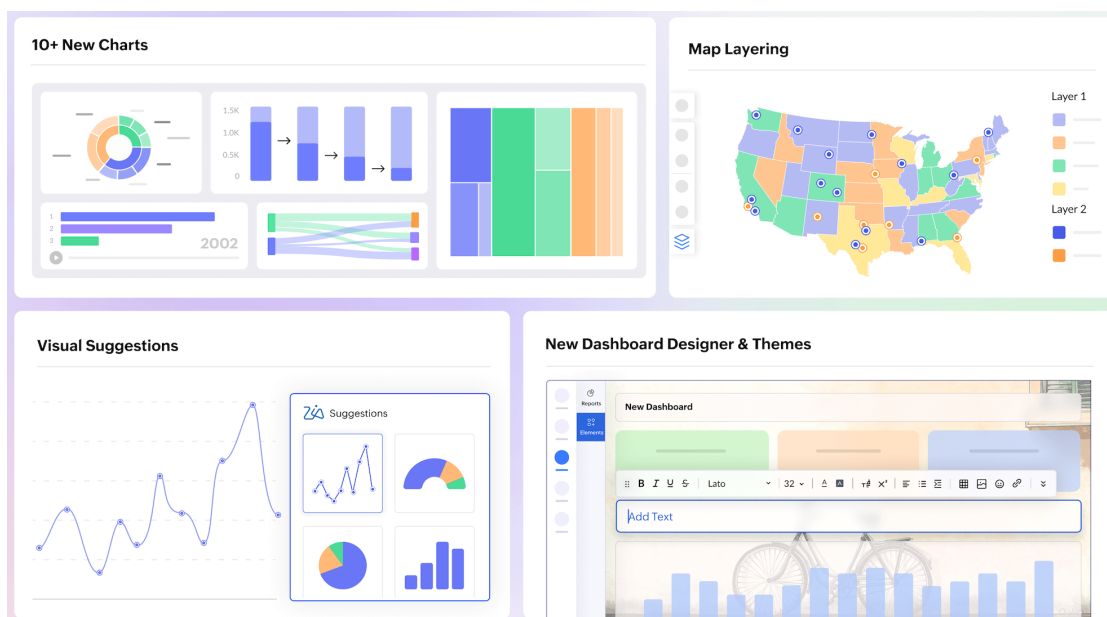
*Zoho Analytics provides executive dashboards that incorporate Zia AI, offering real-time insights to help executives anticipate challenges and opportunities. Image from Zoho.*

## VARIED USES ACROSS A RANGE OF ROLES

Zoho Analytics serves a diverse user base with varying needs and technical expertise. Business analysts leverage the platform’s advanced features, including the Data Science and Machine Learning Studio and the Zia AI assistant, to perform in-depth analyses and uncover valuable insights. Marketing teams track campaign performance and analyze customer segments, while sales managers monitor key metrics like conversion rates and customer lifetime value. IT administrators ensure data integrity and maintain security with access controls and audit logs.

Executives use customizable dashboards and Zia Insights to gain a high-level overview of KPIs, explore contextualized information, and understand the “why” behind the numbers. Anderson, the Integris IT executive, configures dashboards for his senior leadership team that allow them to drill down into customer acquisition and retention data.

“We track age, demographics, and other factors to understand why people are joining or leaving the credit union,” he said. “The dashboards present this data clearly, even to those who aren’t tech-savvy, so our executive team can easily spot trends and make strategic decisions.”



*With its Visual Data Pipeline Builder, Zoho Analytics enables users to create data pipelines with a simple drag-and-drop interface. Image from Zoho.*

## INTERCONNECTIVITY WITH THE ZOHU ECOSYSTEM

Zoho Analytics integrates with Zoho's suite of business applications to provide a seamless experience and other benefits. Zoho Analytics offers a holistic view of the organization by connecting data from various sources, including CRM, marketing automation, finance, and HR systems. For example, a marketing team can integrate Zoho CRM data with e-mail marketing tool Zoho Campaigns, then use Zoho Analytics to diagnose an underperforming campaign, identify bottlenecks, and improve future strategies.

Zoho's open ecosystem allows the platform to scale with its customers. As businesses grow, Zoho adapts, which should eliminate the need to switch platforms. Integris Credit Union, which uses about 35 to 40 different Zoho apps, has realized the value of this scalability.

"Integration of the apps out of the box is of greater value than getting the app with the most features," Anderson said. He added that the "main challenge is prioritizing which parts of the extensive functionality to use." Integration with third-party tools like Microsoft Teams should also enhance communication and accessibility. A robust API enables custom integrations with other applications, and dedicated support teams assist larger organizations with scaling and optimization.

## FUTURE TRENDS AND ZOHU'S ROLE IN THE BI MARKET

The BI market is transforming significantly, driven by several key trends reshaping how organizations use data. Moor Insights & Strategy believes that Zoho is tracking well with the ongoing evolution of BI tools, which are becoming more accessible, integrated, and intelligent.

**AI and Automation:** The increasing integration of AI and automation enhances the capabilities of BI platforms. This includes augmented analytics, where AI and machine learning simplify data preparation, analysis, and visualization. Generative AI is becoming more prevalent, enabling more advanced analytics.

**Self-Service Analytics:** This trend empowers non-technical users to create reports and dashboards independently, reducing reliance on IT departments and fostering a data-driven culture. Zoho Analytics' intuitive interface and self-service features enable users to perform complex analyses without extensive technical expertise.

**Embedded Analytics:** Integrating analytics directly into everyday workflows and third-party applications is gaining traction. While Zoho Analytics offers robust integration capabilities, competing platforms such as Looker and Sisense are considered more advanced, and Zoho should continue to invest in this area.

**Cloud-Based Solutions:** The shift toward cloud-based BI solutions continues as organizations seek scalability and flexibility in data management. Cloud platforms offer on-demand access to BI tools, easily supporting collaboration and remote work. As a cloud-native platform, Zoho Analytics is well equipped to meet these needs.

**Real-time Collaboration and Mobile Access:** Businesses need to share insights instantly across teams, making real-time collaboration and mobile access to BI tools increasingly important. While competitor Domo is known for its mobile-first approach, Zoho is actively enhancing its collaboration features to address this demand.

## ZOHO'S BROADER ROADMAP AND STRATEGIC VISION

The latest Zoho Analytics update reflects the company's strategic vision for sustainable growth, which prioritizes innovation, resilience, and employee development over immediate financial gains. The company tailors its offerings to meet the needs of multinational clients—including enterprises—by focusing on performance, customization, and localized support. Zoho seeks to balance remote and in-office work environments while promoting strong local communities and economies, reflecting its commitment to social responsibility and long-term value creation.

Zoho Analytics' roadmap aims to advance its decision intelligence capabilities. Plans include developing a recommendation engine to offer actionable insights and expanding generative AI integrations to provide more options beyond OpenAI. Zoho looks to provide a more unified user experience by improving integration across its product suite, particularly in billing, revenue management, and tools for financial services. Zoho is also building on Zoho One, its unified business operating system, which now offers more than 50 integrated applications for various functional roles and industries. Together, Zoho Analytics and Zoho One aim to support informed decision-making and efficient operations across the Zoho platform.

Zoho Analytics is a scalable and affordable choice for growing companies, offering more functionality than many other low-cost options. Its future success will depend on how effectively the company addresses evolving trends and enterprise needs shaping the BI landscape. With its AI-powered functionality, intuitive interface, cloud-native platform,

and strong security and data governance features, Zoho Analytics is well positioned to scale with industry needs. However, Zoho should continue enhancing its capabilities in areas such as embedded analytics and real-time collaboration to remain competitive with more specialized platforms.

Zoho Analytics has evolved into a robust and accessible BI platform, democratizing data analysis through AI-driven features and a user-friendly design. Its competitive pricing and seamless integration within the Zoho ecosystem make it a compelling choice for businesses of all sizes. While some competitors may offer more specialized features in specific areas, Zoho Analytics stands out for its comprehensive approach, empowering users across various roles to make data-driven decisions. By continuing to innovate and adapt to the evolving BI landscape, Zoho is poised to become a significant force in the market, helping businesses unlock the true potential of their data.

## IMPORTANT INFORMATION ABOUT THIS PAPER

### *CONTRIBUTORS*

[Mel Brue](#), Vice President and Principal Analyst, Modern Work

[Robert Kramer](#), Vice President and Principal Analyst, Enterprise Data Technologies, ERP, and SCM

### *PUBLISHER*

[Patrick Moorhead](#), CEO, Founder and Chief Analyst at [Moor Insights & Strategy](#)

### *INQUIRIES*

[Contact us](#) if you would like to discuss this report, and Moor Insights & Strategy will respond promptly.

### *CITATIONS*

This paper can be cited by accredited press and analysts but must be cited in-context, displaying author's name, author's title, and "Moor Insights & Strategy". Non-press and non-analysts must receive prior written permission by Moor Insights & Strategy for any citations.

### *LICENSING*

This document, including any supporting materials, is owned by Moor Insights & Strategy. This publication may not be reproduced, distributed, or shared in any form without Moor Insights & Strategy's prior written permission.

### *DISCLOSURES*

Zoho commissioned this paper. Moor Insights & Strategy provides research, analysis, advising, and consulting to many high-tech companies mentioned in this paper. No employees at the firm hold any equity positions with any companies cited in this document.

### *DISCLAIMER*

The information presented in this document is for informational purposes only and may contain technical inaccuracies, omissions, and typographical errors. Moor Insights & Strategy disclaims all warranties as to the accuracy, completeness, or adequacy of such information and shall have no liability for errors, omissions, or inadequacies in such information. This document consists of the opinions of Moor Insights & Strategy and should not be construed as statements of fact. The opinions expressed herein are subject to change without notice.

Moor Insights & Strategy provides forecasts and forward-looking statements as directional indicators and not as precise predictions of future events. While our forecasts and forward-looking statements represent our current judgment on what the future holds, they are subject to risks and uncertainties that could cause actual results to differ materially. You are cautioned not to place undue reliance on these forecasts and forward-looking statements, which reflect our opinions only as of the date of publication for this document. Please keep in mind that we are not obligating ourselves to revise or publicly release the results of any revision to these forecasts and forward-looking statements in light of new information or future events.

©2025 Moor Insights & Strategy. Company and product names are used for informational purposes only and may be trademarks of their respective owners.