

# ZOHO BUSINESS PULSE

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## Getting to **better** **business** process management

Scale your business operations,  
optimize your customer experience,  
and improve data collection across  
your organization.

### FEATURE:

Three CRM automations to  
improve process management  
across your organization

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### ASK AN ACCOUNT MANAGER:

Which CRM integration has had the  
biggest impact for customers?

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### CASE STUDY:

How ABA Advisors upgraded from  
spreadsheets to custom apps



# About Business Pulse

**Z**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

Looking back over the last decade of rising customer acquisition costs, it's clear that the market is teaching business leaders a valuable lesson about the importance of customer experience and retention. Although we've seen skyrocketing acquisition costs moderate somewhat since their peak in 2021, sustainable long-term growth is still dependent on extending and improving the customer lifecycle, rather than just chasing after the next new lead. As such, more and more CX leaders are embracing a comprehensive and forward-thinking approach to engagement, from first awareness to conversion and beyond.

Building a relationship with your customer requires contextual, personalized, and consistent crossdepartmental processes. If your organization fails to deliver that consistency, buyers will take their business to a competitor. To boost customer retention and, in turn, lifetime revenue, teams must be able to

understand, anticipate, and address consumer needs in a way that feels timely and authentic.

This also requires a commitment to consistent messaging, service quality, and responsiveness. In other words, you must now consider the customer experience in terms of a complete, interconnected journey, rather than a series of individual touchpoints, each managed by a different department head.

However, all of that is easier said than done. With so many moving parts and departmental stakeholders, creating a truly coordinated end-to-end customer experience is only possible with deeply integrated systems and advanced metrics across marketing, sales, and support. Only by breaking down organizational silos can leadership position individual teams to have profound impacts on broader customer success.

That's why the Account Management team recommends you take a critical look at the customer touchpoints and processes that power your organization. From there, you can identify which ones are in sync with broader company objectives, and refine or eliminate the ones that aren't. This kind of audit also exposes how data moves, or fails to move, across your organization. Of course, the Zoho AM team is ready to help you kickstart this process, or offer suggestions on optimizations to be made along the way.


Schedule a call with an Account Manager

| ASK AN ACCOUNT MANAGER |

# “In the last year, which **integration** has created **the biggest impact** for **Zoho CRM users?**”

★ ★ ★

**Zoho’s Account Management team focuses on helping organizations grow the value of their CRM implementation.** Because they play such an active role with larger customers across every industry, we asked them which integration makes the biggest impact on a typical CRM implementation.

Julie’s answer:  Zoho Sign

“Once a contract has been sent out, your sales team has little insight into what’s happening on the customer’s end. The Sign integration with CRM changes that, providing fine-grained data about everything from the number of times the contract was viewed to whether it has even been opened.



**Julie Doris**  
Account Manager

## About the CRM integration with Zoho Sign

**Collecting** signatures introduces new friction points at the most critical stage of the sales process. Delays in sending quotes or incomplete documentation can create further bottlenecks and complications. With the Zoho Sign extension, sales teams get detailed updates about every document’s status.

The Sign extension makes it easy to build and send customizable templates pre-populated with data from CRM. As documents are signed, they are linked to the contact’s record and visible inside their CRM profile. In cases where contracts are expiring or incomplete, workflow rules can trigger reminder notifications. And with built-in reporting capabilities, it’s possible to capture and optimize every step (online and off) of the signing process.

Jen’s answer:  Zoho Books |  Zoho Projects

“The integrations with Books and Projects make a significant impact on the accuracy and speed of invoicing. Bills are automatically generated and sent as soon as the job is done. Invoices are more precise, and get paid faster.




**Jen Loney**  
Account Manager

## About the CRM integration with Books and Projects

As sales cycles grow longer, they grow prone to revenue leakage. This takes many forms: sales teams under charging; under-billing caused by inefficient timekeeping processes; hours wasted capturing data from disparate systems for invoicing. Opportunities for loss abound.

The integration between Zoho Books, Projects and CRM streamlines the complexities the cause revenue leakage. When a sale closes, a new project is created, associated with the customer profile, and forwarded to the service team. One-click timekeeping in Projects precisely captures how (and how much) time is spent. After immediately updating in CRM, a detailed invoice is created. And with the Books and Projects integrations, all of this information is visible within the associated CRM profile.

Jonathan’s answer:  Zoho DataPrep

“Boosting data quality unlocks a world of possibilities. When your data is precise and easily digestible, it empowers businesses to unearth deeper, more relevant insights. This is where DataPrep truly shines.



**Jonathan Hantsbarger**  
Account Manager

## About the CRM integration with DataPrep

**Comprehensive** high-quality data plays a pivotal role in informed decision-making. Duplicate records, erroneous entries, and disorganized or unclassified data undermine the integrity of information across the board. However, integrating Zoho DataPrep with Zoho CRM makes it easy to filter, cleanse, and enrich all data before synchronization or import. Furthermore, DataPrep is an effective tool for

replicating and safeguarding CRM data, guaranteeing consistent updates and preserving data lineage.

Beyond enhancing data quality and management, DataPrep profoundly impacts how data is presented and comprehended. Report creation is streamlined with an array of one-click transformation functions, while AI and ML-powered features—such as sentiment analysis, language identification, and keyword extraction—add depth and context to datasets.



## | CRM SOLUTION HIGHLIGHTS |

# Powerful automations to improve process management

Are you getting the most out of Zoho CRM? Improve customer-facing and backend business processes with Wizards, Blueprints, and CommandCenter.



**As companies grow, bringing structure and automation into business processes is absolutely critical. Business leaders agree.**

**A**ccording to the 2023 World Economic Forum's "Future of Jobs" Report<sup>1</sup>, a third of all business-related tasks today are performed by machines, with survey respondents forecasting that up to 65% of information and data processing will be automated by 2027. Respondents to the WEF survey expect data entry jobs to decline by more than 8% over the next three years—higher than any other category—a trend that is backed by ILO Occupation Employment statistics. Over that same period, 80% of executives plan to accelerate their drive toward automation, a strategic priority second only to investments in on-the-job training (81.2%).

While this shift will have massive impacts on nearly every industry, there are things business leaders can do to accelerate adoption without sidelining their reps. Rather than thinking of automation as a replacement for human labor, look instead for opportunities to implement machine-assisted business processes. Automation isn't only a matter of digital transformation; it's about rethinking how employees and systems engage, and finding ways to optimize for both.

In this installment of **Zoho Solution Highlights**, we'll explore how you can streamline key processes to increase data quality, improve compliance, and mandate best practices without the need for manual oversight. CRM features include:

 **Wizards**

 **Blueprint**

 **CommandCenter**

<sup>1</sup>. <https://www.weforum.org/publications/the-future-of-jobs-report-2023/>



# Wizards

MULTI-STEP FORM BUILDER FOR MORE MANAGEABLE AND MODULAR DATA INPUT

Break complex lead forms into a step-by-step sales interface for more accurate data capture.

PROBLEM

Collecting customer data is both complicated and error prone

► **The** more information you ask your customer-facing reps to collect, the less likely it is that all of your records will be both complete and correct. Depending on your industry or business model, reps may need to collect a long list of data over the course of several conversations or sessions. This process becomes even more complicated and unreliable if a rep must verify the customer’s information using third-party systems outside of your native CRM interface.

Not only are these information-intensive conversations more prone to transcription errors and lost data, but they also require more training and oversight. Forcing entry-level reps to fill out long and complicated forms diminishes employee experience, ultimately decreasing satisfaction and increasing churn.

SOLUTION

Transform a complex record creation form into a series of modular screens

► **Rather** than presenting reps with a generic record creation form with dozens of fields, the Wizards feature can break larger forms into a clear sequence of focused and contextual screens. This simplified interface displays only those fields that are relevant at each step of the process, automatically streamlining and customizing which fields appear based on the data being provided throughout the call. As data is entered, pre-defined follow-up activities—such as third-party data validation—can be triggered automatically before reps move to the next section or activity. Additionally, system admins can add key instructions or call scripts to the wizard, guiding even the newest reps, step by step, as they complete their first calls.



**SCENARIO: Car loan officer evaluates an applicant**

An embedded CRM widget allows the loan officer to look up a potential borrower’s credit score live on the phone without having to navigate to another screen. Depending on the result, the agent is directed to different workflows for capturing additional information, directing borrowers to alternative loan options, or closing the file.



**SCENARIO: Home insurance agent gathers data to initiate coverage**

A home insurance agent must fill in several dozen fields in order to provide rate quotes. Some of these fields may require information that the homeowner does not know off the top of their head. Rather than delaying the application for days or weeks as the homeowner checks their records, the agent may advance the application through the early stages of the process using the partial data that the homeowner can provide in the first call.

More accurate and complete records and a better work experience for employees

► **The** Wizards feature provides sales teams with a streamlined, clutter-free user experience, and leads to more complete, usable CRM records. By mapping management’s process expectations into the CRM itself, it provides managers with a high degree of confidence that all their agents—no matter how experienced—know what to do and say at every step of the record creation process. The result is less friction and greater success at every step of the customer journey.

Not only does the Wizards feature improve the overall quality of your CRM data, but it also transforms the day-to-day conditions for your entire team. New reps become more productive more quickly, and experienced reps expend less effort in their daily work, increasing the likelihood that they’ll stick around for the long term.

Check out our video series offering advice directly from Zoho’s AMs

Short videos on how to get the most out of Zoho CRM, including:

- ◆ Implementation best practices
- ◆ CRM data hygiene
- ◆ Powerful features in CRM
- ◆ Reporting and business analytics



Watch videos





# Blueprint

DRAG-AND-DROP PROCESS BUILDER FOR A MORE REPEATABLE AND SCALABLE PIPELINE

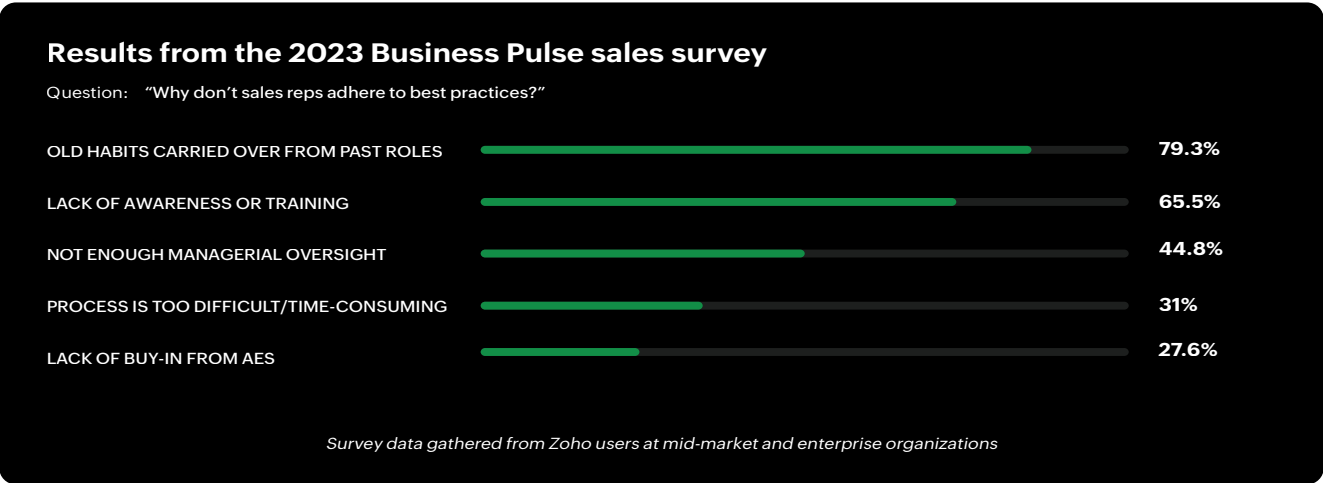
Standardize your team processes to deliver consistent CX and measurable outcomes.

PROBLEM

Each lead is treated in a slightly different way, making consistency and tracking possible

► **Zoho CRM** provides your sales teams with the tools for success, but often, more is needed to ensure your teams use these tools correctly and consistently. After all, even the most optimized sales process is only as effective as the sales

reps who follow it. In highly complex sales processes, making sure information is collected, entered, and acted upon in the proper sequence is critical. Ensuring compliance with sales policies and practices can quickly become a micromanagement nightmare as teams scale and mature. But when adherence is inconsistent, the data story is fractured, and leadership’s understanding of the funnel (and everything it touches) is incomplete.



SOLUTION

Map processes into CRM and ensure each step is completed before progressing

► **Blueprint** is a drag-and-drop sales process builder that actively guides each rep through the precise steps of the sales process for each lead. As a deal moves from one stage to the next, a prompt directs the rep to complete required actions, per designated sequences and within set timelines. Only upon the completion of each task can the lead move to the next stage, ensuring the sales process progresses according to the conditions set by the sales manager. In this way, you can bring the consistency, scalability, and reliability of automation to your human-centric team processes.

Although Blueprint is housed within your CRM, it can also be used outside of a strict sales context. This feature is highly effective for managing post-sales or internal processes that are critical to the operation of your team or business.

OUTCOME

Map processes into CRM and ensure each step is completed before progressing

► **Blueprint** brings QA into sales. Formalizing the essential elements of good customer engagement makes it easier to onboard and train new hires, and gently guide more seasoned reps to follow new, centrally defined sales strategies. Each stage of the process can be tested, measured, revised, and deployed without requiring time- and energy-intensive retraining. This solution allows the team to iterate quickly while still guaranteeing every rep creates a positive and consistent sales experience from the lead’s first engagement to their last.

Standardizing sales processes with Blueprint brings coherence and completeness to organizational data. That clarity offers leaders a more precise, real-time picture of the company’s health, giving sales leaders—and any other interested stakeholders— the ability to forecast sales performance more reliably and accurately.



SCENARIO: Sales refocuses on larger CXs

Leadership decides to retool the sales process to better serve their growing number of upmarket leads. This will require a more complex engagement cycle with different stages than the sales team is accustomed to. Rather than spending months retraining their account executives on the new process—and then monitoring for adherence long-term—the sales manager deploys an upmarket-specific blueprint.

This new modular process contains all of the tasks and qualifications for advancing larger prospects through the funnel. In a matter of seconds, every sales rep on the team knows what’s expected of them with this new sales strategy. Sales leadership can focus on more nuanced aspects of selling to larger customers—such as positioning and strategy—rather than the minutia of processes, tasks, and timelines.



ROBERT PECK

Vice President of Business Development, Load Delivered Logistics.

“With Blueprint, we can plug in new sales reps as quickly as we plug in new customers. Standardizing the sales process has made our long-term growth strategies much more sustainable.”





# CommandCenter

END-TO-END BUSINESS PROCESS MANAGEMENT BUILDER FOR COMPLEX, CROSS-TEAM COORDINATION

## Oversee multi-team BPM across critical business systems all from within Zoho CRM

### PROBLEM

**Processes that span multiple teams and IT systems are difficult to manage and impossible to measure**

► **The** number of interrelated processes involved in successfully converting and retaining each customer dramatically increase as your business operations scale. From marketing outreach, to sales engagement, to product delivery, to service fulfillment, and beyond—a single customer journey will touch multiple teams and business systems. This makes seamless coordination more difficult as the complexity of your offering grows.

While each individual step in the journey can be automated with discrete workflows, this piecemeal approach increases the chance that key tasks will fall through the cracks. What's more, because these activities are decentralized—across modules within your CRM, teams within your organization, and products within your IT stack—you have no easy way to identify and resolve bottlenecks that may be negatively impacting customer experience or reducing operational efficiency.

### Results from the 2023 Business Pulse sales survey

63%

of respondents are dissatisfied with cross-team collaboration at their org

90%

of respondents rank their org as average or below average when it comes to leveraging cross-team BI

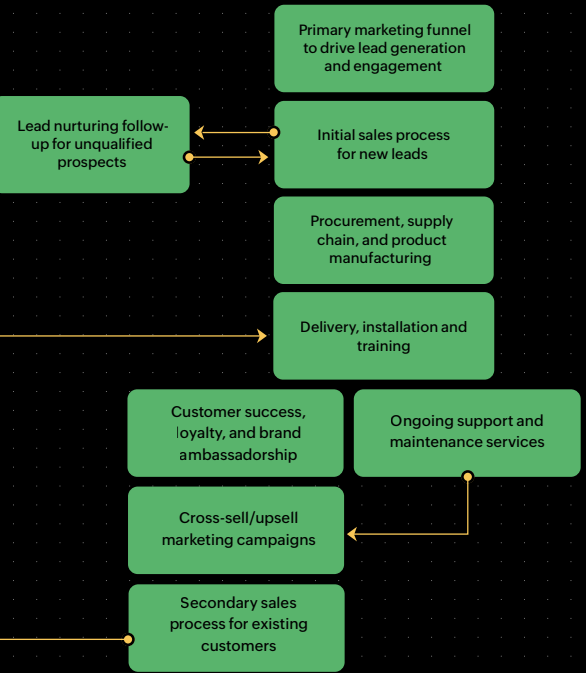
Survey data gathered from Zoho users at mid-market and enterprise organizations

### SOLUTION

**Unify, orchestrate, and monitor all stages of your critical business processes inside Zoho CRM**

► **CommandCenter**—Zoho CRM's in-app, low-code BPM builder—offers sales and operations teams a centralized interface to build, standardize, and optimize the full customer journey. Although Zoho CRM offers other ways to automate core sales activities—such as workflow rules and blueprints—these basic automations can only affect data within a single CRM module. Connecting discrete processes and triggering actions in other apps usually requires custom code or unintuitive technical workarounds. With CommandCenter's simple, visual process builder, teams across your organization can unify and coordinate their efforts inside CRM, making it easier to monitor the overall health and efficiency of your business operations.

### SCENARIO: Large custom solar systems for commercial properties



### OUTCOME

**Identify and eliminate bottlenecks across your organization for more efficient process management**

► **With** CommandCenter enabled, all of the diverse processes that make up a particular end-to-end customer journey can be knitted together into a clearly-defined sequence, ensuring the hand-off from one stage to the next is transparent, reliable, and consistent every time.

A programming expert shouldn't be required to write custom scripting whenever a new multi-module or multi-app process is introduced. With CommandCenter, a less technical CRM admin or sales manager can quickly map

and deploy most complex, branching processes, coordinating activities across different teams and software platforms. This flexible solution makes it easy to plan out fully automated, human-driven, or hybrid processes inside Zoho CRM, other Zoho apps, or third-party software systems.

Regardless of where a particular stage of the customer journey is ultimately housed, CommandCenter provides a single view from which the entire operation can be managed, monitored, and refined. Teams can see precisely how many leads are in each stage as well as the average time each stage takes to complete. With this information in hand, leadership is better able to identify process inefficiencies, high-churn stages, understaffed teams, and gaps in coverage.

## ZOHO CASE STUDY



### How ABA Advisors went from spreadsheets to custom apps

Cross-app automation and easy customizations helped ABA bring their entire workflow into the Zoho ecosystem.

#### WHO IS ABA ADVISORS?

**F**ounded in Knoxville, Tennessee in 2011, Accountants and Business Advisors, LLC (ABA) provides business advisory services, including tax minimization strategies and propitiatory cash flow services for long-term financial planning. ABA consistently achieves 10–15% in organic growth year-on-year, largely due to their successful word-of-mouth referral program within their target industry segment of physicians, dentists, veterinarians, and small businesses.

#### WHAT PROBLEMS LED ABA TO ZOHO?

ABA Advisors was using outdated software, relying on manual work in spreadsheets and PDFs for even the most basic processes. Monthly billing required manually copying information from project sheets into the legacy accounting system, while annual fee adjustments took more than a month of manually updating client fees across multiple products and spreadsheets.

The scale of data entry (and re-entry) during a project's lifecycle was placing significant strain on operational capacity. With data kept in different products and spreadsheets, data siloes emerged and created communication gaps and bottlenecks. This limited visibility into the status of projects, meaning staff were frequently interrupted to provide updates both to internal and external parties. This lead to more disruption and delays, and ABA started to see churn increase almost as quickly as growth.

ABA needed a solution to address three core challenges:

1. Bridging internal and external communication gaps
2. Reducing manual workloads through automation
3. Building frictionless handovers across the entire business process



**Robert Craig**  
COO at ABA Advisors

**"We were really siloed and restricted in growth. We were growing, but we had a larger and larger number of clients we couldn't serve efficiently."**

#### WHAT SOLUTION DID ZOHO PROVIDE?

With the help of implementation partners, ABA constructed a custom CRM, project management, and invoicing system on top of Zoho's larger technology ecosystem. The cross-app automations between Zoho CRM, Zoho Projects, the Zoho Finance Suite, and Zoho Analytics provided a seamless flow throughout the customer life cycle.

By retooling Zoho CRM's Deals module and integrating it with Zoho Projects, ABA set a trigger such that every time a lead converted or an existing customer added a new service, a new project is automatically created from a library of service templates. The templates are then populated with key information and assigned to the professional services team.

ABA's manual billing process has been streamlined through automation. As soon as a project is marked complete, a workflow in CRM pushes it to the monthly billing report. The Billing team then drafts an invoice directly from the report, and pushes it to either Zoho Books or Zoho Subscriptions for automated billing. Custom Analytics dashboards keep everything moving in sync. If issues or delays occur, notifications are triggered to prompt quick resolution.

**"We created a series of dashboards that give managers and directors a top-level overview of where we stand with every project. No other software gave us this level of visibility."**

**Robert Craig**  
COO at ABA Advisors

#### WHAT BENEFITS DID ABA EXPERIENCE?

ABA's digital transformation has been a huge success. In the first three years since implementation, customer count grew from 600 to over 3,000, with annual revenue up 37.5%. Zoho has improved hundreds of processes across the company, with automations boosting productivity by over 150%. And by leveraging Analytics and workflows in the Finance Suite, the annual price adjustment now takes one day rather than 6 weeks.

The combination of data centralization with better tracking systems have improved ABA's service quality and accuracy, customer experience and retention has gone up, and the number of issues caused by miscommunications has gone down. And as advisors have spent less time fixing problems, they can assume a more proactive role in advising clients, even while managing a higher client load. "We're always thinking about the long term and where we want to head. Our systems are now set up for scale." Craig continues, "rather than scrambling to fix immediate pain points, we can focus on strategic initiatives to drive future growth."

**In the first 3 years of their Zoho Implementation, ABA saw:**

**150%**  
Increase in productivity

**37.5%**  
Increase in ARR

**97%**  
Decline in manual data reconciliation





| Ana Acosta, North American Partner Network |

## IN FOCUS

# THE ZOHOO PARTNER NETWORK

**If your Zoho instance requires extensive customization and configuration but your organization lacks the time or in-house expertise to manage it internally, you can turn to Zoho's network of authorized resellers. The technical experts of the Zoho Partner community offer professional services ranging from implementation assistance and custom app building to training and ongoing product support.**

**Q: When you say "implementation partner" a lot of people will think of initial software setup. But what about when someone wants to update a live Zoho solution? For our readers who are already using Zoho, how can an implementation partner help keep key business systems running while rolling out new processes and features?**

**Ana:** In a lot of ways, customizing a new app is easier than updating a working system. Once the software's live, the margin for error gets a lot slimmer and mistakes can have big consequences. This is where working with a partner really helps. They have the business expertise to suggest the best solution and the technical expertise to ensure your software is set up correctly from the get-go. Although Zoho's apps can be customized by an in-house IT team, working with someone who's done it all before can eliminate a lot of guesswork and failed experiments.

**Q: Selecting the right partner is obviously really critical to a successful implementation project. Do you have advice for people as they start looking? Are there any criteria they should keep in mind?**

**Ana:** Of course, if you're looking for guidance, speaking with a Zoho Account Manager is a great first step. They know all of the solutions Zoho offers, and they can suggest a couple partners that might be a good fit for your particular industry and requirements. That said, even if you decide to consult someone at Zoho, I still recommend doing a bit of research yourself. After all, you know your business needs better than anyone else.

For this, try digging into our Partner Directory. There you can see the top applications each partner sells and services, as well as their reviews from past implementations. And if they have any Zoho Product Certifications, it means they have been trained to deploy and scale that product by our experts at Zoho.

**Q: Do you have any advice during the negotiation process with a partner? Are there things you should make sure you get pinned down before signing on the dotted line?**

**Ana:** "Culture fit" is probably one of the most important things to look for. Be up front with any prospective implementation partners about your expectations as a client and the kind of collaboration you're seeking. By leading with that kind of transparency, you're likely to end up with a partner that matches your style and work process. Once you've picked a partner, fine-tune the details around timelines, payment schedules, solution hand-off, and ongoing support dynamics. And be sure to settle on the metrics that define success. Getting to the best solution often takes time, so it's important that everyone has a grasp of the desired outcomes, and how they'll be measured.

**Q: Once the implementation is underway, what can people do to increase the likelihood that the project will be a success? What's the best way to engage with your implementation partner?**

**Ana:** Consistent communication is key. Designate a single point person on your team to engage with the partner and relay information so everyone stays in the loop. I'd also recommend discussing communication frequency as part of the conversation about timelines. That doesn't mean the partner should agree to reply to every message immediately, but it's good to set expectations from the start. Scope creep is another big issue that customers need to bear in mind. You can add requirements as necessary, but just remember that the more you add the longer it will take and the more it will probably cost. This is a big reason to document ahead of time the project's end goals and the steps needed to get there.

**Q: What about when the partner is ready to transfer the solution to your internal IT team? Any tips for the hand-off?**

**Ana:** The most important thing you can do to make the hand-off as smooth as possible is end user testing. Not just after development is done but consistently throughout the implementation process. By doing that, you're ensuring the real needs and preferences of the ultimate users of the system are being met, not just what you imagine they want. If you've done that, then the only real challenge is training. Your partner should offer training sessions, either with entire team or with a select set of internal trainers who can then spread the information more widely.

That said, go beyond just basic training. Make sure there are at least a couple people inside your company who understand how the system has been built, backwards and forwards. Whether that's someone from your IT team or key members of the departments using the solution, make sure someone understands the technical backend enough to at least explain how the system works. Otherwise, you'll be left with a "black box" solution, which is a lot harder to manage and troubleshoot. The partner will be available to help if things go wrong, but you'll be in a much better position if one of your team members can take an active role in maintaining the solution when needed.

**Q: If existing users have further questions about the Partner Program, is there a way they can reach someone from your team?**








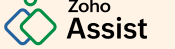
**Ana:** Most definitely! My team doesn't provide recommendations of particular partners, but we're happy to answer questions about the program. Just send us an email at [partner-support@zohocorp.com](mailto:partner-support@zohocorp.com).

# 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 extends far beyond CRM. From live website chat to supporting users after the sale, here are a few of our most popular apps for customer-facing teams.

 <b>Zoho SalesIQ</b>	Convert website visitors into paying customers with an integrated livechat solution.	 <b>Zoho Campaigns</b>	Nurture your leads with drag-and-drop email campaigns and track success with fine-grained analytics.
 <b>Zoho Survey</b>	Get a better understanding of your customers for more effective engagement.	 <b>Zoho Forms</b>	Use webforms to collect leads, or pre-populate forms with customer data for a better customer experience.
 <b>Zoho Bookings</b>	Automate scheduling, customize follow-up notifications, and say goodbye to no-shows.	 <b>Zoho Sign</b>	Send documents for digital signature and track progress across the entire signing process.
 <b>Zoho Desk</b>	Deliver contextual customer support across multiple channels from a single interface.	 <b>Zoho Assist</b>	Remotely troubleshoot customer software issues and resolve support requests more quickly.









## BUSINESS INTELLIGENCE & PROCESS MANAGEMENT

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

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

## PRODUCTIVITY & COLLABORATION

Bring communication onto a single platform and prevent data from being siloed in disparate messaging apps or project management tools. These fully integrated apps keep conversations moving across every channel.

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

 <b>Zoho Books</b>	Handle every aspect of accounting and drill-down into the health of your business.	 <b>Zoho Invoice</b>	Build customized invoices that align with your brand, and automate bill delivery based on project status.
 <b>Zoho Expense</b>	Simplify employee expensing with mobile receipt capture, OCR, and one-click reporting.	 <b>Zoho Inventory</b>	Move to a centralized invoice management system flexible enough to serve every sales channel.



Schedule a call

Interested in discussing the other **software solutions** available from **Zoho**?

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

# What's up next for Zoho Business Pulse?

Check out our next issue focused on how Zoho Analytics is helping businesses uncover inefficiencies, spot opportunities for innovation, and grow the value of their data. By automating key data capture, cleansing, and transformation processes, Zoho Analytics reduces many of the typical barriers to entry that prevent data-driven decision-making.

With Zoho Analytics integrated into your tech stack, data analysis is democratized. Building reports and identifying actionable insights is no longer siloed among data scientists or developers. With Zoho's AI-powered insights, users are guided toward the right focus areas and the best way to present the data story.

## Zoho experts and analysts will present on:

- ✓ A preview of the Zoho Analytics roadmap
- ✓ Advice for better business intelligence from Zoho's account managers
- ✓ Integrations that can expand the power of Zoho Analytics
- ✓ An interview with Zoho's Professional Services team

Get your copy of Zoho Business Pulse and learn how organizations can foster a culture of data through BI platforms like Zoho Analytics. When its easy-to-use visualization and modeling features are paired with GenAI-based enrichments, the result is more useable, more valuable data across the organization.



## Looking to get more from your Zoho implementation?

Keep an eye out for **Zoho Business Pulse**.

