



Zoho  
**Partners**

# How to Work with a Zoho Partner

Hello there! Thank you for visiting our website.  
If you're here, you're likely looking to work with  
one of our Partners. The intent of this document  
is to help you work effectively with a Zoho Partner.



[zoho.com/partners](https://zoho.com/partners)

## Who is our Partner?

Zoho Partners are businesses authorized to resell Zoho subscriptions and/or provide consulting services, help customers evaluate, customize, implement Zoho solutions and provide continued support services.

## Is it necessary for you to work with a Zoho Partner?

If you are not fully sure why you should work with a Zoho Partner, the following statements should help you decide:

- You feel Zoho can help your business but you are unsure which application would fit your requirements.
- You are unsure what percentage of your requirements will be met by a specific Zoho solution and if the rest can be addressed by customizing the solution.
- You are unsure if you have sufficient capacity in house to implement and customize the chosen Zoho product.
- You require hand-holding during the entire process from selection of the product to implementation, user education, and post-implementation support.
- You do not have the necessary expertise required to integrate your system with multiple in-house/external systems.
- You are looking to migrate from an existing system to Zoho but you do not have the in-house expertise to execute it securely.
- You require someone to guide you/your organization to make the best use of Zoho products.
- You or someone on your team knows all of the above, but do not have the required bandwidth.

If you agreed to any of the above statements, you should explore working with a Zoho Partner. A Zoho Partner can be the one-stop shop that you require to optimize Zoho's capabilities and improve your chances at a successful implementation.

**While Zoho offers 55+ SaaS applications, every customer need is unique. You and your business may need a customized approach to get the best out of Zoho. This is where Zoho Partners step in.**

# How to choose and work with a Zoho Partner

All our Partners listed in the [Partner Directory](#) are authorized to resell the products they specialize in. This section will guide you in selecting the Zoho Partner that may best fit your need.

## Before you begin, here are a few points you should keep in mind-



- 1.** A Zoho Partner is an independent business that provides services on top of Zoho products.

---
- 2.** Customers get into an independent service agreement with the Zoho Partner to determine the scope and conditions of their services.

---
- 3.** Zoho will not be a party to the agreement between the customer and Zoho Partner.

---
- 4.** Zoho will also not be a party to any conflict or disagreement that takes place between a customer and a Zoho Partner.

---
- 5.** Zoho does not have visibility or control over a Partner's service charges.

## Step 1

### ● Document your Expectations

Clearly document your expectations from the Partners and the Zoho Products and what you seek to accomplish through this Partnership. You can also list a few non-negotiable attributes that you are looking in a Partner to help you make a quicker choice.

## Step 2

### ● Partner Suitability Check

Below are a few other areas you can analyze the listed Partners in to narrow down on the most suitable one:

- **Geographical Location** - If you need localized assistance, make sure to check if a Partner provides services in your location. Such Partners are also typically knowledgeable about local business practices.
- **Customer Service Language** - If you have specific service language requirement, make sure to check if the Partner provides services in the language that you require.
- **Partnership Status** - Zoho Partnership has three levels- Authorized, Advanced, and Premium, each level higher than the previous, with the highest being the Premium Partnership level. Partner tier status represents a Partner's level of success in providing Zoho services and continued customer success.
- **Zoho Product Certifications** - Zoho provides training and certification opportunities for Partners across geographies, products, and languages. These certifications signify a Partner's capability and ability to scale. If the product certifications are not listed on a Partners profile, you should inquire about their certification status on the product you wish to engage them in.

- **Domain/Industry Experience** - A Partner's experience in the relevant industry is essential for them to understand the context of a business problem, and suggest, customize, and implement relevant Zoho products to meet your organization's needs.

For example, if you are looking to implement/optimize your HRMS process, working with a Partner who has implemented HRMS in your industry segment will be fruitful.

- **Case Studies** - Most of our Partners have customer case studies listed on their profile in the **Partner Directory**. These case studies will give you an in-depth understanding of a Partner's capabilities and their approach towards implementation of Zoho products.
- **Customer Reviews** - Customer feedback is a great way to determine the quality of service provided by a Partner. You can go through the customer reviews and star rating on the Partner profile in the Partner Directory to make an informed decision.
- **Top Zoho Apps** - This section shows you the top Zoho application licenses that are sold and serviced by the partner and demonstrates their area of expertise.

Once you find a Partner that fits all your requirements, the next step is to engage with them.

### Step 3

## Engage with the Partner

You can get in touch with the Partner using the contact details provided on the Partner profile in the [Partner Directory](#) webpage. We recommend that you first prepare a clear business-requirements document and share it with the Partner. This provides clarity about what your business needs and what you seek to accomplish with the Zoho product implementation.

### Step 4

## Draw up a Statement of Work

You should not proceed further if you do not have a clear and mutually agreed/signed SOW in place.

If you are not sure about your requirements and their mapping to Zoho products, please engage someone to help you do this. A Zoho partner can specifically be engaged for this activity as well. They may charge for this on a consulting T&M basis. But do not proceed to the next step without a clear and extensive Statement of Work.

### Step 5

## Get Into the Service Agreement

Before commencing the project, it is important to have a clear understanding of the cost. If not completely specified while putting the SOW together, ensure that you know how it will be calculated and put together.

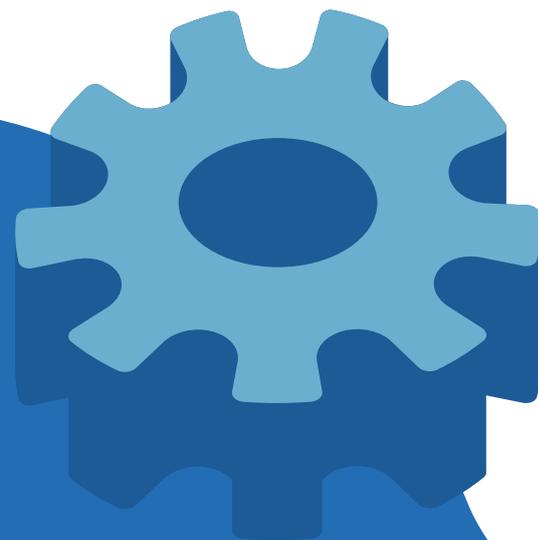
Please note that the implementation fee is decided by the Partner and agreed upon by the customer. Zoho does not have any authority over a Partner's fee or the implementation of the project.

Also, ensure you have an legally binding agreement with the Partner on the implementation cost, implementation timeline, payment schedule, refund policy, and other details. Zoho will not be responsible for services delivered against any such contract.



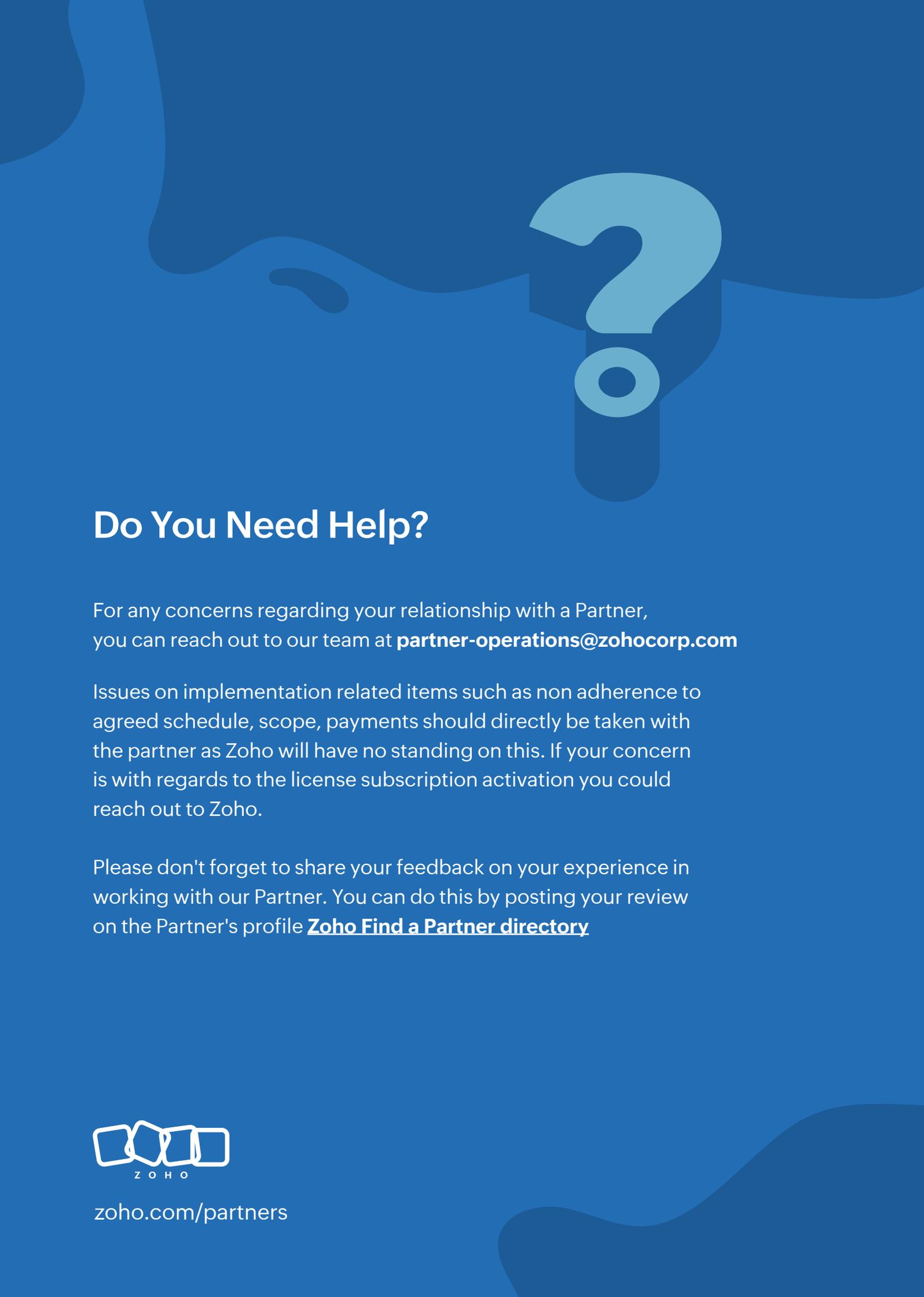
## Implementation Process

Once the implementation begins, we recommend that you ask the partner to walk you through the entire implementation. This would be appropriate time to flag any deviations from the SOW and have them adjusted right away.



## How Does Zoho Help with the Implementation?

In case a Partner encounters any issues with a Zoho product, our dedicated Partner support teams are accessible to Partners to help overcome these issues. They can share workarounds within a short term on real issues and work with products to address those. They also share best practices to follow if such a request is made.



## Do You Need Help?

For any concerns regarding your relationship with a Partner, you can reach out to our team at [partner-operations@zohocorp.com](mailto:partner-operations@zohocorp.com)

Issues on implementation related items such as non adherence to agreed schedule, scope, payments should directly be taken with the partner as Zoho will have no standing on this. If your concern is with regards to the license subscription activation you could reach out to Zoho.

Please don't forget to share your feedback on your experience in working with our Partner. You can do this by posting your review on the Partner's profile [Zoho Find a Partner directory](#)



[zoho.com/partners](https://zoho.com/partners)