



# Zoho Marketing Plus Integrated Marketing

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Zoho is a privately-owned technology company that was founded in 1996 as Adventnet, Inc. and has quietly evolved into an ambitious global player that serves the SMB and enterprise markets with cloud applications. The company offers a suite of more than 50 business, collaboration and productivity applications. These include applications for CRM, project management, finance, human resource management, analytics and support.

The company is headquartered in Chennai, India. It has eleven offices in India, five in the United States and has offices in Brazil, Canada, Mexico, Australia, Japan, Singapore, China, Egypt, South Africa, the United Arab Emirates and the Netherlands. Offices in France and Germany are in preparation. Zoho has more than 10,000 employees as of the end of 2021. It is present in 180 countries with more than 75 million users.

Zoho is led by its co-founder and CEO Sridhar Vembu. Being a privately held company, Zoho is not obliged to, and does not publish revenue or profit numbers. However, the company indicates a track record of profitable growth that is well in the double digits.

The company manages its growth organically, i.e. without acquisitions. All applications are built by Zoho, using one single hardware and software stack. They are deployed and delivered via Zoho owned data centers in the United States, Europe, India, China and Australia. Following this unique approach, the company has built a solid platform with a unified data model that allows it to grow and deliver software at high speed.

Core values of Zoho include corporate self-determination, privacy as a principle and a commitment to delivering high value.

## Zoho Marketing Plus

Zoho Marketing Plus is Zoho's suite of marketing tools. It is mainly based on combining existing Zoho products, including Zoho Marketing Automation, Zoho Campaigns, Zoho Social, Zoho Survey, Zoho PageSense, Zoho Webinar, Zoho Backstage and Zoho Analytics into one suite. With this suite, Zoho addresses mid-market companies with around 250 to 1,000 employees and a structured marketing organization with a progressively thinking leadership. It supports the CMO and their marketing teams doing their work from planning budgets via setting up multi-channel marketing projects or individual campaigns through their execution and analysis.

To accomplish this, Zoho Marketing Plus provides one unified environment for marketing teams that addresses most common concerns of CMOs and their teams. This shall enable the balancing of scale, impact and resources that is necessary for successful marketing.

Zoho Marketing Plus achieves this by allowing to collaboratively develop, change, execute and control marketing projects. It provides users with a view into the status of the end-to-end processes from ideation through to their execution via the Brand Studio, a Kanban-based user interface and execution dashboards.

Being built on the Zoho software stack, Zoho Marketing Plus offers unified customer data management. Based on this, the solution offers a shared view of the customer record. This record can be augmented with leads and contacts from various sources – Zoho or external ones.

To support the marketing process, Zoho Marketing Plus offers a digital asset repository that is based upon Zoho Workdrive.

Campaign orchestration and personalization are enabled by Zoho Marketing Automation and Zoho Campaigns. Zoho Campaigns also delivers a segment builder. Journey templates are delivered by Zoho Marketing Automation. Campaign templates can be used out of both applications.

The Brand Studio in Zoho Marketing Plus is the central switchboard to set up campaigns and marketing automation activities as marketing projects. It helps to plan the various activities based on about twenty-five possible marketing activities. These activities are placed on a timeline, sorted by their due date. For each marketing activity, tasks can get created and assigned to people. These tasks can be tracked via to-do lists, which can be sorted by status, marketing activity or task owner. The marketing project itself shows a high-level breakdown of tasks and their status per activity.

Being new to the market, Zoho Marketing Plus has been in a private beta with around 300 customers.

## Analysis

Zoho Marketing Plus is a young solution that targets at distinguishing itself in two ways. Firstly, it supports the complete marketing process, starting with the budgeting. Secondly, it makes it as simple as possible for the different stakeholders and roles to accomplish their objectives. Being based upon and integrating existing Zoho products that mainly complement each other, Zoho Marketing Plus offers quite strong collaboration, campaign management and marketing automation functionality, including good analytics capabilities. This is partly at the expense of the UI not being fully harmonized. Still, the offered user interface is slick and easy to handle.

What is particularly interesting is the way that the Brand Studio acts as a central switchboard for the creation and execution of campaigns. This includes the follow-up of tasks via to-do lists and marketing project internal discussions.

With this, the various user groups that are involved in creating and managing campaigns have an easy way into their tasks, be it the creation of an email for a campaign, the creation of target groups to be used with the e-mail, the creation of a multi-step and multi-channel campaign or campaign monitoring.

The Brand Studio is also the place where the connection to Zoho Workdrive is maintained. Zoho Workdrive acts as a simple asset repository. Although it is not a digital asset management system, Zoho Marketing Plus this way covers main asset management needs. These include particular asset organization, their retrieval and access control. Improved digital asset management capabilities are on the roadmap.

The combination of marketing activities, tasks, the asset repository and a task board in the Brand Studio is a powerful combination that greatly facilitates managing marketing projects end to end.

The template support for the creation of multi-step and multi-channel campaigns (called journeys in Zoho Marketing Plus), forms, e-mails etc. makes it easy for the marketers to create campaigns fast.

The journey builder in Marketing Automation and the workflow builder in Campaigns are strong tools to build marketing campaigns from simple to multi-step, multi-channel visually. The campaigns can be built using triggers and actions, with some of these actions being so-called end-of-journey actions. What could get improved is the creation of target groups. This process can gain from a visual, e.g. a waterfall modeler. In addition, Campaigns and Marketing Automation have an overlap. Reducing this would make it easier for the user to use Zoho Marketing Plus.

To budget for marketing campaigns, Zoho Marketing Plus inherits the marketing planner from Zoho Marketing Automation. The marketing planner is a simple yet interesting tool to plan budgets for marketing activities and to set attainable, non-monetary campaign goals. This enables success tracking via Zoho Analytics. Currently, it focuses on the short term by limiting the time span covered by a marketing plan to three months. It will also benefit from the already planned for integration of a marketing calendar to help marketing teams plan campaigns and then give an overview about which campaigns are active over time.

A capability that not many marketing tools have is the ability to do event management. Zoho Marketing Plus offers this via the integration of Zoho Webinars and Zoho Backstage into the suite. While not too well known, both, Zoho Webinar/Meeting as well as Zoho Backstage offer solid platforms for meetings, webinars as well as full-fledged events.

There is already a partial integration with Zoho Cliq. This gives an indication of future possibilities that are already on the roadmap for Zoho Marketing Plus.

Overall, Zoho Marketing Plus is a promising solution. It offers a wide range of functionality that marketers need for successful activities across channels.

## SWOT

### Strengths

- Integration of collaboration features as marketing is an inter-departmental team effort that needs close cooperation.
- Zoho Marketing Plus supports the end-to-end process from setting up marketing projects through their execution
- The Brand Studio which acts as a central switchboard for the creation and follow-up of marketing projects.
- Integration of event management via Zoho Backstage, Zoho Meeting and Zoho Webinar.

## Weaknesses

- No visual segment builder.
- No marketing calendar giving a detailed overview of activities that are planned over time. This is a roadmap item and to be delivered in the next 12 to 18 months.
- The left-hand navigation bar is geared towards the included applications as opposed to tasks that the users want to accomplish.

## Opportunities

- The marketing planner could benefit from extending the three-month period limitation, deeper integration into marketing activities and integration of finance systems to allow for plan versus as-is reporting.
- Integration of Zoho Projects to model the marketing projects instead of using an own version of a Kanban board.
- Arranging the left-hand navigation bar around the marketing project workflows and tasks instead of around applications.
- Automated creation of campaign/journey flows and corresponding target groups/segments based upon objectives with the help of ZIA.
- Integrating with Zoho Books and/or other finance software regarding planned vs. actual spend of campaigns to get an improved overview of the financial performance of campaigns

## Threats

- Zoho is not top-of-mind when it comes to marketing solutions. This can limit the ability to sell. This should be addressed by a strong Go To Market with active presence on relevant media.

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