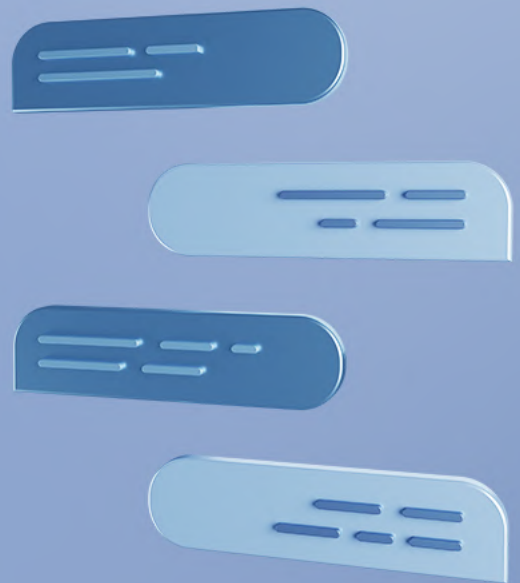




# AI-driven Business Optimization with Zoho CRM

Powered by Zia, Zoho's AI assistant



# Table of contents

<b>Ai in CRM</b>	4
<b>Zia for Zoho CRM</b>	5
<b>Data enrichment</b>	6
<b>Prediction</b>	11
Field prediction	11
Prediction analytics	14
<b>AI forecasting</b>	18
<b>Anomaly detection</b>	22
Workflow anomalies	22
Trend analysis	25
Anomaly detector	28
<b>Recommendation</b>	32
Recommendation builder	32
Recommendation analytics	36
Similarity recommender	40
Workflow suggestions	43
Owner assignment suggestions	46

Macro suggestions	49
Next best experience	52
<b>Communication</b>	55
Best time to contact customers	55
Best time to contact analytics	59
<b>Vision AI</b>	62
<b>Conversational AI</b>	69
<b>Email intelligence</b>	72
Email sentiment analysis	72
Email intent	76
Email emotion analysis	79
Activity extraction	82
Email summary	85
Competitor alerts	87
Autocomplete	91
<b>Upcoming AI Features</b>	94
Includes Voice of the Customer, Call Transcriptions, and more.	94
<b>Enrich your business operations with Zia</b>	95

# AI in CRM

The volume of data in today's world has increased manifold, and as a result has turned sales into a much more complex process. Most of this data is unorganized—further adding to the complexity. It's not only exhausting for sales reps to manage the vast volumes of data captured in their CRMs manually—the return on investment doesn't justify the time and effort spent on this activity. This has a negative impact on sales reps' productivity on other critical sales tasks.

Artificial intelligence has therefore emerged as a welcome respite for sales reps. AI-powered CRM systems provide sales reps with an array of valuable analytics and insights, and even perform many predictive tasks for them based on an analysis of patterns and trends. This provides enough room for sales reps to focus on more important sales tasks that can boost their business yield. Zoho CRM also strives to provide admins, managers, and sales reps with the best data-handling capabilities through its AI assistant, Zia.

# Zia for Zoho CRM

Zia is Zoho's AI assistant that optimizes your CRM data through data mining and machine learning to deliver key business information such as sales predictions, recommendations, alerts, data enrichment, voice of the customer insights from various channels, anomalies, forecasting, conversational AI, and more.

Zia saves you time by reducing the need for manual effort and mitigating the risk of unintended manual errors, and therefore improves your data-handling capabilities and helps you understand your customers' needs and behaviors so you can deliver personalized customer experiences. Let's now take a close look at Zia's various features and how they can help your business.

# Data enrichment

## Why care about data enrichment?

There might be times when you don't have sufficient data about a lead or a contact. Elementary details like name and email address might not be of much help. But your leads and contacts might have online profiles, such as social media accounts, company listings, or websites.

You might also receive emails from your leads or contacts with signatures in them. These signatures might contain some useful data such as job titles, designations, web addresses, contact numbers, social media handles, and so on. Having access to and capturing such details could equip you with valuable lead or customer information. This is data enrichment.

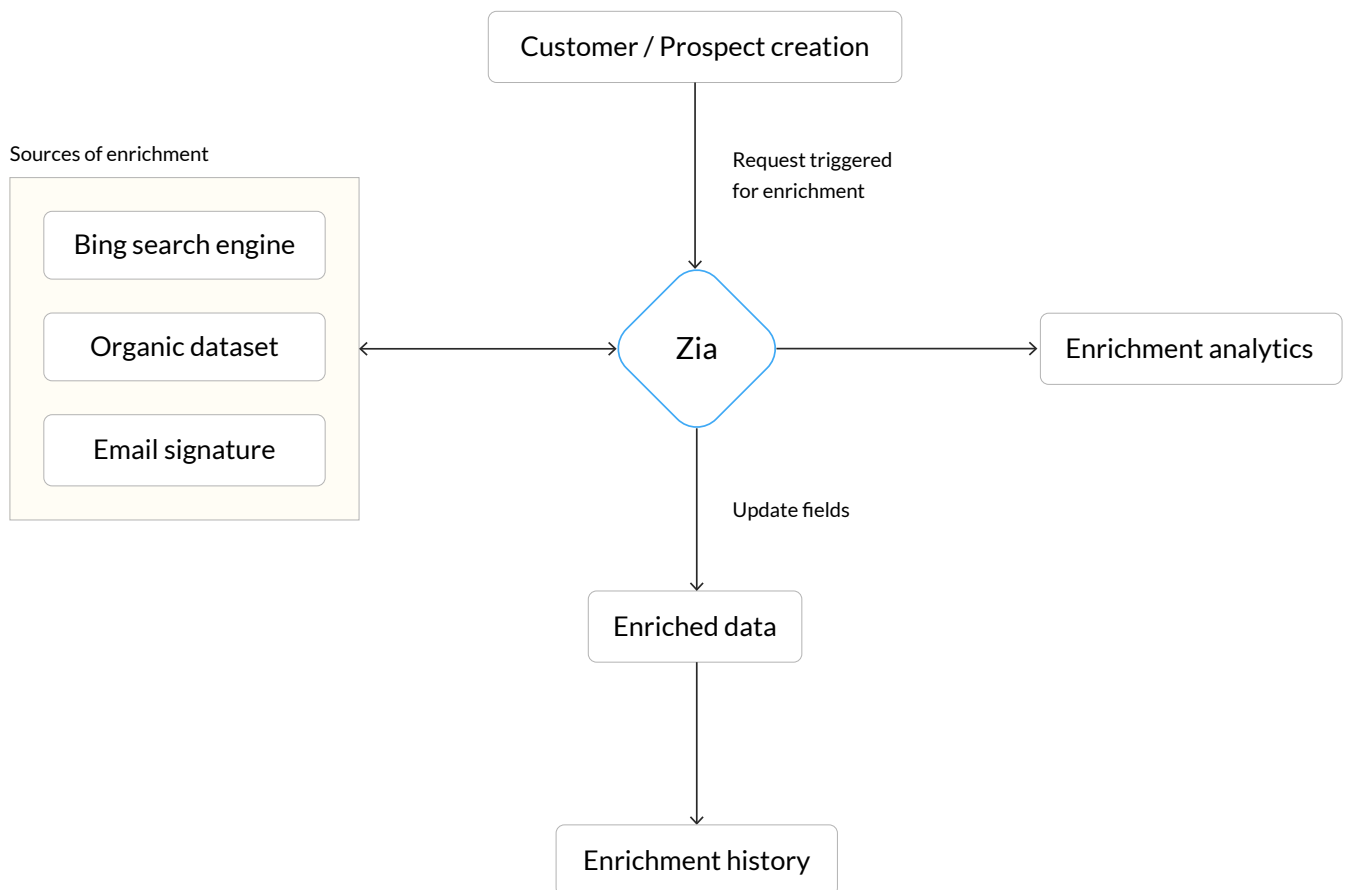
## Data enrichment in Zoho CRM

In Zoho CRM, Zia seeks and retrieves additional information about your records from the internet based on primary information you've provided, which enhances your CRM data quality by minimizing the possibility of incorrect or incomplete CRM data, and thereby helps your sales reps understand and serve prospects' needs better.

It also derives useful data from email signatures and captures them in your CRM account for leads, contacts, and accounts. Some of the important details that Zia can capture include email address, website, contact number, company name, social handles, designation, company location, address, and so on.

## How it works

The flow diagram below depicts how you can use data enrichment in Zoho CRM:



## Example scenario 1

Imagine you have a lead for whom you only have basic details, like name and email address. Let's say Zia fetches you information such as the lead's location, phone number, and social profiles, as shown in the screenshots below. You can use these data to analyze various aspects that impact your business.

**Create Lead** Standard ▾ **Enriched data available**

Company Morlong Associates Website  
 First Name Mr ▾ James LinkedIn Profile  
 Phone Twitter @  
 Country

**Data Enrichment by Zia**  
 Zia has discovered the following data related to the Company "Morlong Associates".

Zoho CRM Fields	Value	<input type="checkbox"/> Update	Enrichment Value
Company	Morlong Associates	<input type="checkbox"/>	Morlong Associates
Phone		<input checked="" type="checkbox"/>	400-666-8800
Country		<input checked="" type="checkbox"/>	USA
Website		<input checked="" type="checkbox"/>	https://www.morlongassociates.com
Twitter		<input checked="" type="checkbox"/>	morlongassociates

**Create Lead** Standard ▾ Cancel Save

Company Morlong Associates Website https://www.morlongassociates.com  
 First Name Mr ▾ James LinkedIn Profile linkedin.com/company/morlongassociates/  
 Phone 400-666-8800 Twitter @morlongassociates  
 Country USA Facebook Profile facebook.com/morlongassociates

Update Lead

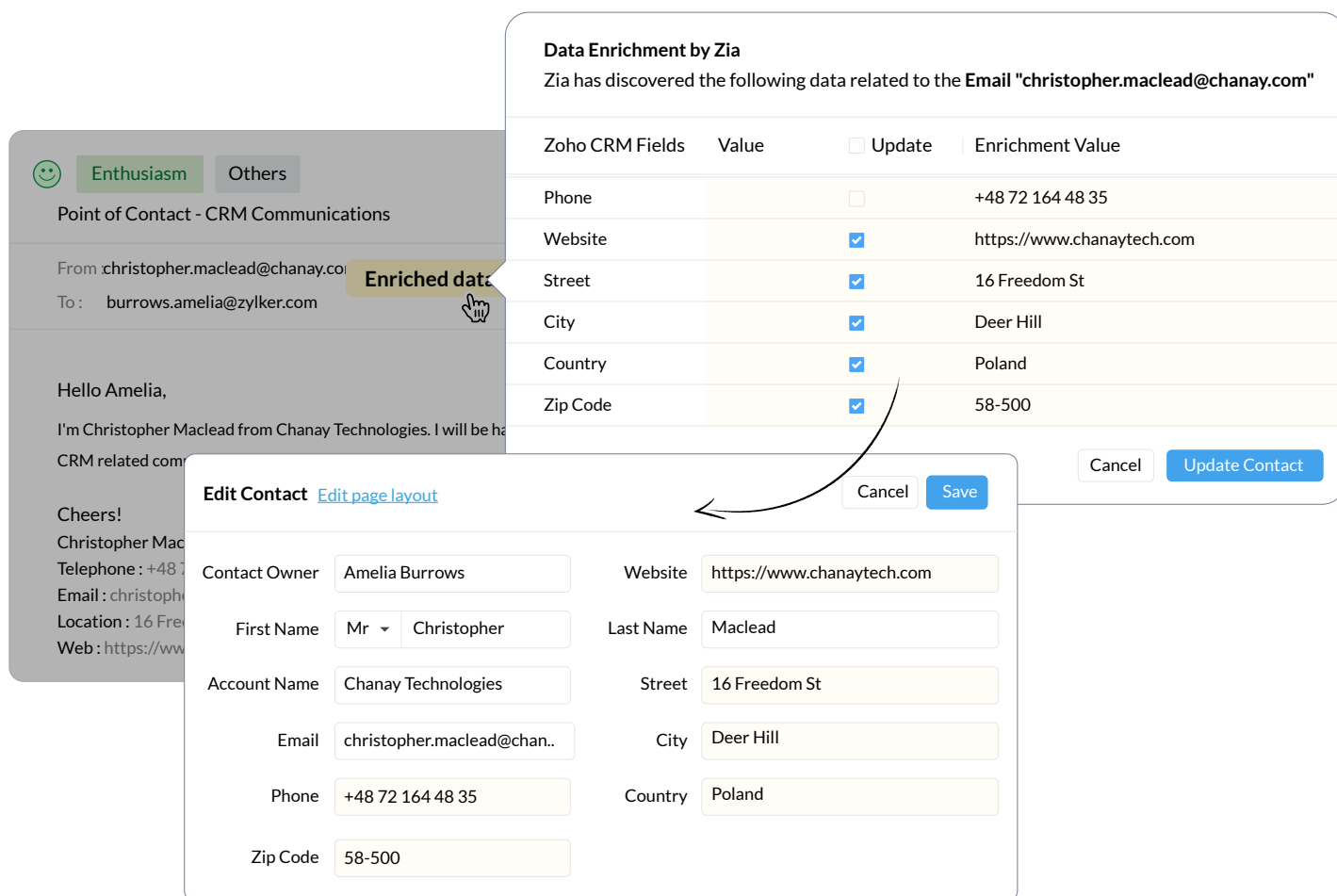
For example, using the location data, you can analyze factors such as your market presence in that region, your competitors there, your chances of beating out your competitors to capture the lead, and so on.

The fields for which Zia fetches information are called the enrichment fields—in this case, the lead's location, phone number, and social profiles. These fields provide you with a clearer picture of the various factors you might need to consider before you decide on necessary actions.



## Example scenario 2

Let's say one of your customer companies has assigned a new point of contact for CRM-related communications. The new contact sends you an email informing you of this change. In the email, the new contact has also included his email signature.



The screenshot illustrates a workflow in Zoho CRM. On the left, an email from Christopher Maclead (christopher.maclead@chanay.com) to Amelia Burrows (burrows.amelia@zylker.com) is shown. The email content includes a greeting, a message about a new point of contact, and a signature with contact details. A yellow callout box labeled "Enriched data" points to the email signature. On the right, a "Data Enrichment by Zia" popup is displayed, showing a table of discovered data related to the email address. The table lists Zoho CRM Fields, their values, update checkboxes, and enrichment values. Below the table are "Cancel" and "Update Contact" buttons. At the bottom, an "Edit Contact" form is open, showing the contact details for Christopher Maclead, with fields for Contact Owner, First Name, Last Name, Account Name, Email, Phone, Zip Code, Website, Street, City, and Country. A curved arrow points from the "Update Contact" button in the enrichment popup to the "Save" button in the "Edit Contact" form.

**Data Enrichment by Zia**  
Zia has discovered the following data related to the Email "christopher.maclead@chanay.com"

Zoho CRM Fields	Value	<input type="checkbox"/> Update	Enrichment Value
Phone		<input type="checkbox"/>	+48 72 164 48 35
Website		<input checked="" type="checkbox"/>	https://www.chanaytech.com
Street		<input checked="" type="checkbox"/>	16 Freedom St
City		<input checked="" type="checkbox"/>	Deer Hill
Country		<input checked="" type="checkbox"/>	Poland
Zip Code		<input checked="" type="checkbox"/>	58-500

**Edit Contact** [Edit page layout](#)

Cancel Save

Cancel Update Contact

**Contact Owner** Amelia Burrows **Website** https://www.chanaytech.com

**First Name** Mr Christopher **Last Name** Maclead

**Account Name** Chanay Technologies **Street** 16 Freedom St

**Email** christopher.maclead@chan.. **City** Deer Hill

**Phone** +48 72 164 48 35 **Country** Poland

**Zip Code** 58-500

Since this contact is new, you won't have his details in your CRM. You could manually collect and enter the details in your CRM, but since the contact has included his signature in the email, you can instead use Zia's email data enrichment feature to capture the contact details from his signature.

## Bottom line

- ✓ Comprehensive and accurate data
- ✓ Personalized customer journeys
- ✓ Improved response time and quality
- ✓ No redundant data
- ✓ Valuable lead and customer data captured from email signatures

## Resources

To learn more about how to configure data enrichment in Zoho CRM, please review the documentation below:

- ✓ [Data enrichment - help documentation](#)
- ✓ [Data enrichment for emails - help documentation](#)

# Prediction

## Field prediction

### Why make predictions?

In order to make certain business decisions, it's important to know how certain modules in your business are likely to perform. Though it's not possible to determine exactly how things will turn out, predicting the most probable outcome can still help you arrive at better decisions and pro-actively implement the appropriate measures.

To make predictions for your organization, you would normally need to run through countless CRM records and fields, gather relevant data points, analyze and identify patterns, and then arrive at predictions through inference. Manually doing this is a daunting task—and also highly susceptible to errors. This is where Zia's field prediction can help.

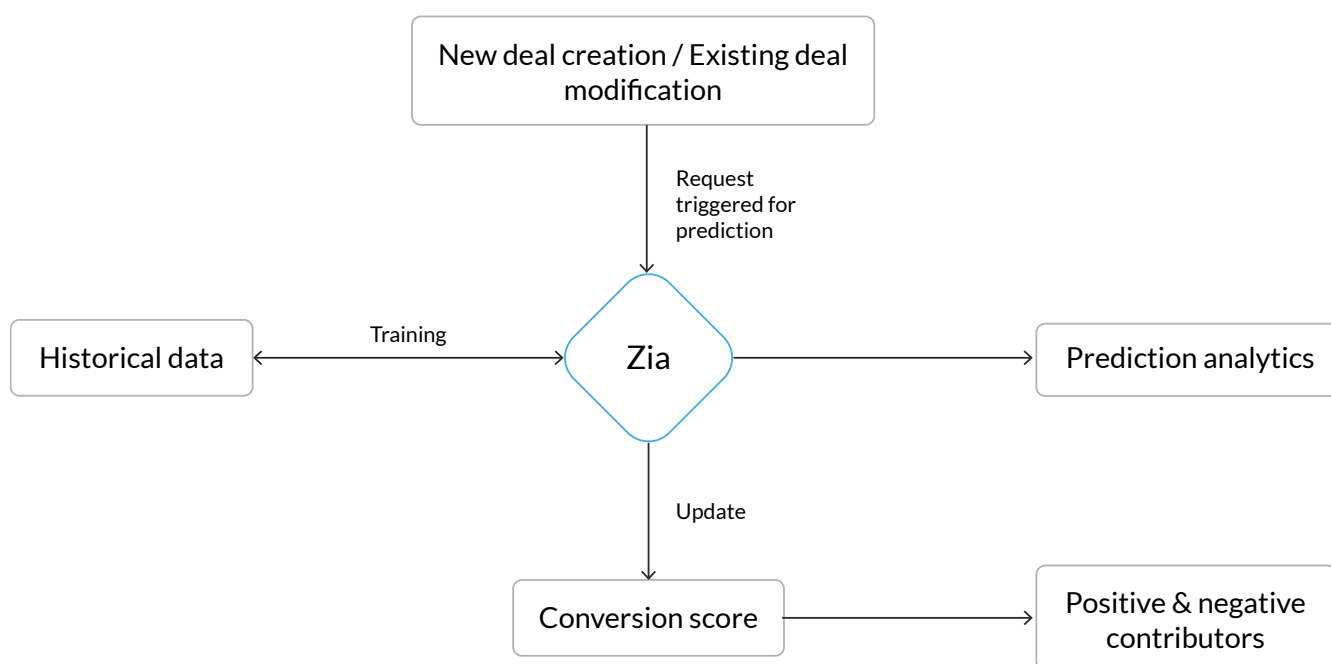
### Field prediction in Zoho CRM

Zoho CRM's field prediction enables you to build custom predictions that align with your business requirements. This simple and intuitive builder can quickly predict values for various business metrics, such as the likelihood of winning or losing a deal, the expected revenue from it, the likelihood of a user buying a specific product as part of the deal, and more—based on a selected field.

Zia studies your data according to the conditions you specify and generates predictions. These predictions provide you with better insights to plan or modify existing sales and marketing strategies.

## How it works

The flow diagram below depicts how you can use field prediction in Zoho CRM:



## Example scenario

Let's say you run an insurance company. You've recently introduced automotive insurance to your services and want to predict the likelihood of customers buying this new service. In the Deals module, you have a field named "Insurance type" and "Automotive insurance" as one of the options under it. You can generate a prediction for this field so you can determine how your automotive insurance service would perform overall and the appropriate business strategies to achieve it.

Prediction Analytics

### Create New Prediction

Prediction Name **Automotive Insurance**

Select Module **Deals**

What do you want to predict? **Insurance Type**

Within Insurance Type which option(s) you want Zia to predict? **Automotive** Select Values

Negative values **Term** **Health** **Accident Cover**

Which records should Zia use for learning?

① Deal Stage is Closed Won Closed Lost +

**Prediction**

Insurance type

**Automotive** Score 80

**Insurance type prediction**

😊 **Positively contributing field**

- Car IDV
- Tenure
- Third-party coverage

😞 **Negatively contributing field**

- Claim status
- Age of vehicle

## Bottom line

- ✓ Customized predictions
- ✓ Insights on potential strategies
- ✓ Build predictions for any standard or custom module

## Resources

To learn more about how to configure field prediction in Zoho CRM, please review the documentation below:

- ✓ [Field prediction - help documentation](#)

## Prediction analytics

### Why analyze your predictions?

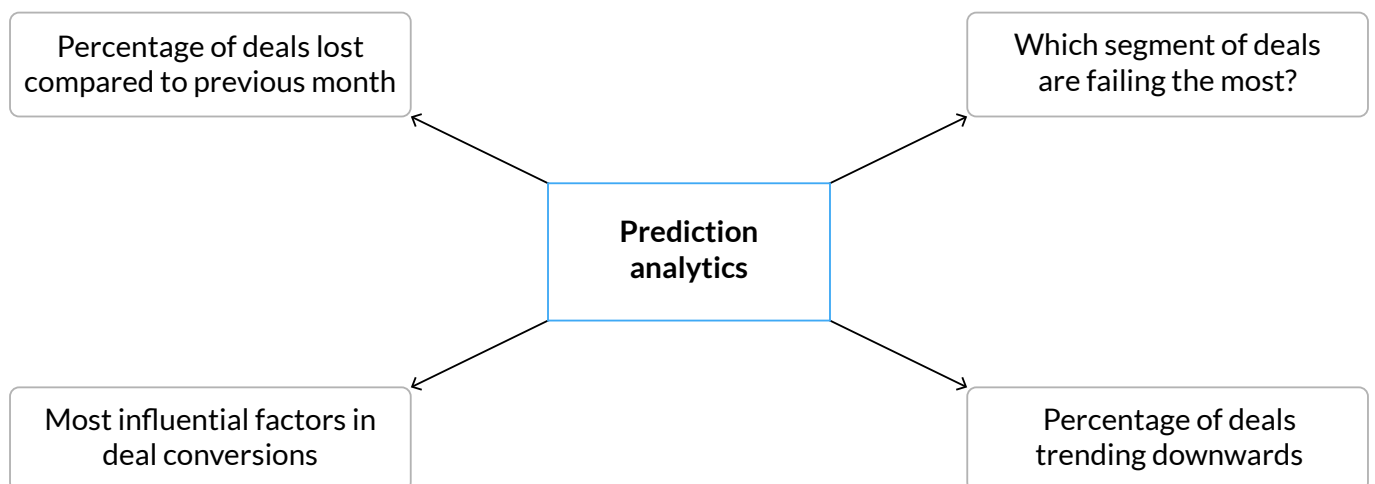
While you may have used predictions to understand customer needs and market trends better, you might not really know which factors Zia considered while generating them. You might also need to know how accurate the predictions were and which actions might be necessary—if any.

### Prediction analytics in Zoho CRM

Zia's prediction analytics feature displays the data that was used as input to predict an outcome, such as the number of active predictions, prediction accuracy, the number of records involved in active predictions based on probability range, the number of records that uptrend or downtrend, and a time-based graphical representation of prediction accuracy over various periods of time and across various record owners. These analytics help you identify segments where the performance and quality of predictions are unsatisfactory so you can address them accordingly.

## How it works

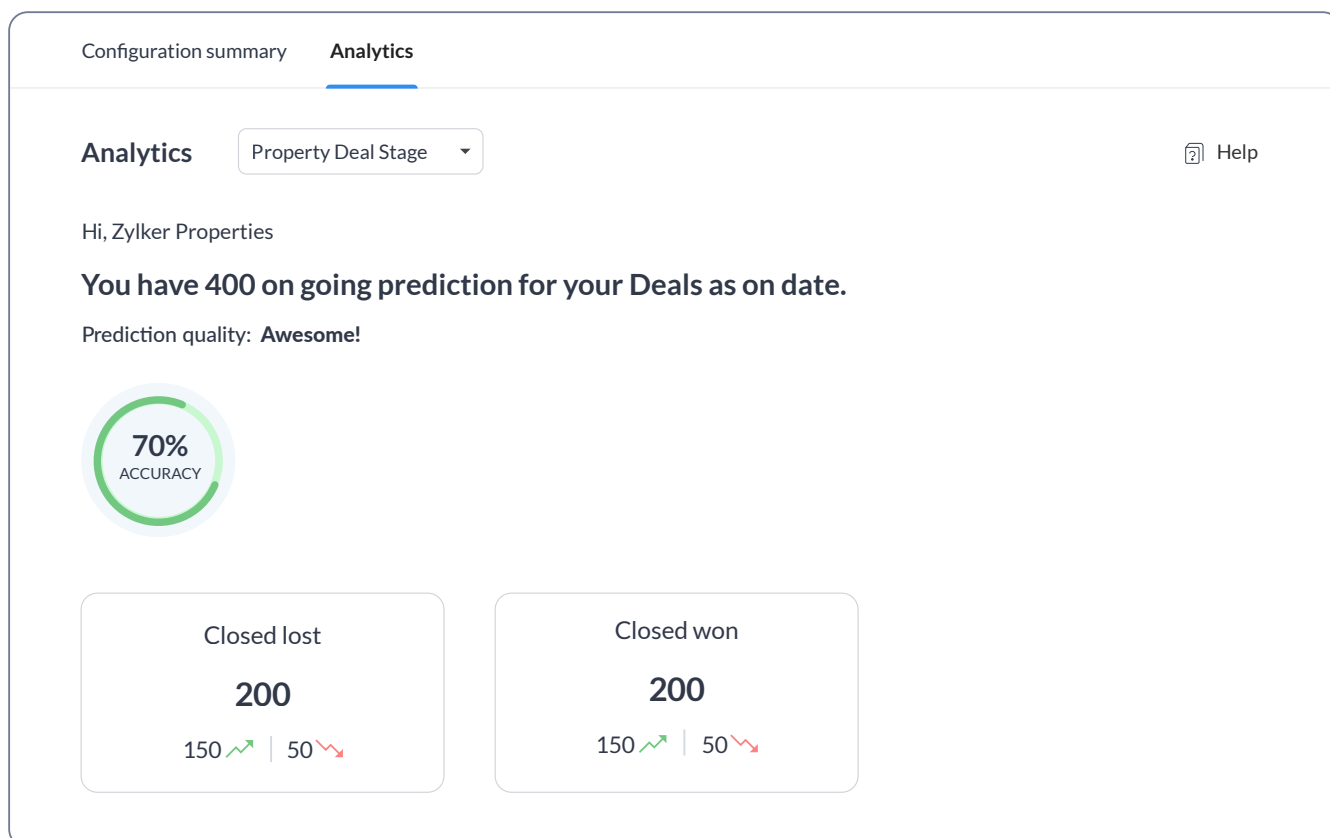
The flow diagram below displays some of the analytics that prediction analytics in Zoho CRM provides you with:



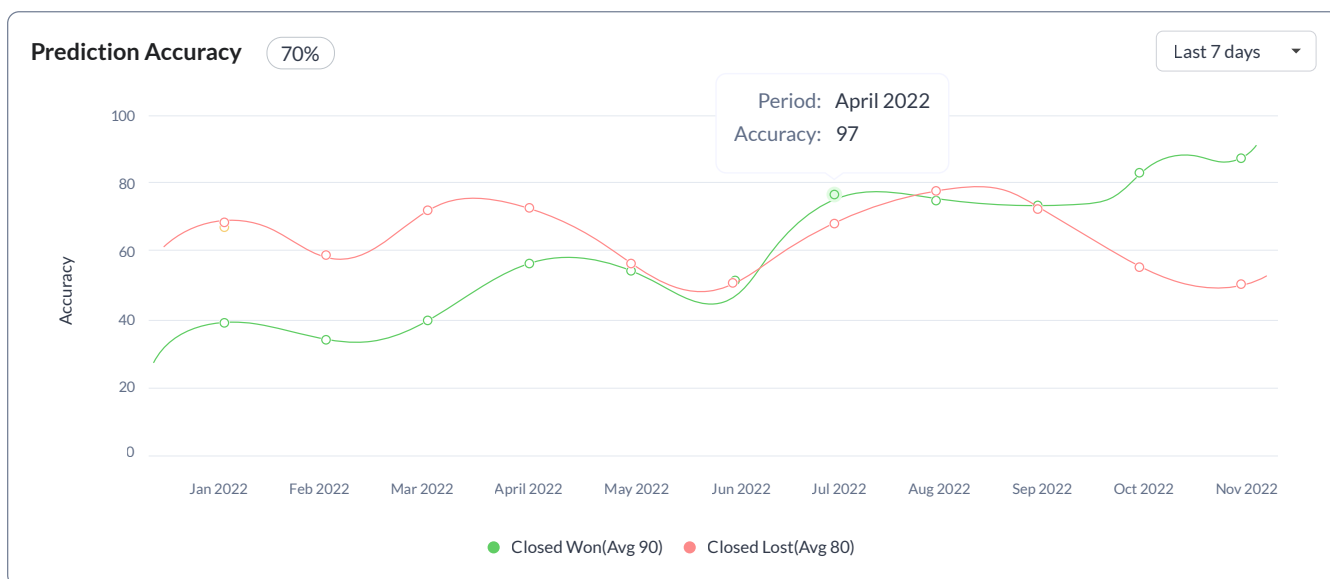
## Example scenario

Let's say you run a real estate firm. You have your property deals listed in your Deals module and have created a prediction for the "Stage" field to determine which properties have the best chances of closing. The prediction provides you with the necessary insights for deal closure.

The prediction analytics feature states how accurate the prediction is, among various other performance insights. This helps you validate its accuracy and quality so you can decide on further courses of action as required.







## Bottom line

- ✓ Identify factors that impact predictions
- ✓ Measure prediction performance and quality
- ✓ Understand sales rep impact on customer

## Resources

To learn more about how to configure prediction analytics in Zoho CRM, please review the documentation below:

- ✓ [Prediction analytics - help documentation](#)

# AI forecasting

## Why would you need AI forecasting?

Sales forecasting helps you estimate how your sales will fare in the upcoming quarter, fiscal year, or month, so you can design business plans accordingly. To achieve an efficient forecast, it's important to set targets that are realistic and productive at the organizational, team, and individual levels.

To devise optimal goals for your individual sales reps, you need to consider many different factors, such as each rep's past performance, geographical location, and so on.

But manually analyzing and assigning targets to each rep would be tedious. Thankfully, Zia helps you avoid unnecessary busywork with its target achievement predictions for forecasts.

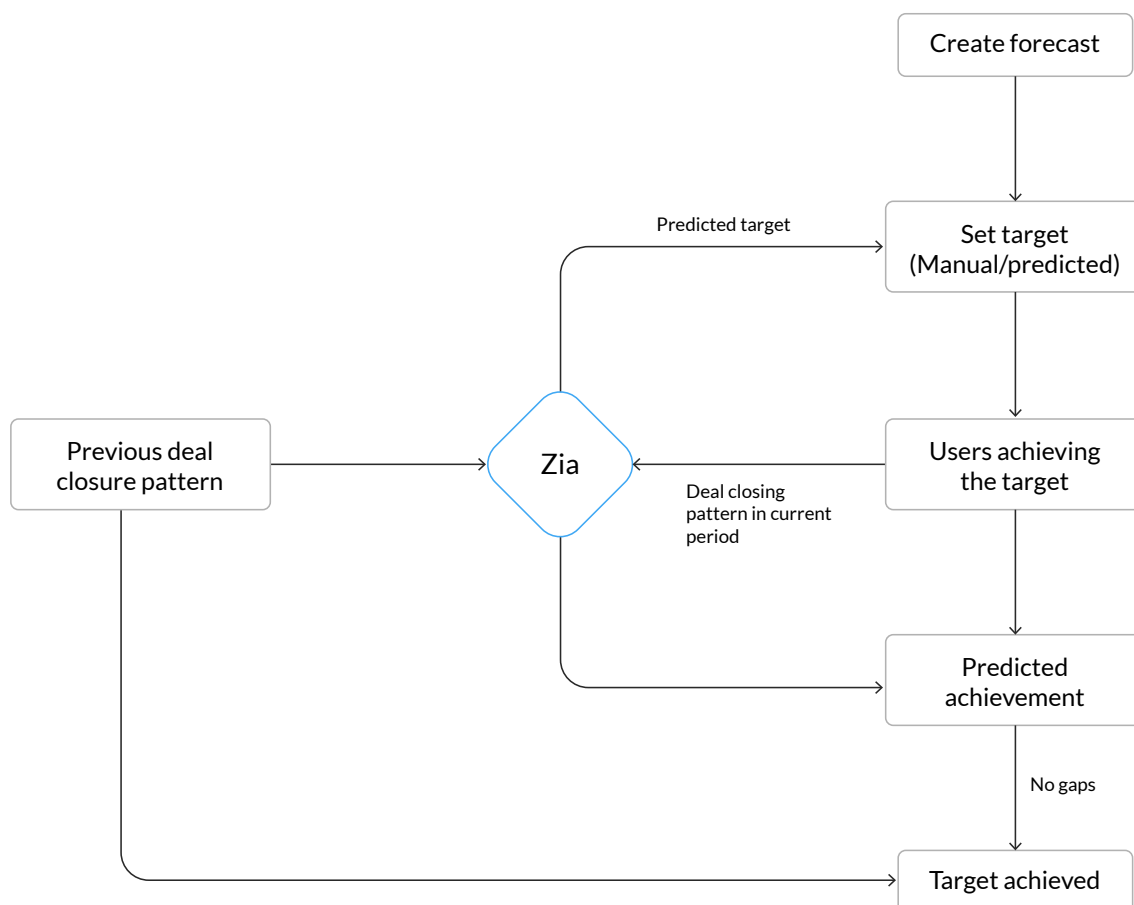
## AI forecasting in Zoho CRM

Using predicted target functionality, Zia suggests optimal targets for individual users and roles in the current forecast period, based on targets achieved and deal closure patterns from previous forecasts. For example, if the past trend suggests that a rep usually achieves more than the set target, Zia can predict an ideal target for the rep that he is likely to achieve. As part of the predicted achievement functionality, Zia predicts how much an individual user or a team is likely to achieve in the current forecast period based on targets achieved and deal closure patterns from both previous and current forecasts.

For predicted targets and achievements, Zia uses the past six months of data, requiring that the closing date of the achieved deals be across 10 different dates in order to conduct the analysis. It also provides you with a target achievement report consisting of an individual's target, achievement, and open deals, which indicates the rep's progress so you can analyze how close or far they are from achieving their target. In cases where reps are unable to meet their predicted targets by the end of the forecast period, Zia uses the results to understand the gap and adjust the target values for the next continuous forecast created.

## How it works

The flow diagram below depicts how you can use AI forecasting in Zoho CRM:



## Example scenario

Let's say you want to create a forecast to analyze your sales potential for the upcoming quarter. Imagine you have an experienced sales rep, Emma, and one with less experience, Olivia. With her experience, Emma can bring in more sales and revenue, while Olivia might not be able to deliver as much. A high target would be overwhelming for Olivia, while a low target might be unproductive for Emma. It's important to strike an overall balance to frame a productive forecast. In this case, Zia will analyze past data and suggest targets that are relevant to Emma, Olivia, and your organization as a whole. It will also predict the achievements that Emma and Olivia are actually likely to achieve.

## Create Forecast

Forecast Type Deal: Revenue based

Forecast Period ☒ Quarterly ☐ Monthly

Q1 2023

Forecast Name Zylker Sales Forecast Q1 2023

Forecast on ☒ All Deals ☐ Selected Deals

Cancel

Next

## Zylker Sales Forecast - Q1 2023

Deal Revenue

### Set Target

Company Target

Zylker

\$ 5000



CEO 1

\$ 5000



Christopher Maclead

\$ 5000



Sales Manager 4

\$ 2000



Nathan Brooks

\$ 1000



Sales Rep 2

\$ 1000



Olivia Brooks

\$ 250



Emma Jones

\$ 750

Total Values: \$4,000

### Current Deals

\$800  
Pipeline

\$1200  
Best case

\$1000  
Commit

\$1,000  
Won

Predicted target

**\$4,000**

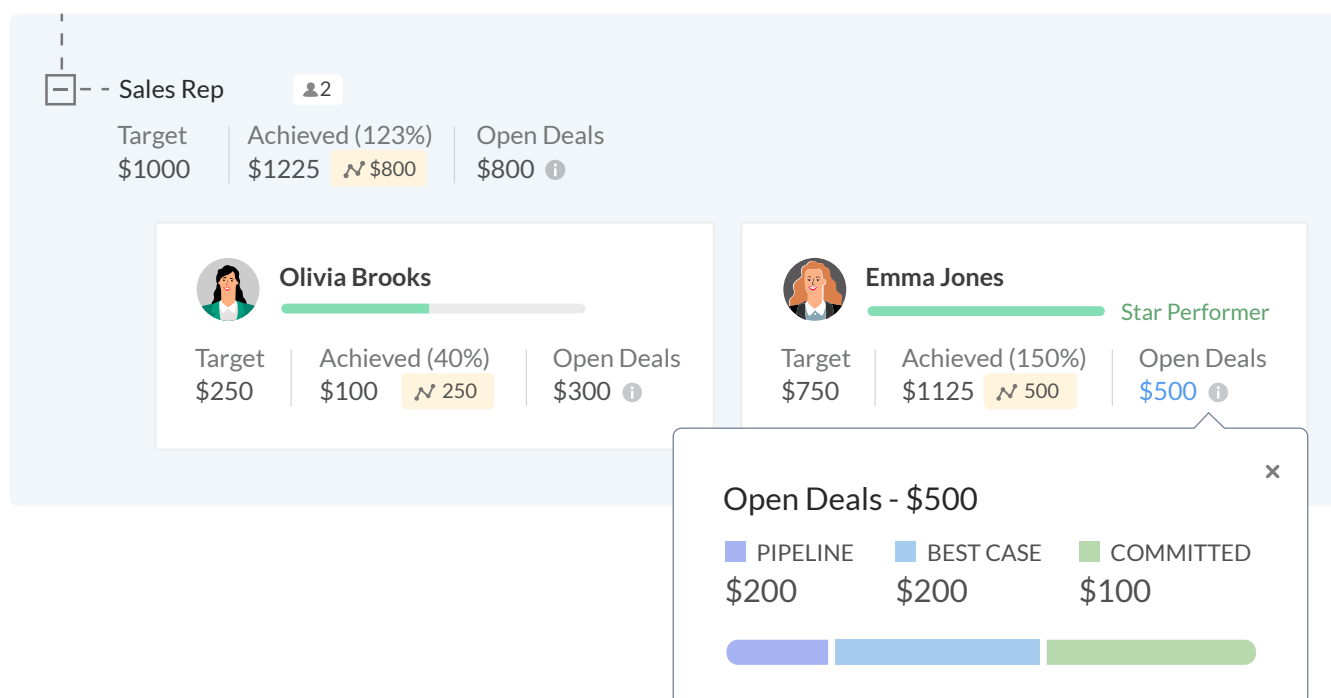
Set as target



Q4 - 2022  
\$5,000 / \$9,000



Q3 - 2022  
\$4,000 / \$9,000



## Bottom line

- ✓ Set ideal targets for your individual reps and organization as a whole in your forecasts
- ✓ Understand the probable achievements of your individual reps

## Resources

To learn more about how to configure AI forecasting in Zoho CRM, please review the documentation below:

- ✓ [AI in forecasts - help documentation](#)

# Anomaly detection

## Workflow anomalies

### Why look out for anomalies in workflows?

Workflow rules help you automate several sales activities and save a lot of time and effort for sales reps. But in cases where there are conflicts or mistakes in these rules—such as when a lead or contact is sent the same email template twice on the same day—it can be difficult to identify these errors manually among the many workflows you may have set up. Zia helps you identify these anomalies.

### Workflow anomalies in Zoho CRM

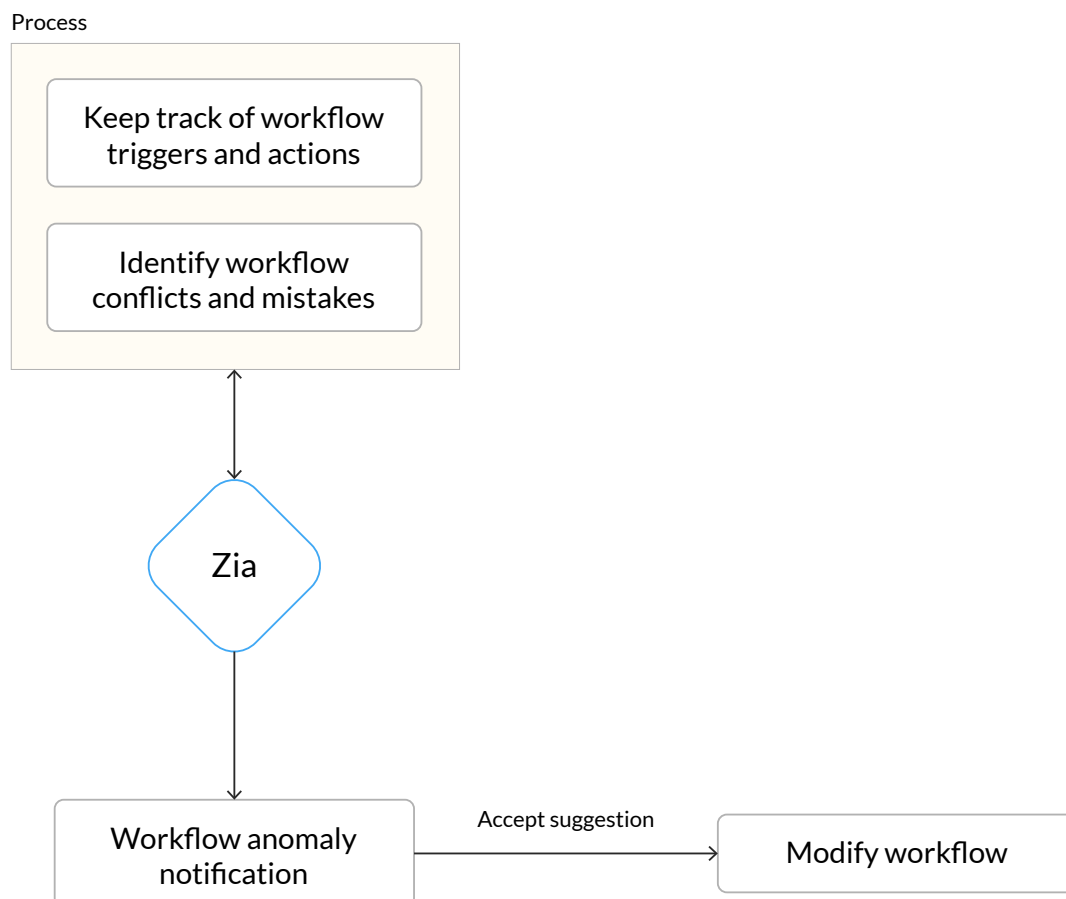
Zia detects anomalies in your workflow rules and provides relevant suggestions to enable you to identify and prevent conflicts and mistakes in them.

#### **Zia identifies and notifies you of anomalies for the following scenarios:**

- ✓ Untouched records created in the last seven days.
- ✓ Records created in the last seven days without email follow-ups.
- ✓ Anomalies in counts of records that were touched after modifying a workflow rule.
- ✓ Anomalies in email open rates after modifying a workflow rule.
- ✓ Anomalies in top-performing template open rates for workflow rules created in the last seven days.
- ✓ The same template for the same lead/contact is sent on the same day.
- ✓ The same lead/contact receives more than one template on the same day.

## How it works

The flow diagram below depicts how you can use workflow anomalies in Zoho CRM:



## Example scenario

Let's assume you've recently added a good number of leads. Your reps haven't followed up with some of them through email since the leads were added. This could prove detrimental to your organization in converting those leads into customers. Zia notifies you of the percentage of leads that haven't been attended to in the last seven days via the Zia notification panel. This helps your organization avoid losing leads due to lack of follow-ups.

Workflow Rule	Anomaly Component	Recommendation	Zia for Emails
<b>System Recommendations</b> Zia is conditioned to alert you when it senses anomalies in your workflows.			
Notification Name	Notify Via	Status	
Untouched records created in the last 7 days.	Zia Notification	<input checked="" type="checkbox"/>	
Records created in the last 7 days without email followup.	Zia Notification	<input checked="" type="checkbox"/>	
Anomaly in email open rate after modifying a Workflow rule.	Zia Notification	<input checked="" type="checkbox"/>	

Home

Leads without any email follow up

Zia
All Notification

Yesterday

**Workflow-Attention**  
40% of your Leads are without any email follow up for the past 7 days.

Lead Name	Company	Email
<a href="#">Chau Kitzman</a>	Creative Business Systems	<a href="mailto:chau.kitzman@cbs.com">chau.kitzman@cbs.com</a>
<a href="#">Michael Ruta</a>	Grayson Solutions	<a href="mailto:michael.ruta@grayson.com">michael.ruta@grayson.com</a>
<a href="#">Kayleigh Lace</a>	Feltz Printing Service	<a href="mailto:kayleigh.lace@feltz.com">kayleigh.lace@feltz.com</a>
<a href="#">James Merced</a>	Benton Inc	<a href="mailto:james.merced@benton.com">james.merced@benton.com</a>

## Bottom line

- ✓ Detect conflicts and mistakes in workflow rules
- ✓ Avoid sending unintended emails to your leads and contacts

## Resources

To learn more about how to configure workflow anomalies in Zoho CRM, please review the documentation below:

- ✓ [Workflow anomalies - help documentation](#)
- ✓ [Workflow anomalies notifications - help documentation](#)



## Trend analysis

### Why analyze trends?

Assume you haven't been checking the progress of deal closure for a while and suddenly notice a drop in the revenue due to fewer closures. Now, unless you monitor the status manually, chances are you'll miss important details and fail to take action at the right time.

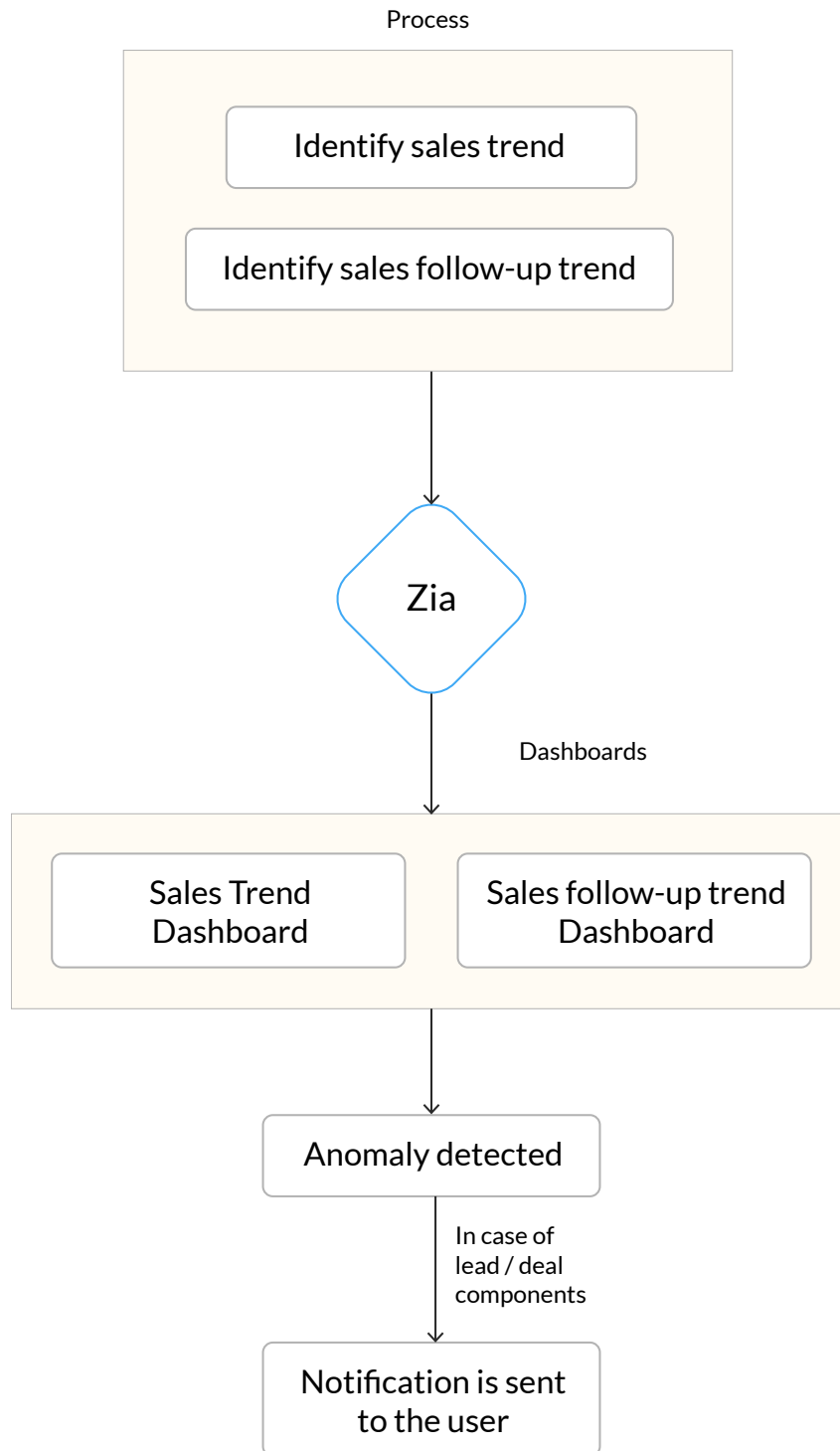
### Trend analysis in Zoho CRM

Zia's trend analysis helps you track sales analytics without the need for regular manual monitoring. It details your sales trends, team performance, and charts out important sales metrics based on current and past data.

Zia also detects and notifies you of any anomalies in these patterns so you can identify problem areas and take action at the right time, or determine what's helping the growth of your business so you can invest in it more.

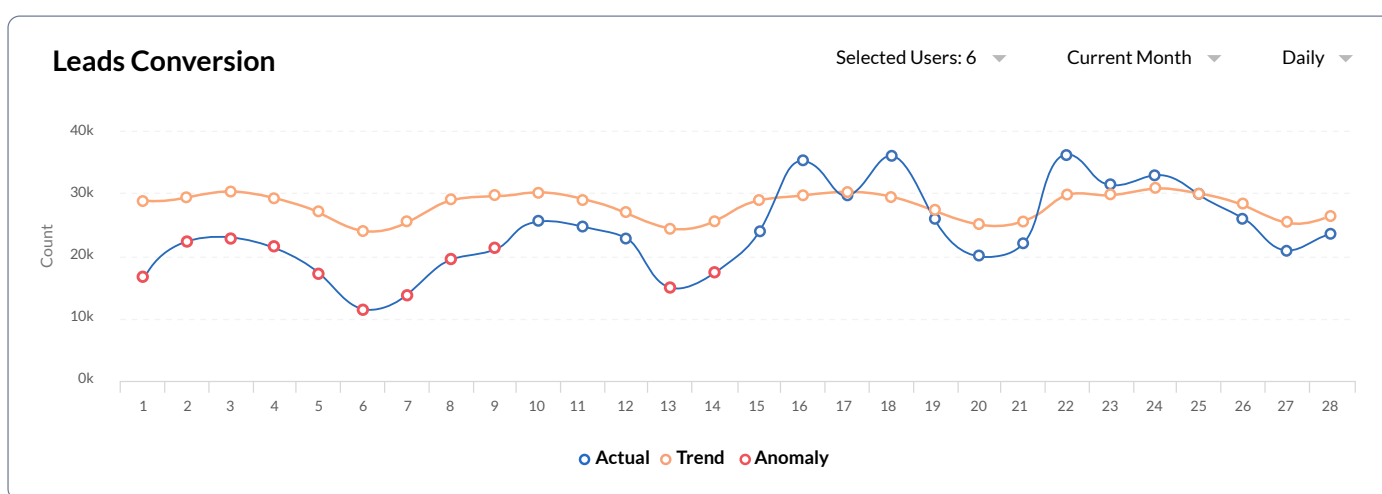
## How it works

The flow diagram below depicts how you can use trend analysis in Zoho CRM:



## Example scenario

Imagine you haven't been tracking the status of lead conversions in your account for a while, so you're not up to date about the success of your lead conversions or the corresponding trends. Zia trend analysis provides you with sales metrics that help you understand your lead conversion trends.



## Bottom line

- ✓ Track and understand sales metrics and trends

## Resources

To learn more about how to configure trend analysis in Zoho CRM, please review the documentation below:

- ✓ [Trend analysis - help documentation](#)

## Anomaly detector

### Why identify anomalies?

Market trends constantly change, which in certain instances might affect your business in an unusual manner as they significantly deviate from normal patterns. These trends might be beneficial or unfavorable to you, and will necessitate action from your end. Zia helps identify these anomalies.

Also, in your day-to-day business activities, it might not always be possible to keep an eye on your CRM—or, even if you are, you might not be continuously monitoring anomalies. To ensure you don't miss important information, Zia sends you anomaly notifications promptly.

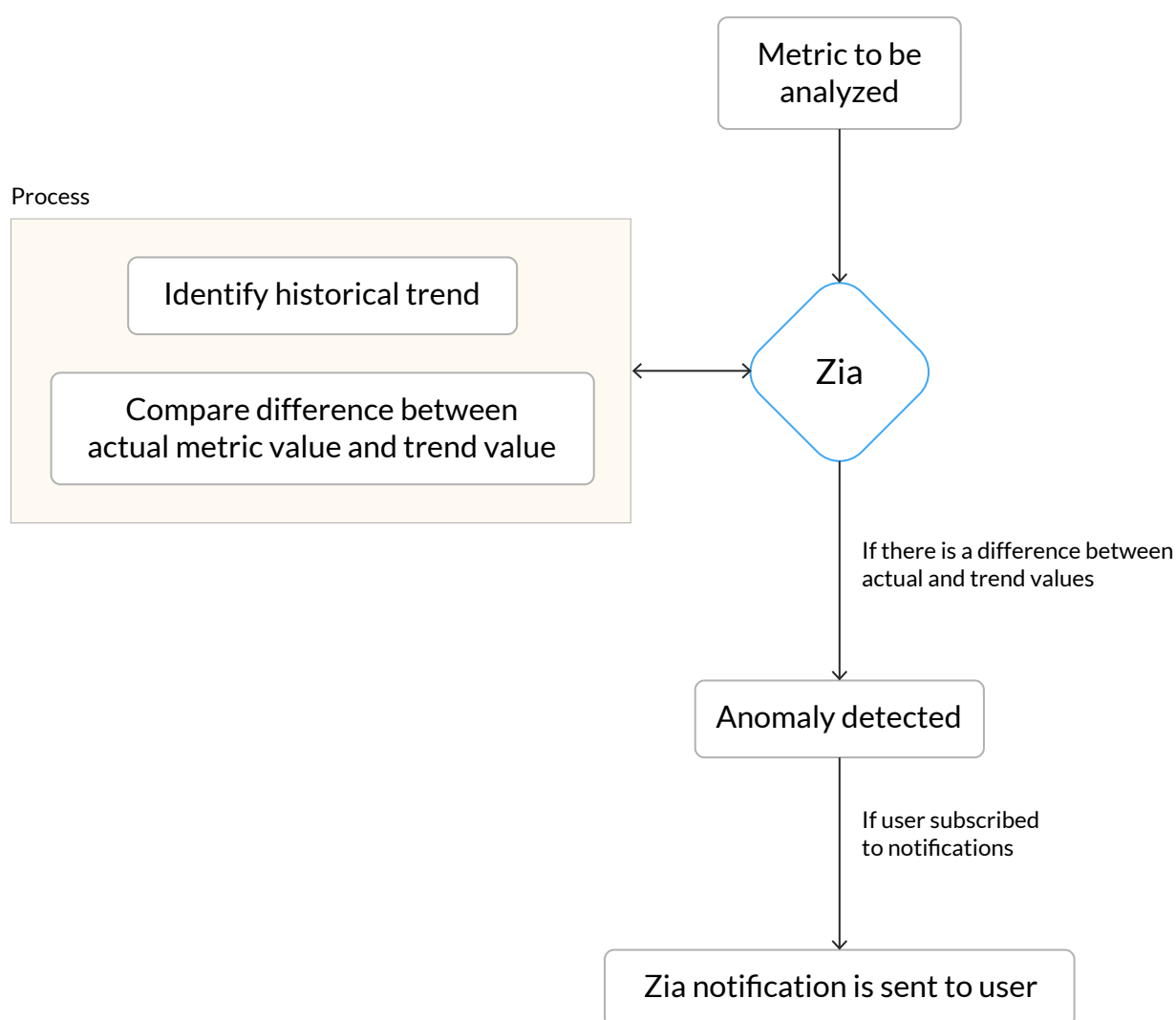
### Anomaly detector in Zoho CRM

Zia helps you identify unusual or outlying events, records, or objects that represent significant deviations from your normal business activities and trends.

Zia computes the expected trend by monitoring current and past sales trends. When there are any deviations from this expected trend, they will be identified as anomalies. You can enable notifications for components that have been shared with you, which means your sales reps can also receive valuable notifications regarding anomalies without having to check those components manually on a routine basis.

## How it works

The flow diagram below depicts how you can use the anomaly detector in Zoho CRM:



## Example scenario

Imagine your organization manufactures cars for customers across the globe. Let's say in one region the sales of your cars see a significant decline from your usual sales pattern. Zia alerts you to this anomaly to help you understand the situation better and troubleshoot.

### Add Anomaly Detector

Preview Image ?

1. Component Name

Car Sales India 2022

2. Anomaly For

Deals ▼

Count of - Deals ▼

Closing Date - Deals ▼

Criteria filter Remove

1

Stage ▼

is ▼

Closed Won ×

—

AND

2

Country ▼

is ▼

India ×

— +

Criteria Pattern (1 and 2) Edit Pattern i

3. Anomaly Duration

☐ Compare with another metric i

This Year ▼

Frequency - Monthly ▼

4. Objective

Consider increase in value as positive ▼

☐ Group By

Select grouping ▼

Cancel

Done



## Bottom line

- ✓ Identify business-impacting anomalies
- ✓ Receive anomaly notifications for anomaly detector and workflow anomalies components

## Resources

To learn more about how to configure the anomaly detector and notifications in Zoho CRM, please review the documentations below:

- ✓ [Anomaly detector - help documentation](#)
- ✓ [Anomaly notifications - help documentation](#)
- ✓ [Anomaly notifications for custom components - help documentation](#)

# Recommendation

## Recommendation builder

### Why seek product recommendations?

Without proper customer analysis, you might end up approaching customers with products or services that they don't need—or at least not in the form that they want it. Hence, it's important to understand customer interests and requirements by analyzing their behavioral and buying patterns so you can offer them products and services that are relevant to them. As in most cases, manual analysis for a wide range of customers with a variety of interests and needs is an extremely daunting task.

Zia provides your sales reps with product or service recommendations to help them approach customers with the appropriate offerings.

### Recommendation builder in Zoho CRM

Zia identifies and analyzes customer data like purchase details, interests, requirements, and behavioral patterns in order to suggest the most relevant products and services. In formulating recommendations, the AI assistant also compares customers' behavioral patterns to those of other customers with similar attributes.

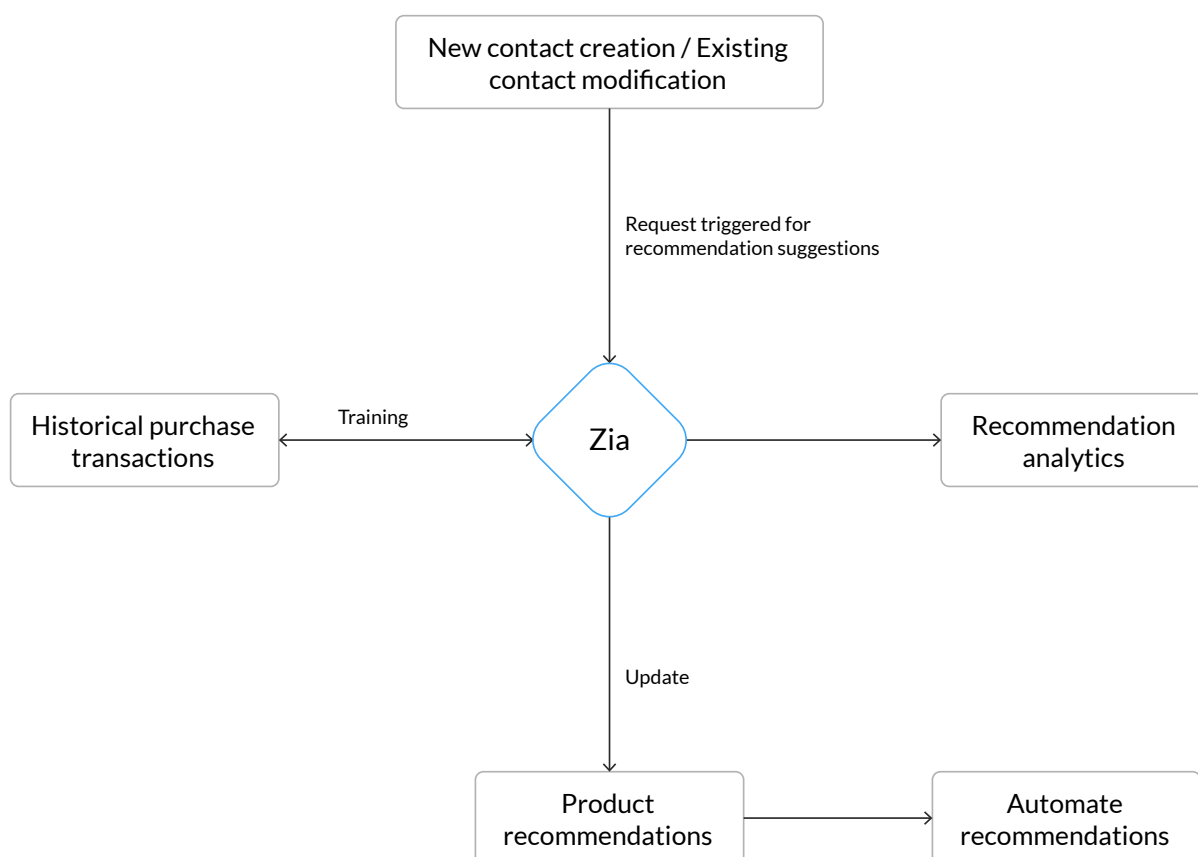
You can create your own recommendation models according to your varying business needs and set up notifications to send recommendations to your reps. They can use these recommendations to provide your customers with the right products and services, and also improve cross-selling. Furthermore, notifications can be sent everyday or every week and refined according to custom criteria so that notifications detail only selected products, services, deals, and so on.



You can also create workflow rules based on Zia recommendations and automate actions to be performed on the records before, after, or on the day of recommendation for a product or deal that a customer is deemed likely to purchase based on past purchases.

## How it works

The flow diagram below depicts how you can use the recommendation builder in Zoho CRM:



## Example scenario

Let's say you're running an ecommerce business selling various television brands. One of your customers is looking to buy a television and has purchased a significant number of other electronic items from a particular brand. Zia scans through the existing customer data and recommends television models from that particular brand.

You can also provide access to this recommendation for the respective record owner, enabling the record owner to offer more meaningful solutions to the customer and improve overall engagement.

**Builder** System Recommendations Analytics

**Create New Recommendation**

Recommendation name

**What to Recommend?**

Select module

Criteria ☒ All Records ☐ Selected Records

**Linking module that stores information between Accounts and Products?**

Select module

**Criteria for Deals completion state**

1

Duration ⓘ

Overview

Timeline


Contact Owner

Melinda Anderson

Email

leota-diliard@hotmail.com

Phone


 312-436-2083

Residing country

USA

Recommendation

< >



Relationship

Zylker 80 cm (32 inches) TV






\$199

Black

Last buy Zylker Laptop 15-inch

[Know more](#)

Reference contacts

## Bottom line

- ✓ Enhance customer experience with appropriate product suggestions to your customers
- ✓ Improve cross-selling and upselling
- ✓ Custom recommendations for any standard or custom module
- ✓ Automate and notify relevant recommendations to your sales reps

## Resources

To learn more about how to configure the recommendation builder in Zoho CRM, please review the documentation below:

- ✓ [Recommendation builder - help documentation](#)

## Recommendation analytics

### Why track the effectiveness of product recommendations?

While Zia's recommendations help you pitch the right products to your customers, there might also be instances where a recommendation model doesn't work for your organization. It's important to know how Zia's recommendations align with your business and optimize them so that they suit your customers' needs.

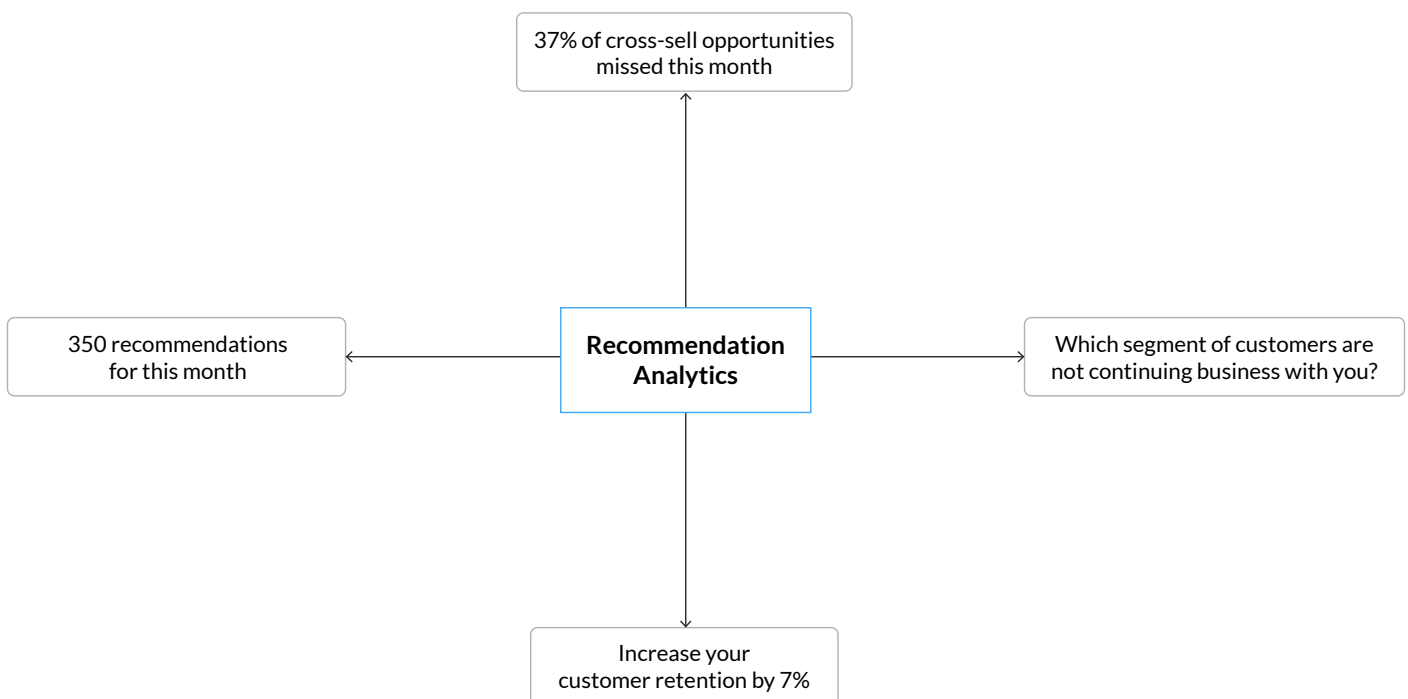
### Recommendation analytics in Zoho CRM

Zia's recommendation analytics provides you with an overview of the analytics involved in generating recommendations. The analytics include the number of active recommendations, the success rate of each recommendation, recommendation trends, and more.

These analytics enable you to understand the performance and relevance of the recommendation tool and modify it as per your business requirements.

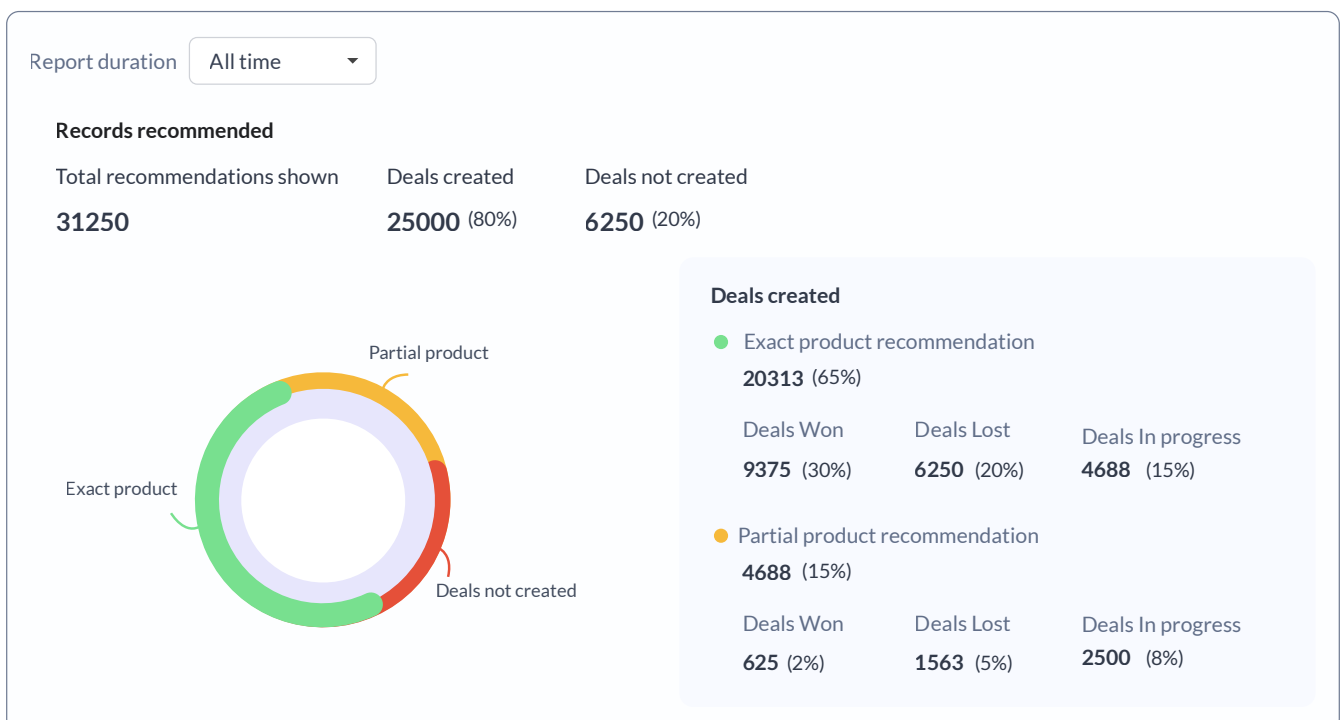
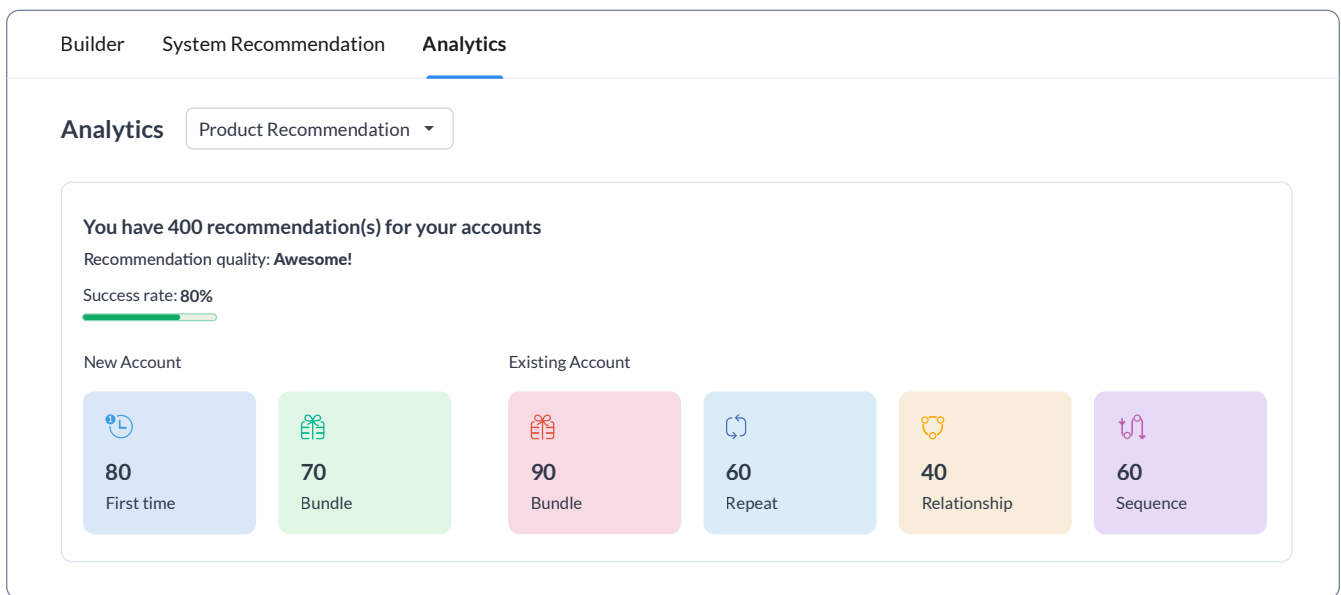
## How it works

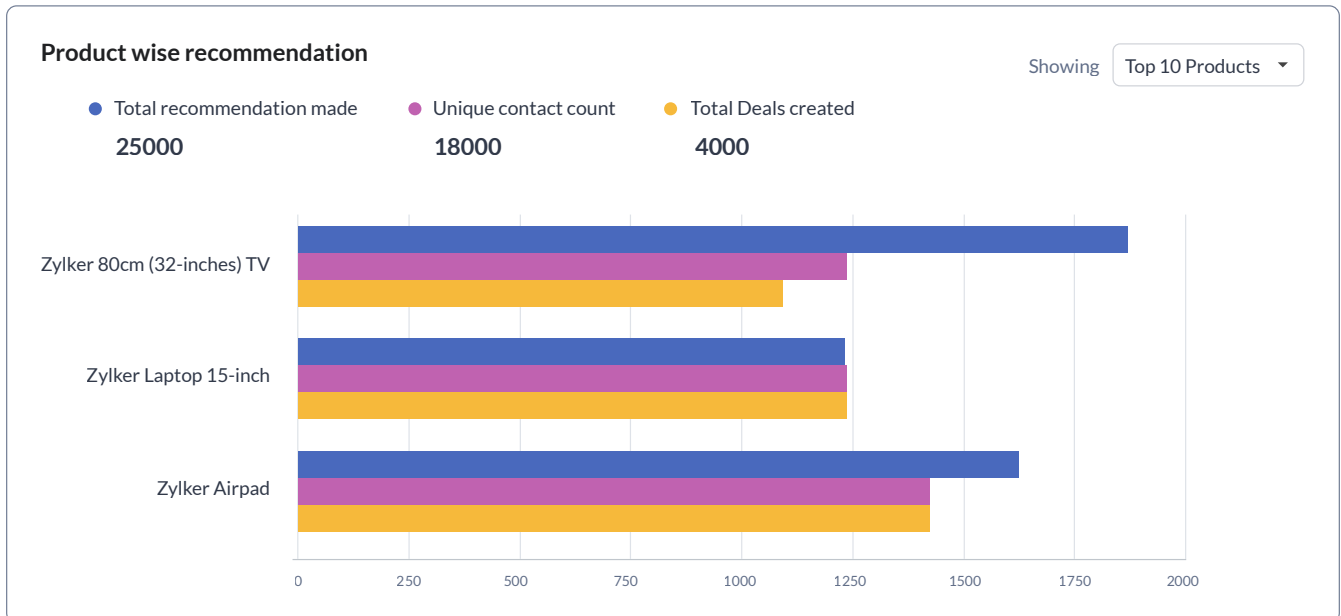
The flow diagram below displays some of the analytics that recommendation analytics in Zoho CRM provides you with:



## Example scenario

Consider the previous example in which you recommend television models of a particular brand to a certain customer. Zia's recommendation analytics details how effective this recommendation model is. Based on that assessment, you can decide how suitable the model is for your business needs and implement necessary changes.





## Bottom line

- ✓ Measure recommendation model performance
- ✓ Transform recommendations and align them with customer needs

## Resources

To learn more about how to configure recommendation analytics in Zoho CRM, please review the documentation below:

- ✓ [Recommendation analytics - help documentation](#)

## Similarity recommender

### Why look out for similarities between records?

Your sales reps need a proper understanding of their customers' needs in order to understand how a deal is likely to progress through the different stages in the sales process. Fortunately, there's a good chance other reps have handled similar deals before, so your reps can use them for reference.

Manually scanning through all your records to identify similar records is tiresome. Zia's similarity recommender can identify similarities between contacts, products, deals, and other records to make your sales reps better-equipped to handle deals.

### Similarity recommender in Zoho CRM

Zia's similarity recommender is a handy tool that compares one record with other records present in the module, identifies any similarities between them, and displays the five most similar records as recommendations.

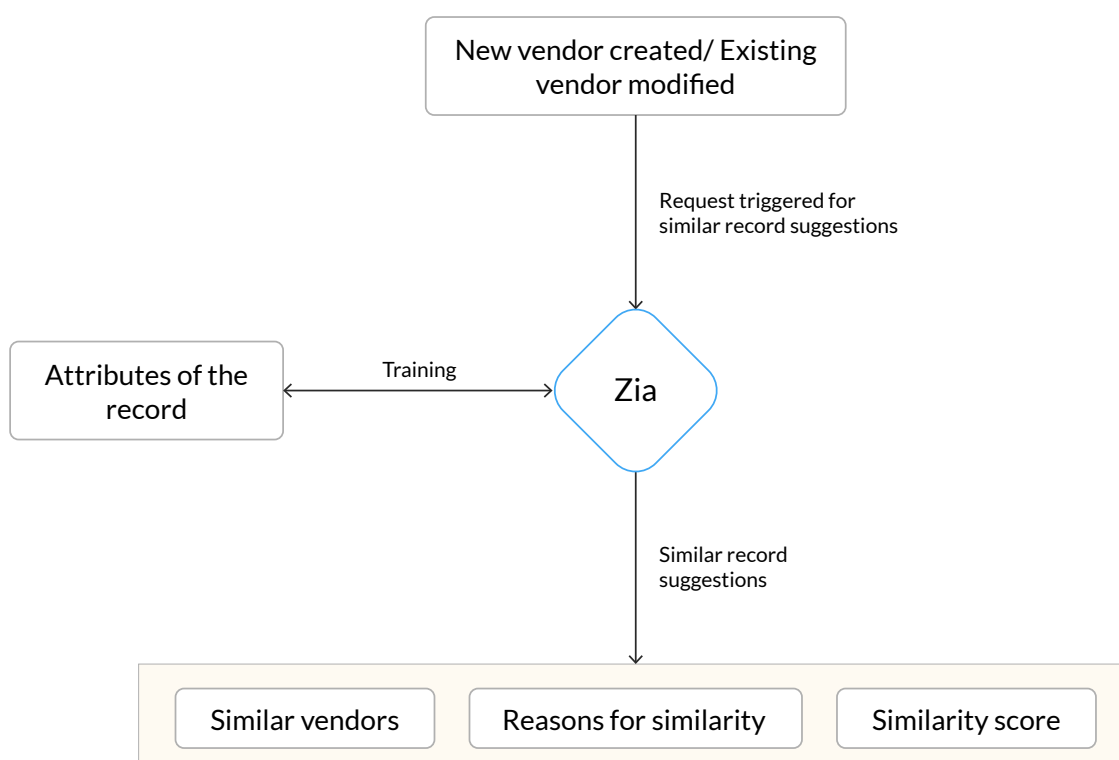
The tool also indicates which factors are similar across records, such as revenue, geographical location, or industry.

Your sales reps can use this information to understand how a previous deal went through various stages and therefore to implement the appropriate measures to ensure the deal is successfully closed.



## How it works

The flow diagram below depicts how you can use Zia's similarity recommender in Zoho CRM:



## Example scenario

Let's say you run a real estate business. A customer has recently bought a villa from you. You have a similar villa deal around the same price range with a prospect.

Zia lists your previously successful villa deal as a similarity recommendation and indicates what the similarities are. Your sales reps can leverage this similarity data to approach the new prospect with an effective sales pitch.

### Create New Rule

Rule Name

Similarity recommendation for

Criteria
☒ All Records
☐ Selected Records


Overview
Timeline

Deal Owner
Amelia Burrows

Email
burrows.amelia@zylker.com

Phone
332-936-2383

#### Similar Deals



Villas
\$170,000,000
423,345 sq.ft

Similarity score 70

##### Why is this deal similar?

- Property Type is Villa
- City is Beverly Hills
- Expected revenue > \$150,000,000

## Bottom line

- ✓ Understand customer needs and potential solutions through similar existing records

## Resources

To learn more about how to configure the similarity recommender in Zoho CRM, please review the documentation below:

- ✓ [Similarity recommender - help documentation](#)

## Workflow suggestions

### Why use workflow suggestions?

By creating workflow rules, you're identifying repetitive and predictable tasks and automating them—thereby saving your reps' time and effort. Just as performing these repetitive tasks consumes time, identifying them can also end up consuming much of your time. Zia workflow suggestions can identify repetitive tasks for you and suggest corresponding workflows.

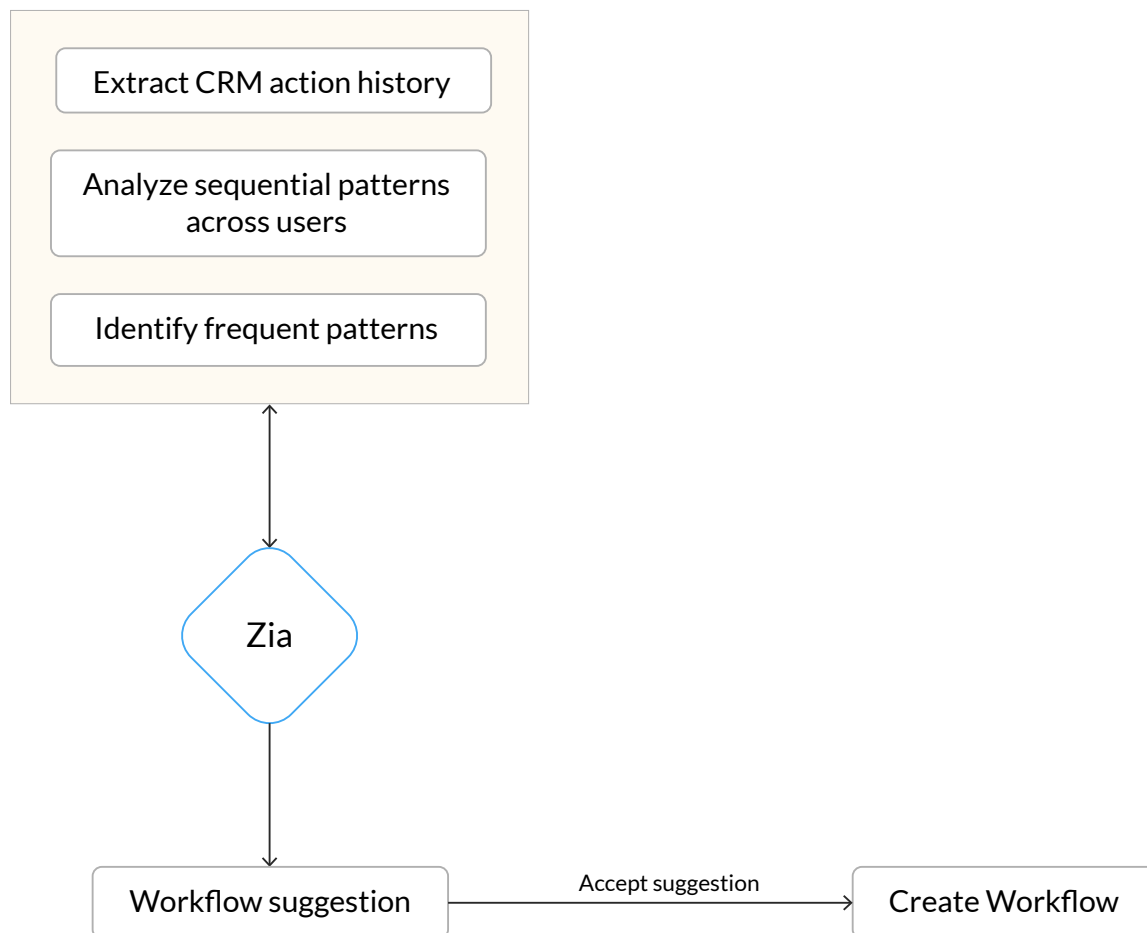
### Workflow suggestions in Zoho CRM

Zia suggests workflow rules by analyzing recurring actions performed in your organization's CRM account. When multiple users in your organization perform the same specific actions, Zia suggests that you create workflow rules for these actions with relevant criteria, and notifies you each time it suggests a workflow rule for your organization. You can remove or modify suggested workflows by adding or removing criteria or actions as needed.

## How it works

The flow diagram below depicts how you can use workflow suggestions in Zoho CRM:

Process



## Example scenario

Let's assume that when the value of the closing date field in the Deals module is two days away from its resolution time, most of the users in your organization regularly set the priority field as urgent. Zia now identifies this trend and suggests a workflow rule to automatically set the priority field value to urgent when the closing date is two days away.

[Builder](#)
[Analytics](#)
[System Recommendations](#)

### System Recommendations

Zia analyzes and learns from every single process your organization execute inside CRM. These customized recommendations will improve the way you work.

Macro Suggestion

Workflow Suggestion

#### Zia suggested Workflow for Deals

Save 5 minutes per month of your team's time by creating the below suggested workflow.

WHEN

This rule will be executed 2 Day(s) Before Closing Date at 08:00 AM.

CONDITION

Stage ISN'T Closed Won, Closed Lost

Instant Actions

Field Updates

Urgent Priority

Create as Workflow

All Notification

Yesterday

Workflow - Suggestion

Maximise your team's productivity by automating some routine activities. Zia has got some tailor-made workflow suggestions for you.

Tuesday, Nov 8

Workflow - Attention

40% of your Deals are without any email follow up for the past 7 days.

## Bottom line

- ✓ Automatically identify repetitive tasks
- ✓ Create workflow rules based on Zia's suggestions

## Resources

To learn more about how to configure workflow suggestions in Zoho CRM, please review the documentation below:

- ✓ [Workflow suggestions - help documentation](#)

## Owner assignment suggestions

### Why would you need owner assignment suggestions?

Every record is unique and needs the most appropriate record owner to handle it based on its unique traits. Manually scanning through records to assign record owners is exhausting and time-consuming. To help make it easier, Zia can suggest owner assignments based on various factors.

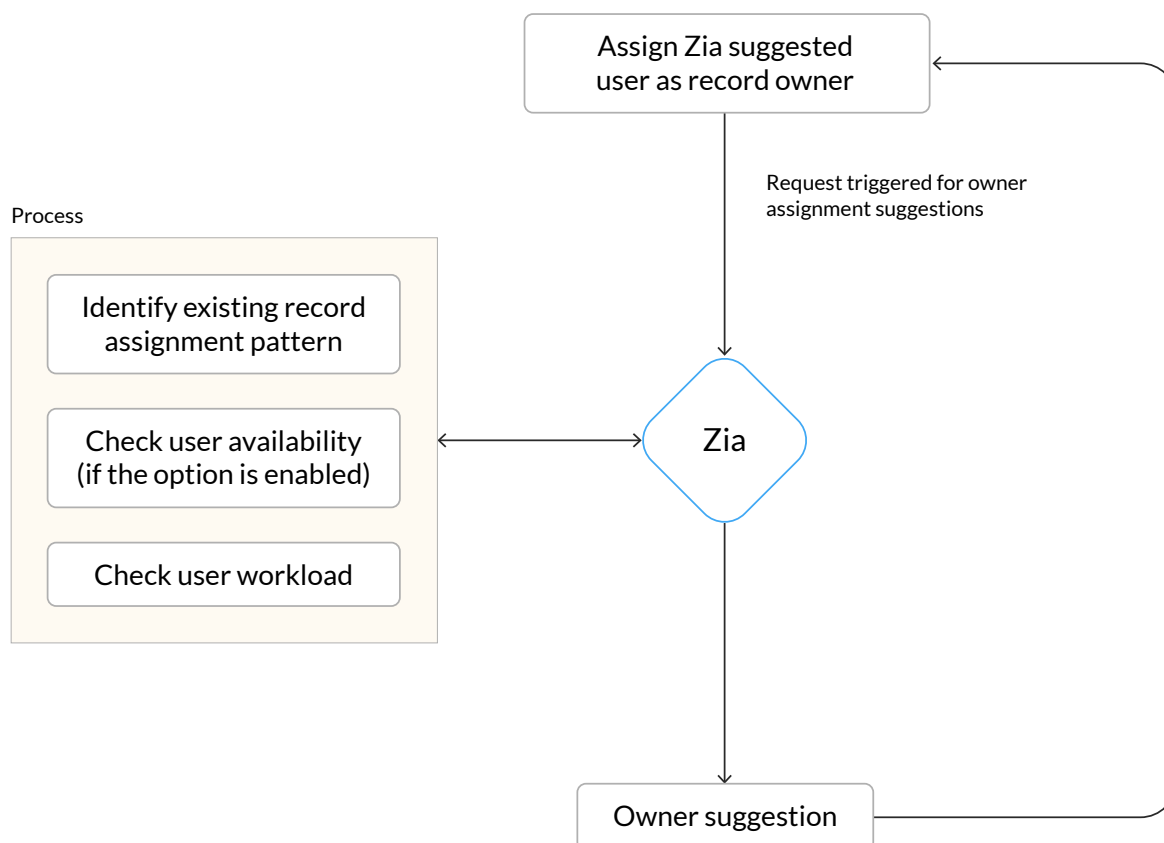
### Owner assignment suggestions in Zoho CRM

Zia studies existing assignment patterns to determine which owner is most suitable for a record. The AI assistant accounts for all relevant fields to identify a pattern.

Another influential factor is the user threshold, which is the number of records a user can handle per day, week, or month. This factor helps Zia avoid overloading or under-loading a user with too many or too few records, respectively.

## How it works

The flow diagram below depicts how you can use owner assignment suggestions in Zoho CRM:






## Example scenario

Let's say a rep in your organization—Robert—takes care of leads from the UK-based manufacturing industry, while another rep—Anil—handles leads from the India-based real estate vertical. Zia studies the records in your organization and understands which kinds of records are owned by which users. When a UK-based lead from the manufacturing industry reaches out to your organization, Zia suggests that the record be assigned to Robert, while also suggesting that any Indian-based leads from the real estate industry be assigned to Anil.

Rules   Thresholds   **Zia**

**User pattern determined by Zia** ⓘ

Users: All Users ▾ 

Pattern 1	Count : 2	Users	User Count : 1
IF   Industry is Manufacturing AND   Region is UK		 Robert robert.s@zylker.com	
Pattern 2	Count : 2	Users	User Count : 1
IF   Industry is Real Estate AND   Region is India		 Anil anil.v@zylker.com	

## Bottom line

- ✓ Assign records to the most appropriate owners

## Resources

To learn more about how to configure owner assignment suggestions in Zoho CRM, please review the documentation below:

- ✓ [Owner assignment suggestions - help documentation](#)



## Macro suggestions

### Why would you need macro suggestions?

You can execute multiple actions simultaneously for a group of records by building all of your routine actions into a macro. Also, you can further reduce your efforts by letting Zia identify these actions for you.

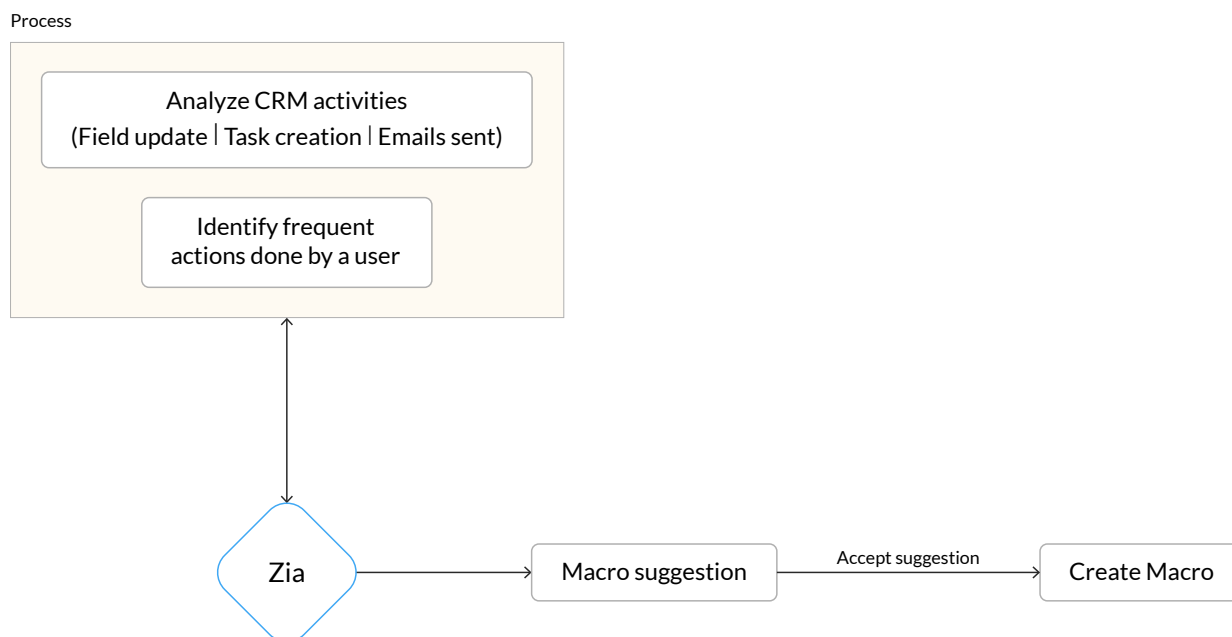
### Macro suggestions in Zoho CRM

Similar to workflow suggestions, Zia auto-suggests macros for you to create based on your CRM activities. If you've been repeating the same set of actions over a period of time and on multiple records, Zia will automatically suggest that you create macros for these actions.

While workflow suggestions suggest you to create workflow rules based on recurring actions performed by many users in your organization, Zia offers macro suggestions to individual users based on recurring actions performed by those particular users.

## How it works

The flow diagram below depicts how you can use macro suggestions in Zoho CRM:



## Example scenario

Let's say you perform a set of actions for leads created seven days ago and with whom you're yet to establish communication. Those actions are as follows:

- ✓ Send a follow-up email
- ✓ Update the lead status field to "Contacted"

You perform these actions on a daily basis and ensure that these leads are sent a follow-up email to improve your lead engagement and conversion. Zia will suggest that you create a macro out of these actions.

[Builder](#)
[Analytics](#)
[System Recommendations](#)

### System Recommendations

Zia analyzes and learns from every single process your organization execute inside CRM. These customized recommendations will improve the way you work.

Macro Suggestion

Workflow Suggestion

☒

☒

### Macro Suggestions

After reviewing your daily process, Zia has organized your most frequently occurring actions into Macros. These routine actions can now be performed in a single click. [Learn more about Macros](#)

Saturday, Oct 15

**You could have saved 10 minutes by automating the following actions**

Field Updated

Lead Status = Contacted

Email Template Sent

Lead follow-up email

Lead follow-up macro

Would you like to set up a macro to automate this process?

Create Macro

Discard

All Notification

Today

**Workflow - Macro Suggestions**

We have a few macro suggestions that could help you save time.

## Bottom line

- ✓ Get automatic macro suggestions

## Resources

To learn more about how to configure macro suggestions in Zoho CRM, please review the documentation below:

- ✓ [Macro suggestions - help documentation](#)

## Next best experience

### Why would you need next best experience suggestions?

Every customer journey—from lead nurturing to deal closure—involves various stages. Different prospects have different challenges along the journey, some of them stuck in one stage and others in another stage. With Zia's next best experience suggestions, you can provide your prospects with the best possible experience by resolving their unique challenges at various stages throughout the customer journey.

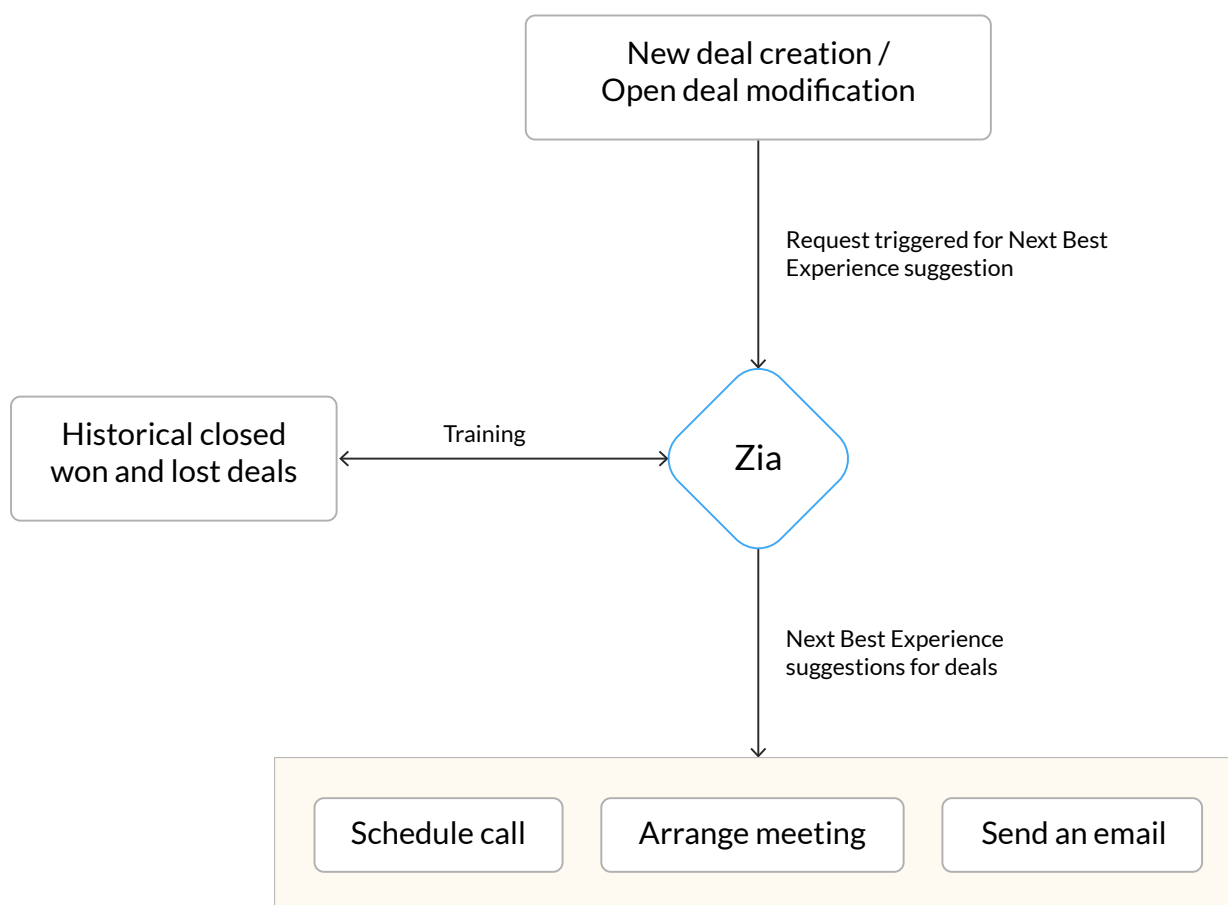
### Next best experience in Zoho CRM

When the feature is enabled, Zia will monitor all open and active deals in your organization, analyze the deal stage, suggest the next best experience that you can provide, and prompt you to take action.

Zia does this by studying closed deals and analyzing the time taken for similar deals to progress from one stage to another. With this information, Zia correlates patterns and behaviors, such as industry, deal type, repeat customers, and more, to suggest the next best experience.

## How it works

The flow diagram below depicts how you can use Zia's next best experience suggestions in Zoho CRM:



## Example scenario

For example, needs analysis is an important stage in a sales pipeline. During this stage, the major challenge a sales rep might face is obtaining a clear and full understanding of the prospect's requirements.

When your prospects enter this stage, the feature might prompt you to schedule a meeting within the next two days to put your prospects at ease and assess their needs—all based on historical data in your CRM.

The screenshot displays the Zoho CRM interface for a deal titled "Zylker Single Lens Specs Deal". The deal is categorized as a "Regular customer" and a "High value deal". The interface shows a timeline with stages: Qualification, Needs Analysis (current stage), Value Proposition, Decision Making, Proposal/Price Quote, Negotiation/Review, Closed Won, and another Closed Won. The deal owner is Sage Wieser, the stage is Needs Analysis, the expected revenue is USD 750,000, the closing date is Apr 3, 2022, and the territory is North America - ET.

The "Next best experience" section suggests arranging a meeting within 2 days. A "Create Meeting" button is visible. A modal window titled "Meeting Information" is open, showing the following details:

- Understanding technical and functional requirements
- Location: USA
- All day: ☐
- From: Jan 20, 2022 9:00 AM
- To: Jan 20, 2022 11:00 AM
- Host: Sage Wieser
- Participants: Amelia Burrows
- Meeting Color Picker: -None-

Buttons for "Add more details", "Cancel", and "Save" are at the bottom of the modal.

## Bottom line

- ✓ Resolve personalized customer journey challenges
- ✓ Avoid losing deals
- ✓ Monitor open and active deal stages

## Resources

To learn more about how to configure next best experience feature in Zoho CRM, please review the documentation below:

- ✓ [Next best experience - help documentation](#)

# Communication

## Best time to contact customers

### Why assess the best time to contact customers?

Contacting a customer at an inappropriate time might end up annoying the customer, damaging your relationship, and—worst case scenario—causing them to churn. Knowing that tiny mistakes like that can have such negative effects can be a difficult pill to swallow. Hence, it's important your sales reps know when to contact customers.

With many customers spread across different verticals, manually determining the best time to contact each customer is a time-consuming task. Zia does this job for you.

You also don't want to end up in a situation where you forgot to contact your leads or customers amid all your other tasks. Setting reminders can help you overcome this. But with Zia reminder, you need not manually set up reminders.

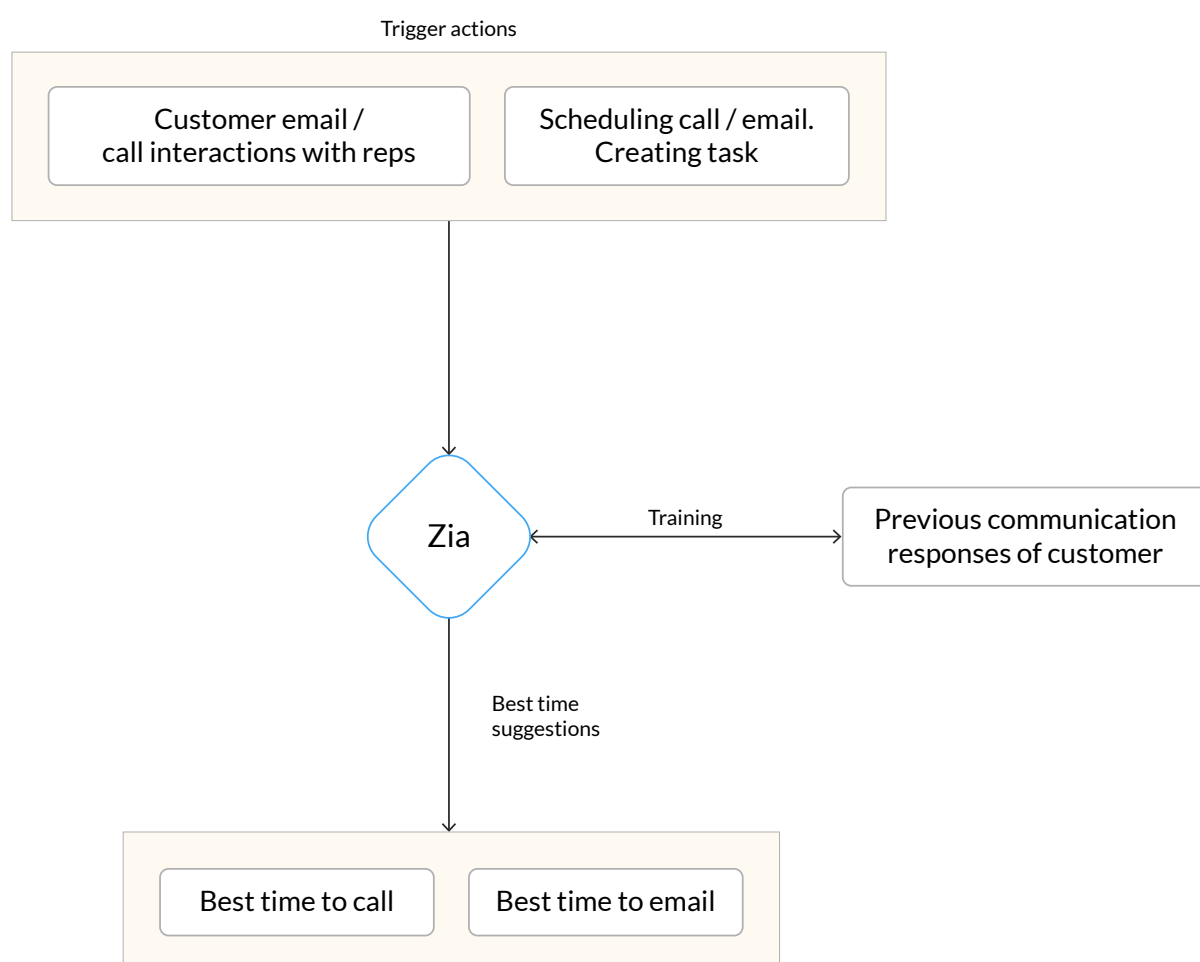
### Best time to contact customers in Zoho CRM

Zia identifies the best time to contact a customer based on the customer's actions, such as when the customer answers your calls, replies to your emails, how long they take to respond to emails, and the time of day when they most often reply or take your calls. Based on this, Zia suggests the best time to send an email or call.

Zia sets up reminders for your records based on your best time to contact suggestions, thus eliminating the need for you to set these reminders manually. Zia also sends activity reminders based on their respective best time to contact suggestions.

## How it works

The flow diagram below depicts how you can use best time to contact suggestions in Zoho CRM:





## Example scenario 1

Let's assume you had an email conversation with a customer. Zia tracks factors like the time of the customer's replies to your emails and how long she took to respond to your emails, and then comes up with a suitable time to contact that customer.

**Mrs Simonette Camber - Chapman**  
Add Tags

Send Email Convert Edit ... < >

Overview Timeline Data Privacy Last Update : 2 day(s) ago

Lead Owner Zach Stephan

Email [simonette.camber@chapman.com](mailto:simonette.camber@chapman.com)

Phone (563) 244-2614

Phone (209) 468-7004

Lead Status Attempted to Contact

**Best time to** Today

Call

☆ 08:00 PM in 8 hours 33 minutes

Email

☆ 02:00 PM in 2 hours 33 minutes

## Example scenario 2

Let's say you have around 4 tasks to be completed today. You don't have to set reminders for each task. Instead, you can just click on the Let Zia remind you option, and that's it—Zia will take care of the reminders for you.

Home

Welcome Stephen

My Today's Tasks ▾ Let Zia remind you

TODAY 149	Marketing Automation Demo	In Progress	High
TODAY 159	Get Approval from Manager	In Progress	High
TODAY 157	Register for upcoming CRM Webinars	In Progress	Normal
TODAY 158	Refer CRM Videos	In Progress	High

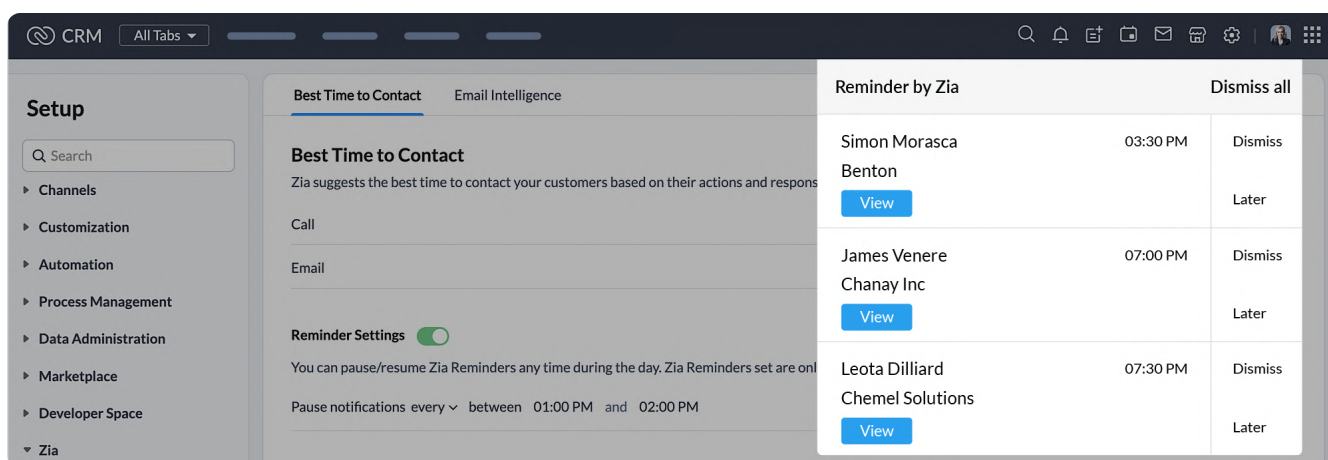
### Set Reminder by Zia

Select which records you'd like Zia to remind you about. Zia calculates when a contact is most likely to respond and sets a reminder for that time.

- Zia reminders are only valid for one day. Every night at 12AM, the previous day's reminders are cleared from your notifications and a new set of Zia reminders are generated.
- Regardless of how many records you select, Zia will only display up to 300 reminders per day.
- ☒ Also include new records that get added to this view

Cancel

Set Reminder



The screenshot shows the Zoho CRM interface. On the left is the 'Setup' sidebar with a search bar and a list of categories: Channels, Customization, Automation, Process Management, Data Administration, Marketplace, Developer Space, and Zia. The main content area is titled 'Best Time to Contact' under the 'Email Intelligence' tab. It explains that Zia suggests the best time to contact customers based on their actions and responses. Below this, there are sections for 'Call' and 'Email'. A 'Reminder Settings' toggle is turned on, and a note states: 'You can pause/resume Zia Reminders any time during the day. Zia Reminders set are only active when the toggle is turned on.' A dropdown menu shows 'Pause notifications every' with a selection of 'between 01:00 PM and 02:00 PM'. On the right, a 'Reminder by Zia' table displays a list of reminders with columns for the contact name, the suggested time, and actions to 'Dismiss' or 'Later'. Each row also has a 'View' button.

Reminder by Zia		Dismiss all
Simon Morasca Benton	03:30 PM	Dismiss
<a href="#">View</a>		Later
James Venero Chanay Inc	07:00 PM	Dismiss
<a href="#">View</a>		Later
Leota Dilliard Chemel Solutions	07:30 PM	Dismiss
<a href="#">View</a>		Later

## Bottom line

- ✓ Prevent inappropriately timed customer communications
- ✓ Improve chances of getting customer responses
- ✓ Set automatic activity reminders
- ✓ Avoid missing out on lead and customer communications

## Resources

To learn more about how to configure the best time to contact suggestions and the related Zia reminders feature in Zoho CRM, please review the documentation below:

- ✓ [Best time to contact customers - help documentation](#)
- ✓ [Zia reminders - help documentation](#)

## Best time to contact analytics

### Why analyze best time to contact suggestions?

Zia provides you with suggestions regarding the best time to contact a customer based on previous customer interactions. But as with any suggestion, you need to analyze how accurate and effective the suggested times are, and what value they add to your organization. The best time to contact analytics feature helps you achieve this.

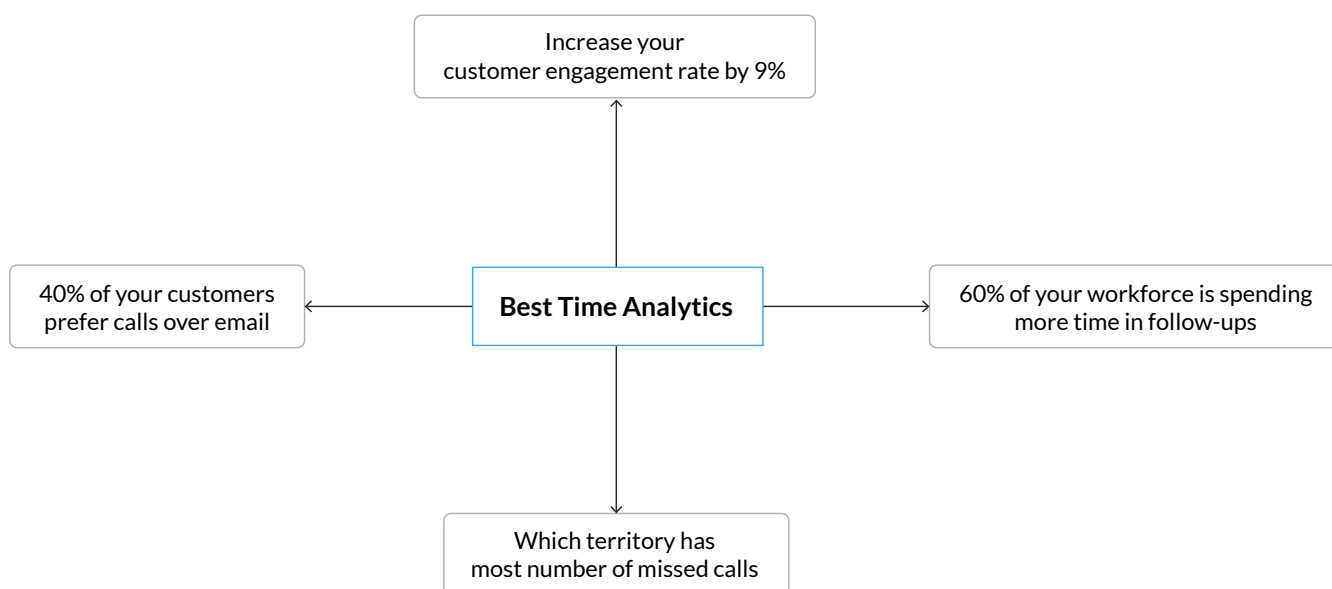
### Best time to contact analytics in Zoho CRM

In Zoho CRM, Zia compares your interactions with best time to contact suggestions and provides various analytics, such as the summary of best time to contact suggestions, individual analyses of outgoing calls and emails, and how your reps use the best time to contact feature for emails and calls.

These analytics help you understand factors like why a lead failed to convert, how efficient sales reps are, and how effective your emails and calls are—all with respect to Zia's best time to contact suggestions.

## How it works

The flow diagram below displays some of the analytics that best time to contact analytics in Zoho CRM provides you with:



## Example scenario

Let's say you've recently lost a few leads. As part of your analysis of why, you want to check when your sales reps contacted those leads. Instead of having to manually dig through each rep's records, you can rely on Zia, which reports how reps have used the best time to contact suggestions.

## Best time followers

This section helps you to understand who and all used best time for their communication and their respective conversion rates.

Most Used ⓘ									
	Best time			Different time					
User name	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Total activities done	Best time usage count	Success of best time
Amelia Burrows	762 (15%)	784 (89%)	53%	548 (35%)	1613(45%)	42%	3707	1546	↑ 11%
Jacob Luluwayo	657 (30%)	1309 (67%)	54%	1451 (43%)	731(83%)	56%	4148	1966	↓ 2%
Joane Lee	1280 (51%)	503 (30%)	45%	597 (53%)	998(12%)	27%	3378	1783	↑ 18%
Tresa Sweely	1493 (62%)	1154 (42%)	53%	481 (14%)	989(6%)	9%	4117	2647	↓ 21%

Least Used ⓘ									
	Best time			Different time					
User name	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Total activities done	Best time usage count	Success of best time
Martha Hills	1821 (48%)	873 (80%)	59%	472(92%)	1455(63%)	70%	4621	2694	↓ 11%
Peter Gallante	1254 (57%)	430 (38%)	53%	1014 (97%)	681(85%)	92%	3379	1684	↓ 39%
Leota Dilliard	1393 (68%)	567 (83%)	72%	671 (83%)	793(36%)	58%	3424	1960	↑ 14%
Tai Chang	787 (45%)	118 (26%)	55%	1037 (93%)	805(54%)	47%	3826	1974	↑ 8%

## Bottom line

- ✓ Evaluate performance of best time to contact suggestions and understand conversion failures
- ✓ Analyze the performance of your emails and calls
- ✓ Analyze reps' best time suggestion usage

## Resources

To learn more about how to configure best time to contact analytics in Zoho CRM, please review the documentation below:

- ✓ [Best time to contact analytics - help documentation](#)

# Vision AI

## Why validate images using vision AI ?

When selling products, it's essential that you maintain accurate images for those products—from the product's latest branding to the product's correct color. Customers prefer not to buy products with incorrect, unrelatable, or absent images. With bad product images, there's a chance of losing customers and having to invest a lot of time into correcting the images. The image validation feature, part of Zia's vision AI capabilities, helps you overcome this challenge.

## Image validation in Zoho CRM

Zia's image validation feature validates images in one of two ways: classification or detection.

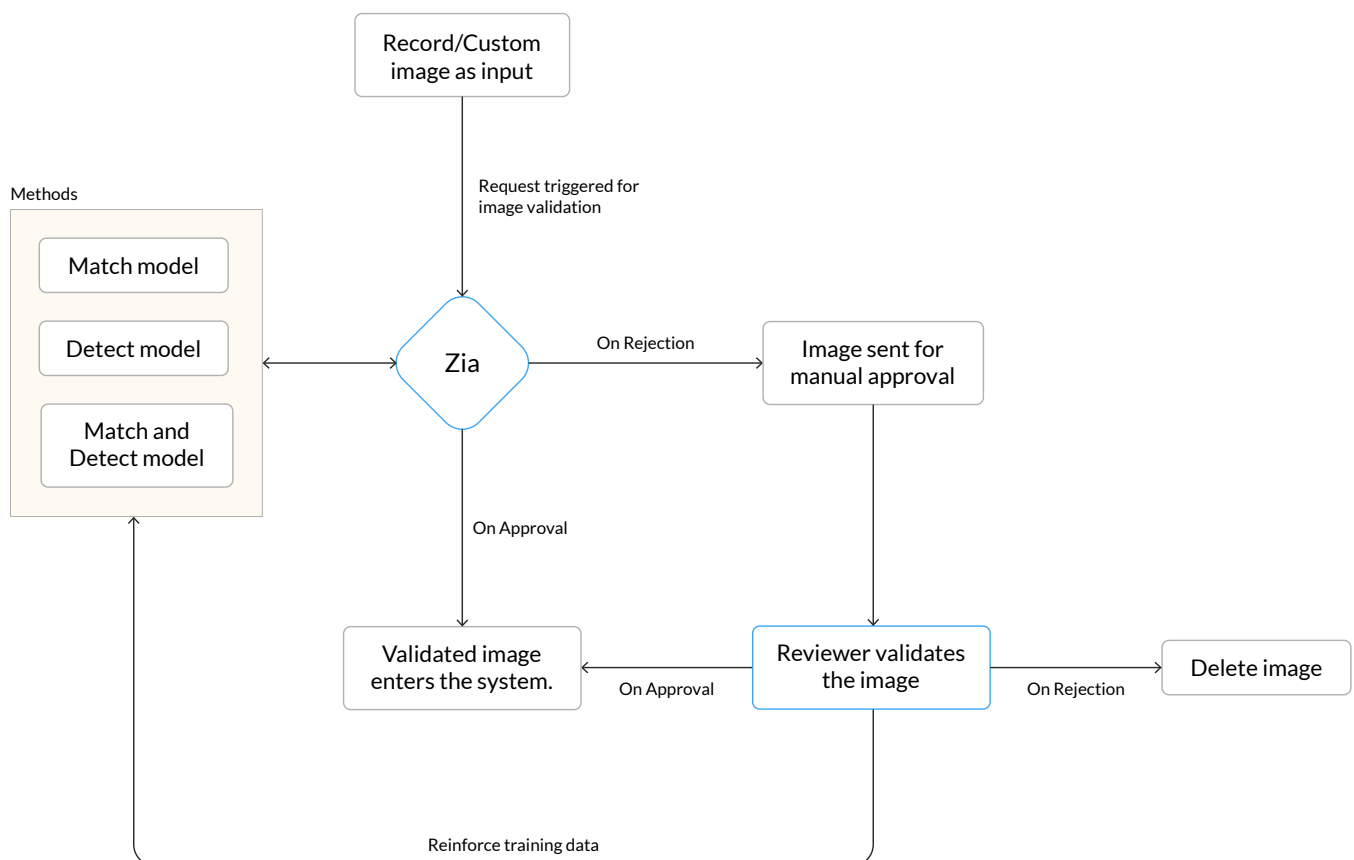
For image classification, Zia considers the entire image for validation and matches it to the pattern learned through training data. For example, Zia might prevent someone from accidentally uploading a picture of a washing machine instead of a refrigerator. You can define "desired" or "undesired" images for Zia's validation based on acceptable and unacceptable images, respectively.

For image detection, instead of assessing the entire image, Zia matches a part of an image to the pattern learned from the training. For example, a car must have a number plate. If a number plate isn't detected, it's considered invalid and sent for manual approval. You can train Zia to mark an image as valid or invalid based on whether an object is detected or not detected.

Zia also calculates success rate that gives you the percentage of successful validations which helps you analyze your training data.

## How it works

The flow diagram below depicts how you can use image validation in Zoho CRM:




## Example scenario 1

Let's say you run a car service company. Since you provide services related specifically to cars, you only need to maintain images of your customers' cars. You classify these cars into various segments such as SUV, MUV, hatchback, and so on. For example, you now validate SUV and hatchback cars.

You can use the match validation type to train Zia to recognize SUV and hatchback cars. If the validation is successful for a record, the image will be updated in that record.

### Type of validation


☒



**Match the image**

Match the entire input image to the pattern that Zia has created using the training data.

☐




**Detect objects**

Detect objects in the input image by Zia has created using training data.

### Upload Training Data ?


☒



**Desired**

Upload permissible images according to your organization's preferences.

☐




**Undesired**

Upload images that might be prohibited or unexpected in your organization.

1

Label name

OR


 SUV cars ×

[Add more images](#)

2

Label name

⊖

 Hatchback cars ×

[Add more images](#)

Vision AI

64






## Example scenario 2


Let's say that you are a car reseller. You need to ensure that the cars you resell do not contain dents and paint scrapes. You upload images of the cars that you are reselling and create an approval process where only images with no dents and paint scrapes are approved. One of the cars has a dent that reflects in the uploaded image and hence the validation will fail and the image will be sent for manual approval.

**Type of validation**

☐

**Match the image**

Match the entire input image to the pattern that Zia has created using the training data.

☒

**Detect objects**


Detect objects in the input image by Zia has created using training data.

**Upload Training Data** ⓘ

1

Object name

Car dents

 Dents ×

[Add more images](#)


Object ☐ Is detected ☒ Is not detected

AND

2

Object name

Paint scrape

 Scrapes ×

[Add more images](#)

Object ☐ Is detected ☒ Is not detected

## Car Resale

Modified By : Martha Hills

Module	Cars
Layout	All Layouts
Field	Car Image
Action on failure	Send image for approval

## Training data

### Detect

Not to be detected	Car dents <a href="#">Dents</a> Paint scrape <a href="#">Scrapes</a>
--------------------	---

Rule pattern for validation success ( [Car dents is not detected](#) or [Paint scrape is not detected](#) )

## Zylker Companion Y850

Cars



### Image Approval 1

### Image validation failure

The uploaded image has been sent for approval on image validation failure. The following image(s) does not align with organization norms.

Zylker Companion Y850
Cars

Image Approval 1

Image validation failure

The uploaded image has been sent for approval on image validation failure. The following image(s) does not align with organization norms.

Object detected  
Field  
Rule Name  
Awaiting Since  
Rule pattern

Car dents(2)  
Car Image  
Car Resale  
Today  
(Car dents is not detected and Paint scrape is not detected)

Accept
Reject

Object detected	Car dents(2)
Field	Car Image
Rule Name	Car Resale
Awaiting Since	Today
Rule pattern	( <a href="#">Car dents is not detected</a> and <a href="#">Paint scrape is not detected</a> )

Accept

Remove

## Bottom line

- ✓ Prevent mismatches between products and their respective images

## Resources

To learn more about how to configure image validation in Zoho CRM, please review the documentation below:

- ✓ [Image validation - help documentation](#)

# Conversational AI

## Why use conversational AI?

Through conversational AI, your computer applications can comprehend human modes of communication such as voice or chat and execute your instructions for you. For example, to fetch data, it might not be very efficient to search manually or even apply filters. Using the Ask Zia feature, a part of Zia's conversational AI capabilities, you can simply ask your queries to Zia, through voice or chat, and fetch the required data.

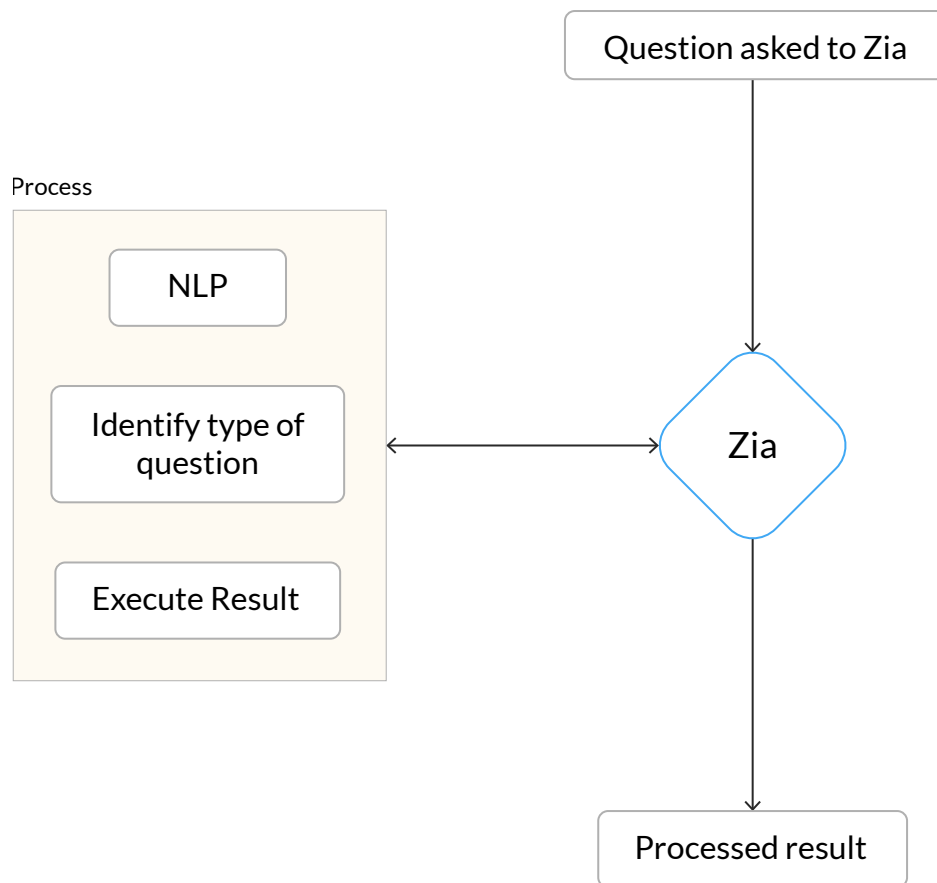
## Ask Zia in Zoho CRM

Zia fetches your data from your CRM upon request. For example, if you say, "Hey Zia, get me the deals closing this month by stage." Zia will retrieve the information for you instantly. Based on what you ask, Zia can fetch data like lists of records, operational answers like sums or averages, dashboard components, globally matching search results, and FAQ answers. You can view the route that Zia used to arrive at the answers provided.

Zia also lets you pre-define skills and set a corresponding trigger action. For example, if you would like Zia to schedule a meeting at a specific time with a specific user, you can pre-configure it using Zia Skills. Now, when you ask Zia to schedule a meeting, the configured Zia Skills suggestion will be displayed, and you can proceed as needed.

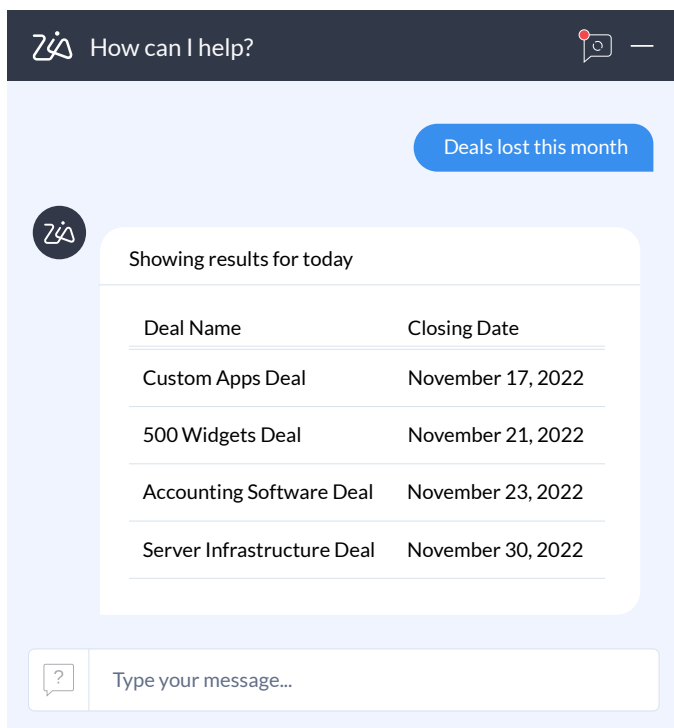
## How it works

The flow diagram below depicts how you can use Ask Zia in Zoho CRM:



## Example scenario

Say you're in the middle of a meeting and quickly need to present your audience with the deals that were lost this month. You can ask Zia to fetch this data and the AI assistant will fetch it for you instantly.



## Bottom line

- ✓ Fetch CRM data by asking Zia
- ✓ Understand data-fetching process

## Resources

To learn more about how to configure Ask Zia in Zoho CRM, please review the documentation below:

- ✓ [Ask Zia - help documentation](#)

# Email intelligence

## Email sentiment analysis

### Why analyze customer sentiment in emails?

You may receive a large number of emails everyday, but the ones that have a negative tone—sometimes even consecutively negative emails—usually require more immediate attention over others. But to identify the emails that need to be prioritized or require immediate attention, you need to analyze your email content fully. The email's subject line may not always indicate what the purpose of the email is. This amount of analysis is a time-consuming affair.

### Email sentiment analysis in Zoho CRM

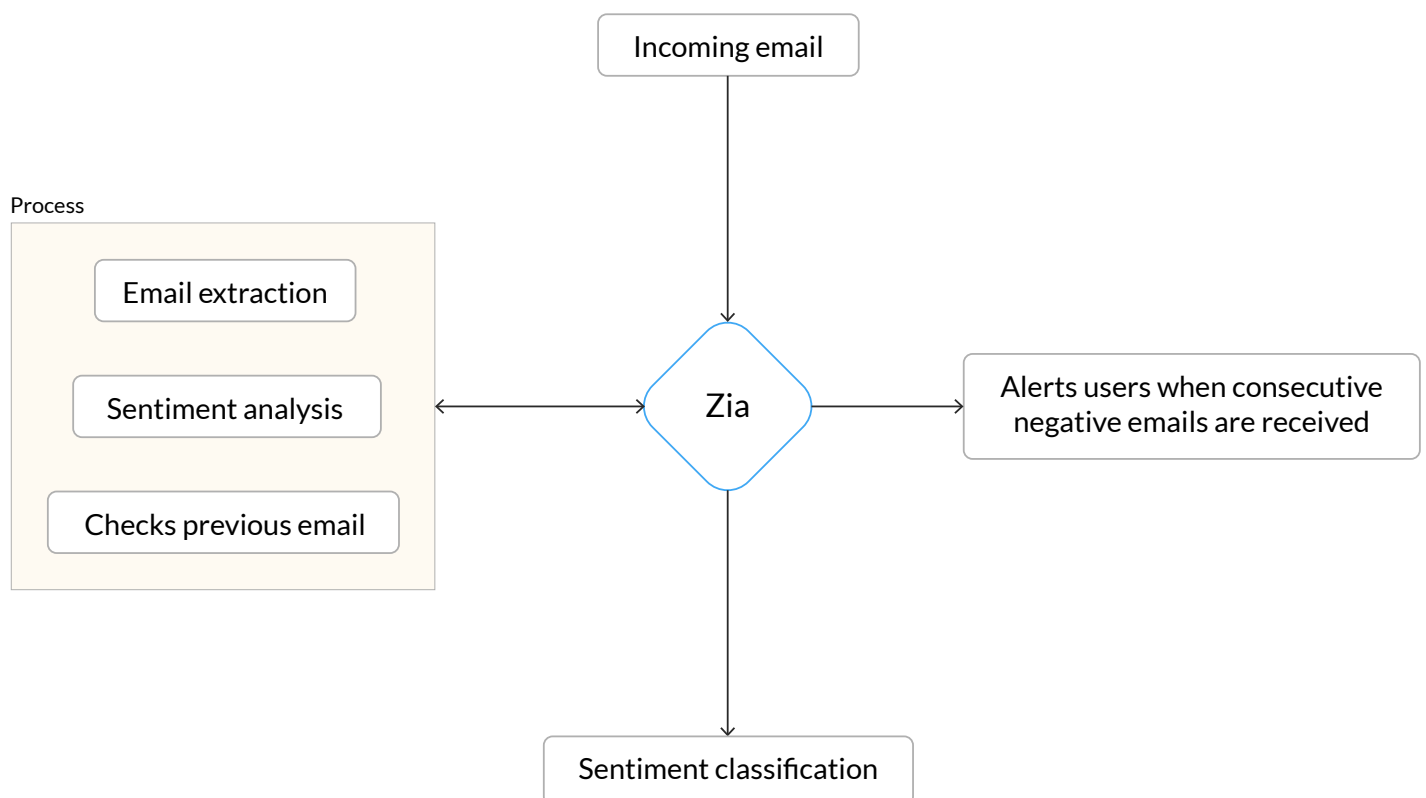
Zia's email sentiment analysis groups your emails into various sentiment categories: positive, negative, and neutral. Emails with a happy tone are grouped under positive, those with an unhappy tone are grouped under negative, and those with both of these traits are grouped under the neutral category.

You're also notified every time a customer sends consecutive negative emails, so you can keep an eye on these customers, take insights from your previous conversations with them, and act accordingly—which could help retain a customer who might otherwise be lost.



## How it works

The flow diagram below depicts how you can use email sentiment analysis and track consecutive negative sentiments in Zoho CRM:



## Example scenario 1

Let's say you've received an email from a customer saying that she had reached out for support regarding an issue in your product, but it's been a long time since she got a response from you. The sentiment of this email is negative since the customer is unhappy with your support. Hence, you should prioritize this customer and quickly attend to her queries.

Search Email Messages...

Mine

☐ **Contacts & Leads** ←  
Thursday

☐ Jeremy Watson 10:40 AM  
Request for Sample Logo Design

☐ Sandra Evans 9:25 AM  
Wow! Great Customer Success

☐ David Williams 9:25 AM  
Demo Request

☒ Carissa Kidman Jan 05  
Unable to import leads

Discontentment
 Complaints

**Unable to import leads**

Carissa Kidman  
To : amelia.burrows@zylker.com

Jan 05 [Reply All](#)


Hello Amelia,

We haven't been able to import leads into our CRM account for a week and had raised a ticket regarding the same with supporting screenshots. But we are yet to get a response to it. Kindly look into this at the earliest and help us resolve the issue. #264793 is the support ticket ID.

Regards,  
Carissa Kidman

## Example scenario 2

Take the previous example where a customer was unsatisfied with the response time from your support. For various reasons, you haven't been able to respond to that customer. The customer then sends three more emails at regular intervals and is on the verge of churning. You now identify this trend and quickly reach out to the customer to resolve her problem.

 Frustration Complaints

< > X

**No response for more than a month**

From : carissa.kidman@chapman.com

To : burrows.amelia@zylker.com

Feb 13 Reply All

Hello Amelia,

It has been more than a month since we had reached out for help regarding issues with importing leads into our CRM account. We reached out to you a couple of days back as well but didn't hear back. While we were genuinely interested in using your product, this has been a frustrating experience for us. We have therefore decided to switch to other alternatives.

Regards,  
Carissa Kidman

## Bottom line

- ✓ Understand customer sentiments in emails
- ✓ Identify consecutive negative sentiments
- ✓ Prioritize customer-related activities

## Resources

To learn more about how to configure email sentiment analysis in Zoho CRM, please review the documentation below:

- ✓ [Email sentiment analysis - help documentation](#)

## Email intent

### Why assess the intent of customer emails?

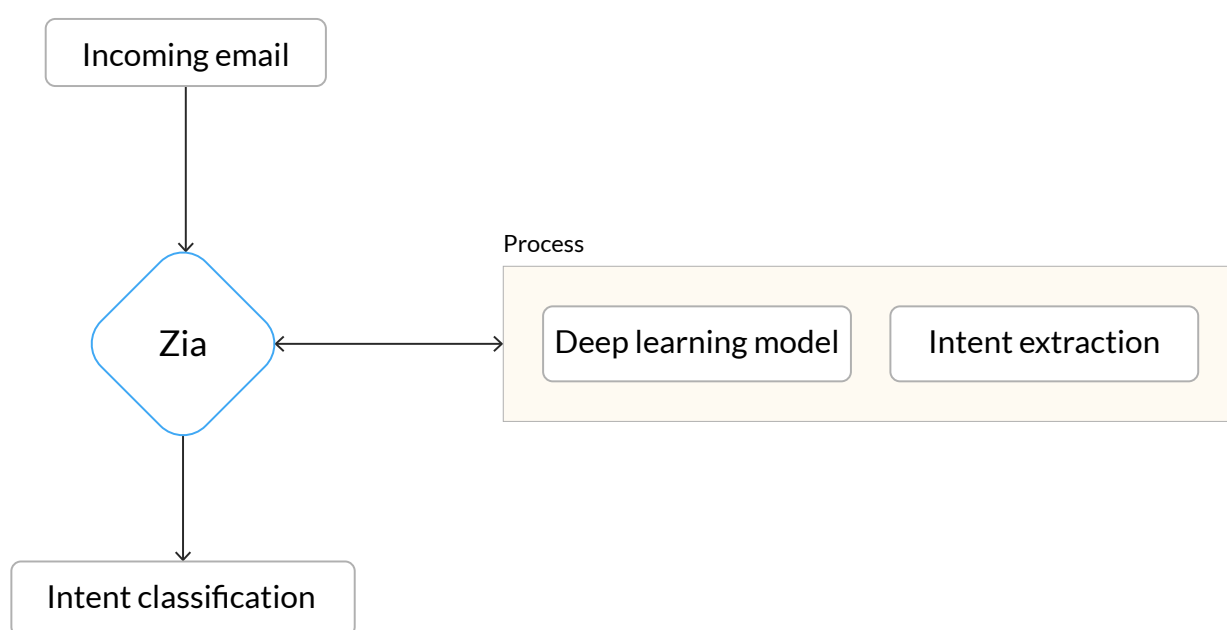
Your customers send you emails for various purposes—sometimes for a query or a complaint about your products and services. Zia helps you understand the intent of your customers through their emails.

### Email intent in Zoho CRM

Based on the content of your customers' emails, Zia will identify the intent of each email as a query, request, complaint, or other.

## How it works

The flow diagram below depicts how you can use email intent assessment in Zoho CRM:



## Example scenario

You receive an email from a customer who wants to upgrade his subscription plan because his company has grown significantly. In this case, he reaches out to you regarding purchasing a higher plan. Zia understands this and classifies the intent of this email as Purchase.

The screenshot displays a Zoho CRM email interface. At the top, there's a header bar with a back arrow, a profile picture of John Doe, his name, and the text 'Last Update : a while ago'. To the right are 'Edit' and a three-dot menu button. The email content is shown in a white box with a grey border. It features a status bar at the top with a smiley face icon, the word 'Happy', and a 'Purchase' button. The subject line is 'Request to upgrade CRM account to a higher plan'. The email body shows the sender 'john.doe@codetwo.com' and the recipient 'burrows.amelia@zylker.com' with a timestamp of '04:44 PM' and a 'Reply' button. The message text reads: 'Hello Amelia, Owing to the expansion and robust growth that CodeTwo has witnessed over the past couple of years, we are in need of more features and capabilities to handle our company's sales processes. We would like to connect with you to explore and understand in detail the most suitable subscription plan which we can upgrade to. Please revert to us so we can proceed further. Regards John Doe'.

## Bottom line

- ✓ Understand intent and purpose of customer emails

## Resources

To learn more about how to configure the email intent feature in Zoho CRM, please review the documentation below:

- ✓ [Email intent - help documentation](#)

## Email emotion analysis

### Why analyze customer emotions in emails?

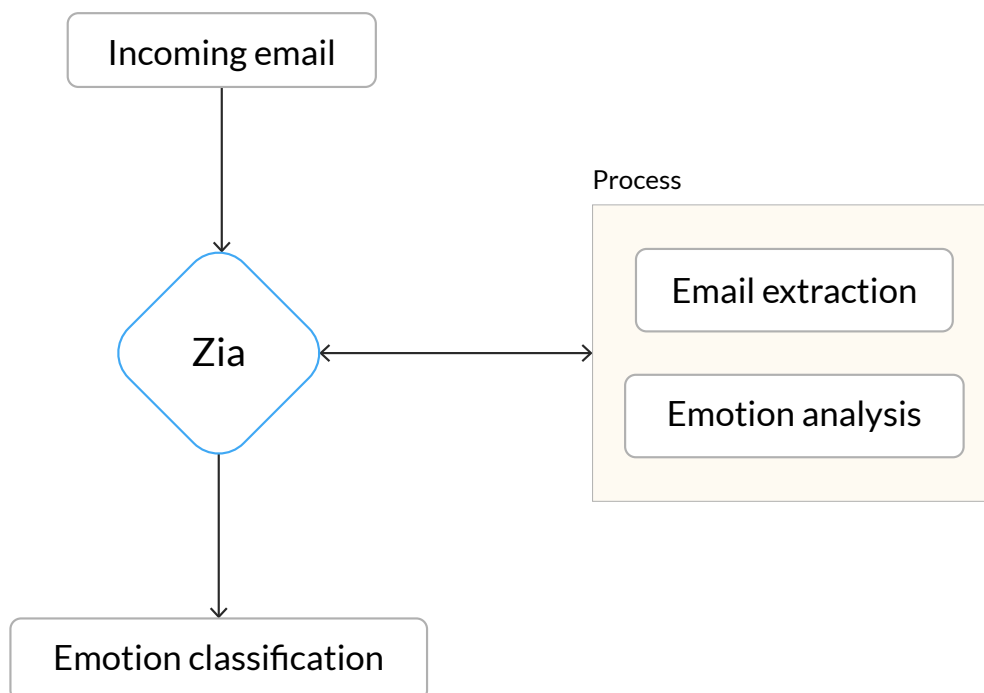
Customers convey various emotions through their emails. They may be happy about your support or frustrated with your product. It's important to understand their emotions to optimize your email prioritization. While the email sentiment feature provides you with the overall tone of your customers' emails, the emotion feature details for you the specific emotions present, both positive and negative, to help you understand the causes of these emotions and subsequent line of actions needed.

### Email emotion analysis in Zoho CRM

Zia is trained to categorize emails based on the emotions expressed within them, such as happy, enthusiastic, grateful, confused, frustrated, discontented, trusting, and neutral. With these classifications, you can identify emails that need your immediate attention and prioritize them.

## How it works

The flow diagram below depicts how you can use email emotion analysis in Zoho CRM:



## Example scenario

You get an email in which a customer expresses enthusiasm about the upcoming email automation upgrades to your product. Zia identifies this emotion and classifies it accordingly. In this case, the marketing team can consider this as high-priority and focus on extending this upgrade to the interested customer.



The screenshot shows a Zoho CRM interface for an email conversation. At the top, there's a header for 'Tresa Sweely' with a back arrow, profile picture, and 'Last Update : a while ago'. To the right are 'Edit' and a menu icon. The email body is displayed in a white box with a grey border. It features a sentiment analysis bar at the top with a smiley face icon, 'Enthusiasm' in a green box, and 'Others' in a grey box. The email text reads: 'Interested in learning more about your upcoming email automation upgrades', followed by a horizontal line, then 'From : tresa.sweely@dltiles.com', 'To : hills.martha@zylker.com', and a timestamp '04:44 PM' with a 'Reply' link. The main body text says 'Hello Martha, We came across Zylker's recent blog post on email automation, in which there was also a mention on your upcoming email automation features. We have been discussing revamping our email automation for a while now and are excited about exploring these upcoming features. Please let us know how we can get in touch with you for further discussions.' It ends with 'Regards Tresa Sweely'.

## Bottom line

- ✓ Identify specific customer emotions based on email content

## Resources

To learn more about how to configure email emotion analysis in Zoho CRM, please review the documentation below:

- ✓ [Email emotion analysis - help documentation](#)

## Activity extraction

### Why extract activities from emails?

Emails contain not only responses and conversational messages, but also information about meetings, calls, and tasks to be performed. Zia can also capture these details so you can take the necessary actions.

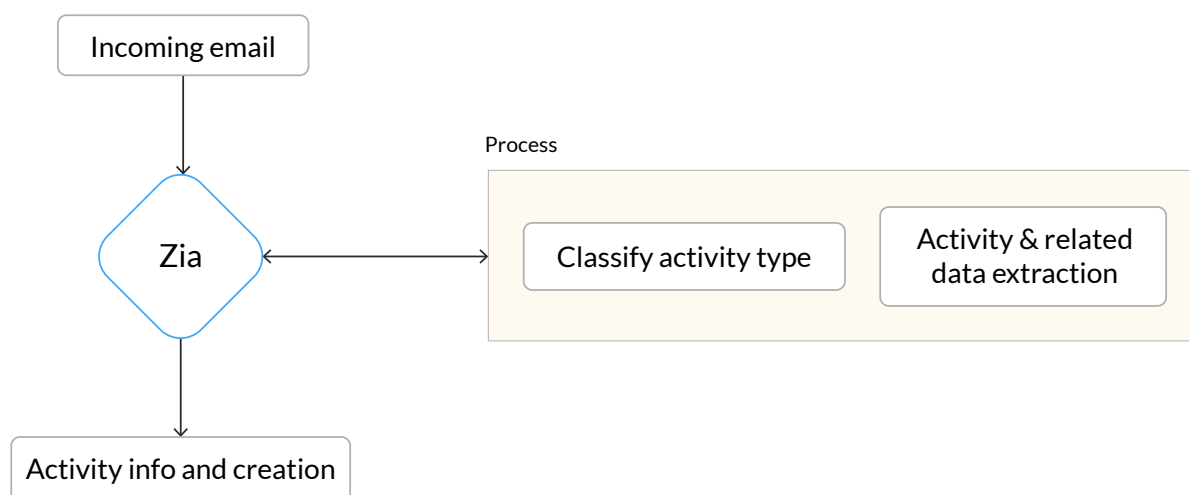
### Activity extraction in Zoho CRM

Rather than going through your customer emails manually to look for information about meetings and tasks, Zia can identify these details from your customer emails and provide you with suggestions to add these activities to your CRM.

Zia can also identify activities as and when they arise instead of you having to open emails manually. You're notified of these activities via the Zia notification panel.

## How it works

The flow diagram below depicts how you can use activity extraction in Zoho CRM:



## Example scenario

You've received an email from a customer who wants to have a call with you to discuss an issue he has faced with your product. You ask him for a suitable time for the call and he responds with one. Zia identifies this information and suggests you to add it as a call activity in your CRM.

**Activity Extraction**

Issue in trial account sign up

From : mitsue.tollner@chemel.com  
To : david.williams@zylker.com

Hi Felix  
Please arrange a meeting tomorrow at 9:00 AM to discuss on the trial account signup issue.

Regards,  
Mitsue Tollner

### Create Call

**Call Information**

Call To: Lead Chemel

Related To: Deal

Call Type: Outbound

Outgoing Call Status: Completed

Call Start Time: 09/08/2022 09:00 AM

Call Duration: 45 minutes 00 seconds

Subject: Outgoing call to Chemel

Cancel Save

**All Notification**

Monday, Aug 8

**Email - Activity Extraction**  
Capture the call available on Aug 09 at 9:00AM from email - Issue in trial account sign up

Friday, Aug 5

**Workflow - Attention**  
66% of your Contacts are without any email follow up for the past 7 days.

**Email - Consecutive Negative Sentiment**  
You have received 2 consecutive negative mails from King Watches  
King Watches

## Bottom line

- ✓ Add activities mentioned in customer emails into CRM

## Resources

To learn more about how to configure activity extraction in Zoho CRM, please review the documentation below:

- ✓ [Activity extraction - help documentation](#)

## Email summary

### Why refer to email summaries?

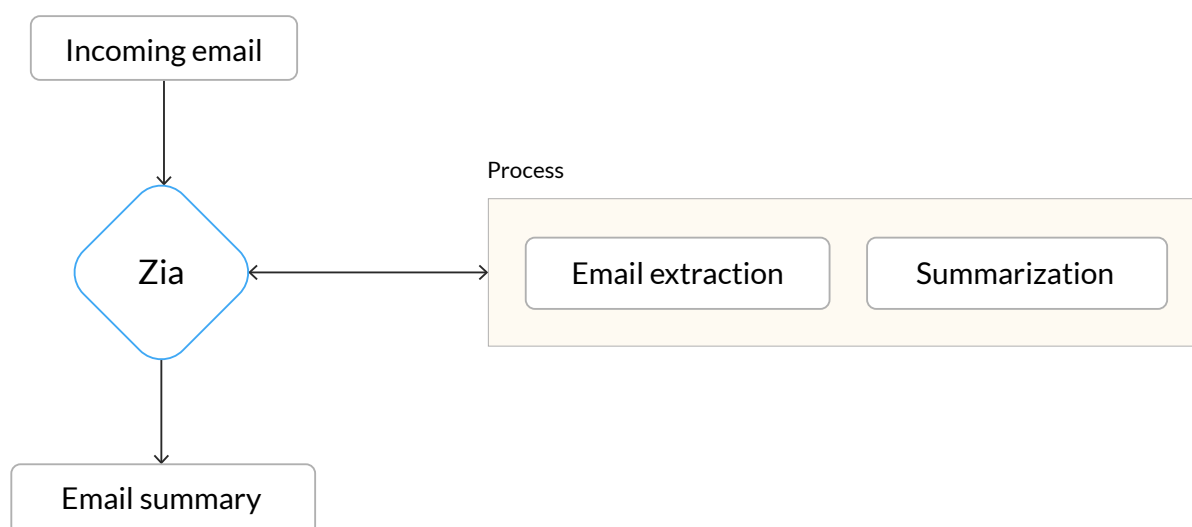
Emails contain lots of content, but the gist of an email might actually be just a couple of lines. Zia helps you identify the gist of your customer emails.

### Email summary in Zoho CRM

The email summary feature automatically summarizes the content of your customer emails and gives you their gist in a single line. You can therefore get an idea of what a particular email is about without opening it. This is super helpful if you're handling a large number of emails.

### How it works

The flow diagram below depicts how you can use the email summary feature in Zoho CRM:



## Example scenario

You receive an email from a customer with a lot of questions about your new pricing plans. In this case, Zia will summarize the content of the email for you in a single line to help you understand that the email is about queries regarding your new pricing plans.

View Summary

Meeting Request

Request to schedule a meeting to discuss new pricing plans

2 Attachments ▾

View Email

Reply ▾

## Bottom line

- ✓ Summarize customer emails

## Resources

To learn more about how to configure the email summary feature in Zoho CRM, please review the documentation below:

- ✓ [Email summary - help documentation](#)

## Competitor alerts

### Why use competitor alerts?

There might be instances when you receive emails from your leads or contacts that mention your competitors. These emails might contain their opinions of your competitors—information which could be crucial for you in order to cater to the needs of these leads or contacts promptly and acquire or retain them. Manually scouring through your emails to find mentions of your competitors is infeasible and tiresome, and there's a chance that you might miss something. Zia's competitor alerts are helpful in these situations.

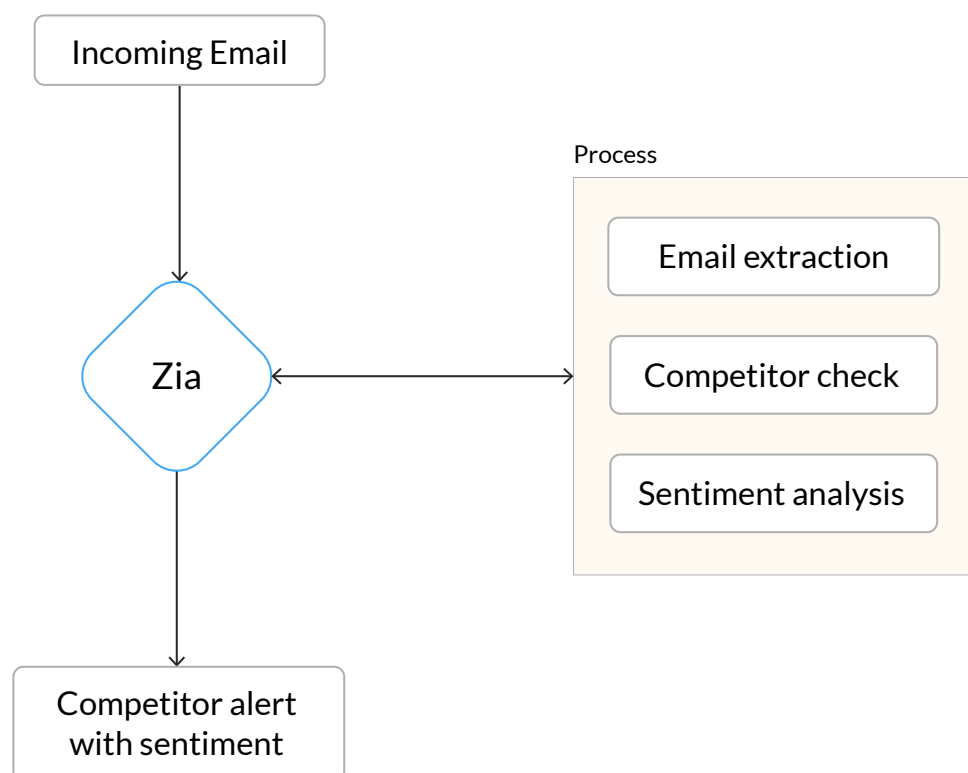
### Competitor alerts in Zoho CRM

The competitor alerts feature notifies your sales reps when your leads or contacts mention your competitors in their emails. Zia can also analyze an email and understand if a customer's sentiment is positive or negative towards a competitor.

Based on these insights, your sales reps can identify leads or contacts that mention your competitors and quickly provide suitable solutions to gain their confidence and avoid churn.

## How it works

The flow diagram below depicts how you can use the competitor alerts feature in Zoho CRM:





## Example scenario

You receive an email from a lead who's interested in buying your product, but the lead mentions that one of your competitors is offering him a similar product with AI features in the same price range.

The screenshot displays the Zoho CRM interface. On the left, a lead card for Kris Marrier (Chemel) is shown with a 'Lead' tag and communication options (Chat, Call, Email). A 'Competitor Alert' notification is visible, mentioning 'Benton' and showing a negative sentiment score of 1. A 'View Email' button is highlighted. On the right, a 'Signals' panel shows the same alert. The main window displays an email titled 'Product Subscription Negotiation' from kris.marrier@chemel.com to lauren.campbell@zylker.com. The email content discusses interest in Chemel's helpdesk software but mentions considering Benton's software due to AI capabilities and price range. The email is dated Nov 12 and has a 'Reply All' option.

**Lead Card:**

- Name: Kris Marrier
- Company: Chemel
- Tag: Lead
- Actions: Chat, Call, Email

**Competitor Alert:**

- Subject: Email - Competitor Alert Nov 12
- Product: Product Subscription Negotiation
- Mentioned: Benton
- Sentiment: 1 (Negative)
- Action: View Email

**Email View:**

**Product Subscription Negotiation**

From : kris.marrier@chemel.com  
To : lauren.campbell@zylker.com

Nov 12 [Reply All](#)

Hello Lauren,

We are impressed with your helpdesk software and we feel it would help us enhance our support activities and provide a great customer experience. But we are also considering **Benton**'s helpdesk software since they provide us with AI capabilities as well for the same price range. We would like to get in touch with you and discuss having AI capabilities as part of our subscription in this price range, based on which we can take a call.

Regards,  
Kris Marrier

Though there's nothing actually negative about your product, the lead has a more positive impression on your competitor's product, which is unfavorable to you. Knowing he has this impression, you can get in touch with the lead and offer the best possible deal.

## Bottom line

- ✓ Automatically extract competitor mentions from emails

## Resources

To learn more about how to configure the competitor alert feature in Zoho CRM, please review the documentation below:

- ✓ [Competitor alert - help documentation](#)

## Autocomplete

### Why use autocomplete?

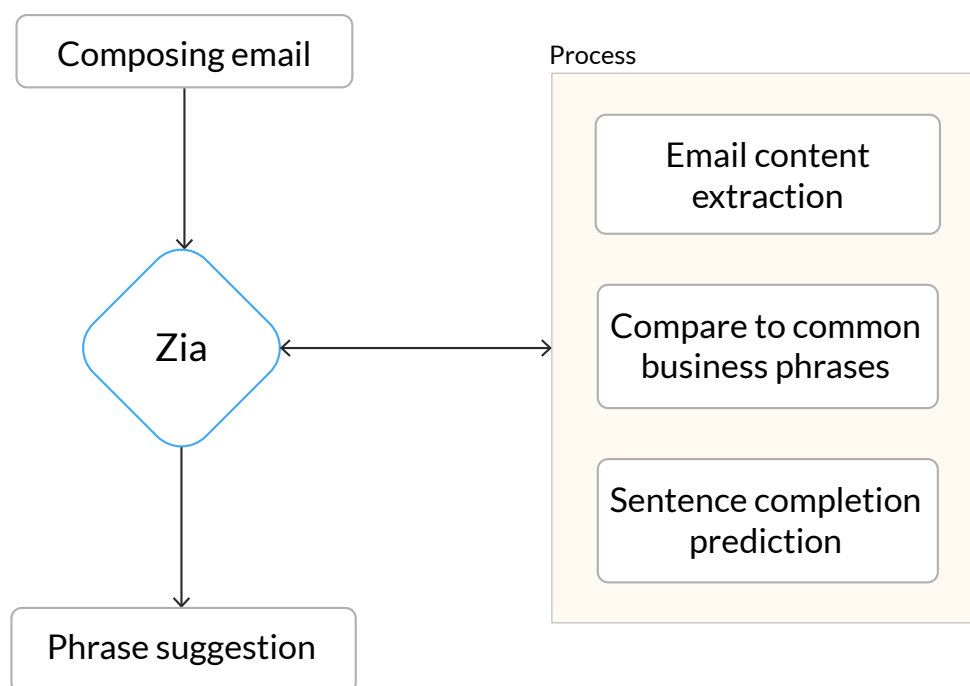
When you compose emails, you may often include content that is common or predictable. For example, if you're starting a sentence with "How", there's a good chance that you might be about to type "How are you?" or something similar. Zia provides you with more convenience by offering relevant phrase suggestions and helps you draft your email faster with the intended content.

### Autocomplete in Zoho CRM

Once you enable Zia and start to draft an email, you'll receive phrase suggestions as you type. You can accept these suggestions or ignore them.


## How it works

The flow diagram below depicts how you can use autocomplete in Zoho CRM:



## Example scenario

You get an email from a customer in which he expresses satisfaction over an issue resolved promptly from your end. You would obviously send a response thanking him. As part of your email, you start typing "It was a". Zia suggests a phrase like, "It was a pleasure talking to you." You can choose to accept the suggestion or ignore it and continue typing your own content.

To Peter Hugh
Subject
<b>B</b> <i>I</i> <u>U</u> <del>S</del> $x_2$ $x^2$ <u>A</u> $\Delta$ $I_x$ 
<p>Thank you for the feedback. Glad to hear that  your issue was resolved satisfactorily. It was a  pleasure talking to you</p>

## Bottom line

- ✓ Receive phrase suggestions during email compose

## Resources

To learn more about how to configure the autocomplete feature in Zoho CRM, please review the documentation below:

- ✓ [Autocomplete - help documentation](#)

# Upcoming AI Features

Zoho CRM has also released several other AI features, which will be included in the next update of this ebook:

[\*\*Zia Presentation\*\*](#) - Auto-generated presentation with business metrics

[\*\*Churn Prediction\*\*](#) - Predict probability of customer churn

[\*\*Strategy Influencer\*\*](#) - Prescriptive and predictive insights on organizational trends

[\*\*Voice of the Customer \(VoC\)\*\*](#) - Holistic insights on customer pulse and outlook derived from multi-channel interactions.

[\*\*Zia Scores\*\*](#) - AI-generated scoring for predicting chances of conversion

[\*\*Email Subject Suggestions\*\*](#) - Suggesting an engaging email subject

[\*\*Custom Intent\*\*](#) - Customize own email intent categories

[\*\*Call Transcription\*\*](#) - Transcribe recorded calls as a text document

[\*\*Call Intelligence\*\*](#) - Auto-detect call sentiment, intent, emotion, and generate call summary

[\*\*Forecast Performance Analysis\*\*](#) - Forecast analytics such as performance trends, gap reasons, improvement suggestions, and more

## **Enhanced Analytics Suggestions for Analytical Components -**

Contextual suggestions to create advanced analytical components, namely: [Cohorts](#), [Quadrants](#), and [Anomaly Detectors](#)

# Enrich your business operations with **Zia**

With its comprehensive AI capabilities, Zia helps you analyze, enrich, and automate a wide range of operations through your Zoho CRM account and ultimately enhance your overall business productivity and yield.

# Contact Us

Are you a Zoho CRM user exploring its AI functionalities?  
We have got you covered. For any help on setting up or using  
Zia capabilities in Zoho CRM, please reach out to  
**[support@zohocrm.com](mailto:support@zohocrm.com)**.

If you are new to Zoho CRM and are looking for a CRM with robust AI  
capabilities, sign up for a free 30-day trial here:

**[SIGN UP FOR FREE](#)**

