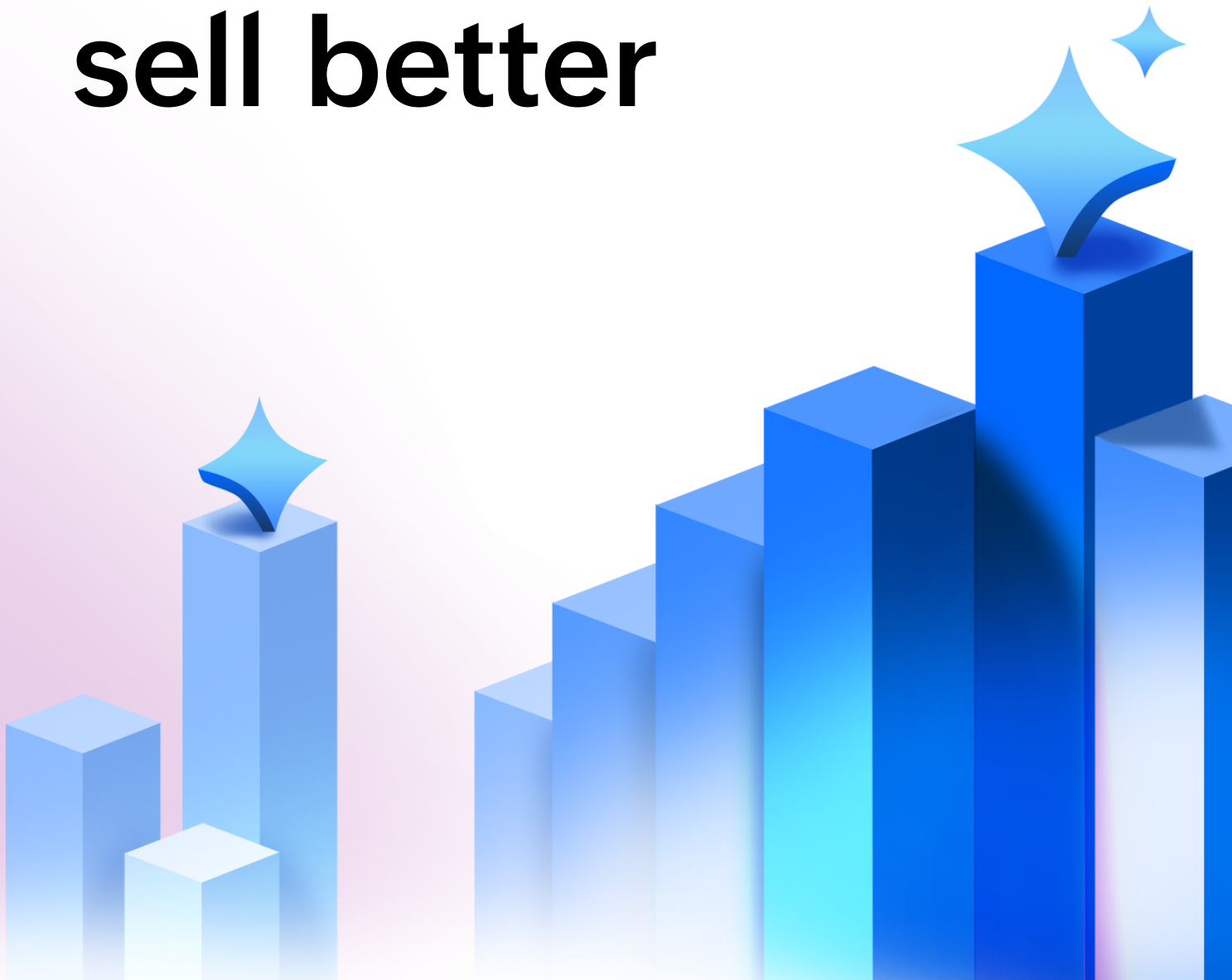


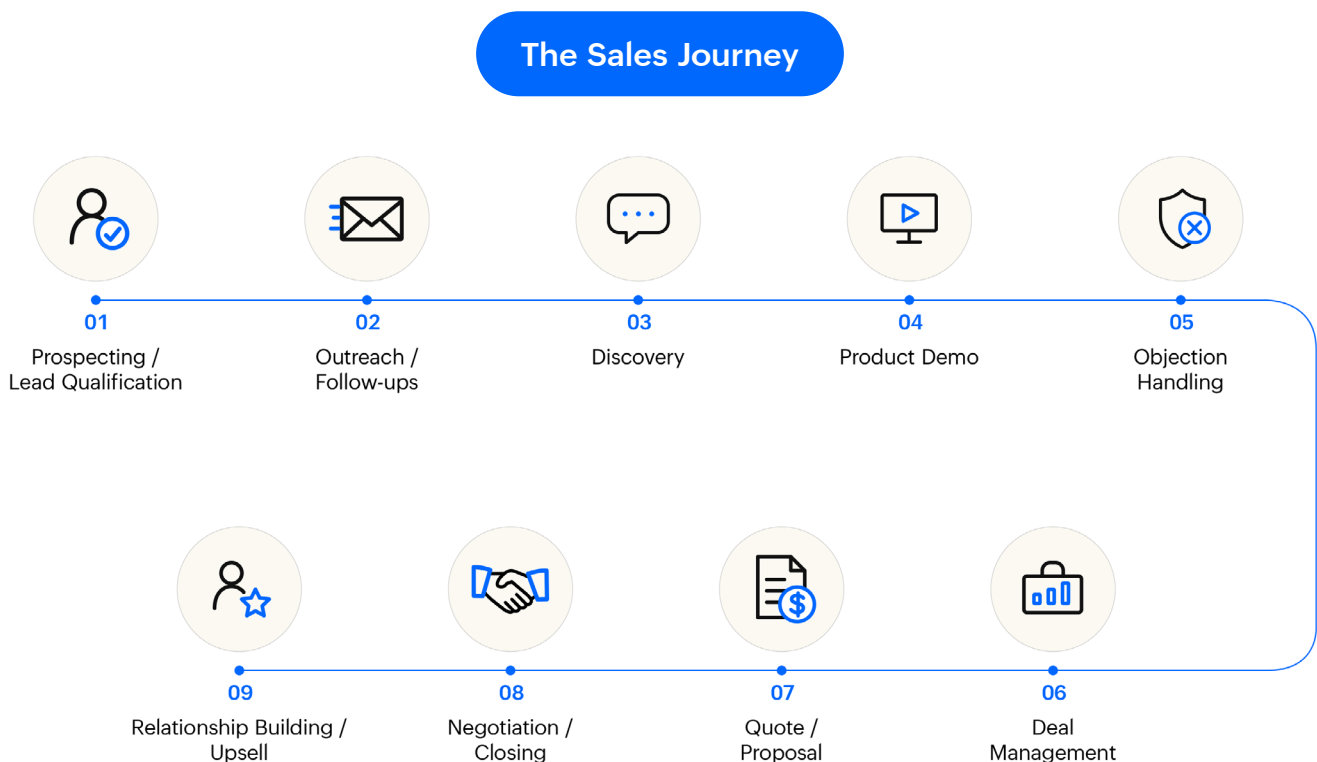
How AI sales coaching helps sales reps sell better



Navigating the ocean of sales

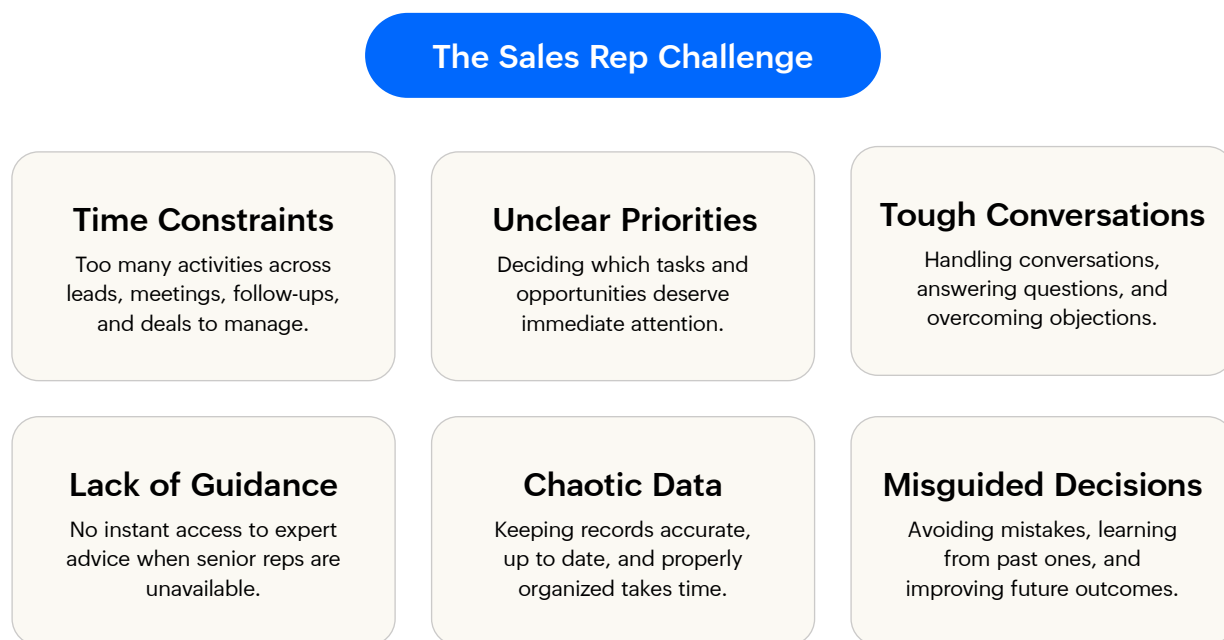
One could say sales reps handle selling, but that would be oversimplifying it. In reality, the sales process involves persistent effort across multiple activities and interactions, from qualifying leads and conducting demos to handling objections, closing deals, and even identifying cross-sell or upsell opportunities, post-sale.

Furthermore, sales processes tend to differ across organizations and industries based on a variety of factors, like business model, target market, product complexity, organizational size and structure, and more. For a basic understanding, let's look at the following illustration to see a general list of tasks that the average sales rep performs:



When sales reps start to drift

Given the complexity of the sales process, it's clear that selling is no easy feat. When handling so many tasks, there are certain challenges that reps might face:



Left unaddressed, these challenges can lead to missed opportunities, deal slippage, ineffective customer conversations, and a poor understanding of customer needs and sentiment. Over time, these issues can diminish customer experience and hinder sales performance.

While these challenges may never disappear entirely, they can be significantly reduced with the right guidance at the right time. It's not just about equipping sales reps with more tools—it's about giving them the knowledge, context, and confidence to make better decisions throughout the sales journey.

That's where effective sales coaching makes all the difference. By providing timely guidance and actionable insights, it empowers sales reps to navigate everyday challenges, improve customer interactions, and consistently achieve better outcomes.

Mastering the ropes with AI sales coaching

AI sales coaching uses AI to equip your sales reps with the knowledge, resources, and insights they need to perform all their sales activities efficiently and accurately. What does Zoho offer with respect to AI sales coaching? And what benefits do sales reps gain from Zoho’s sales coaching offerings? Let’s take a look.

Built-in AI solutions for your straightforward needs

Zoho CRM has many pre-built AI capabilities, powered by Zia, Zoho’s AI assistant. Your reps can gather valuable insights from these capabilities that help them better understand leads and customers. Check out the table to get an idea of how Zia can help coach your reps:

Prepare for customer conversations	Email & call intelligence, voice of the customer
Know the right time and next action	Best time to contact, next best action
Understand the customer faster	Record assistance
Recommend the right solution	Recommendations, similarity recommender
Learn from every interaction	Email & call intelligence, record assistance
Spend more time selling	Record assistance

Let’s explore these Zia capabilities in detail.

Email and call intelligence

Zia can transcribe call recordings and provide useful insights, such as the sentiment, intent, and summary of each call. Similarly, it can provide these sorts of insights when leads or customers reach out via email.

This knowledge will help your sales reps understand how interactions with a certain lead or a customer went, understand their pain points, learn from past deals, and make decisions before reaching out to them.

Call transcription

Preview Call Transcript highlights

Conversation

Benjamin • Agent

Hello Elizabeth. Thank you for reaching out to Zylker Solutions. I'm Benjamin. How can I help you?

Elizabeth • Customer

Hi Benjamin. I had a look at the pricing page of your AI voice-over product and found certain features that align with our requirements. I need some guidance on the best plan that will provide maximum benefits to our business.

Benjamin • Agent

Sure! Can you provide me with a rough number of voice-overs that you might use per month?

Elizabeth • Customer

I'm not quite sure, but I guess we might use around 10-15 voice-overs per month. But the number might vary depending on the collateral requirements and the time needed to create them.

Benjamin • Agent

That should be fine. I'd suggest you start with the standard edition. Based on your load, you can revisit your plan either monthly or annually based on your subscription.

Elizabeth • Customer

Thanks for the suggestion, Benjamin. I'll have another discussion with the team and proceed further.

Benjamin • Agent

Great! Please feel free to reach out to me again whenever you need assistance.

Elizabeth • Customer

Thank you, Benjamin! Will do.

Text Highlight

5

Persons

1

Organization

1

Key Sentence

Call intelligence

Call Intelligence

Sentiment Negative

Emotion Frustration

Intent Complaint

Summary Amelia will connect with Mr. Quinn Rivers at 05:00 PM on a call tomorrow to address his concerns.

Customer Satisfaction Score 79%

Agent Politeness Score 45%

Email intelligence



Frustration

Complaints



No callback for more than a month

From : susan.martin@kingws.com

To : burrows.amelia@zylker.com ☺

[Enrich data](#) ⓘ

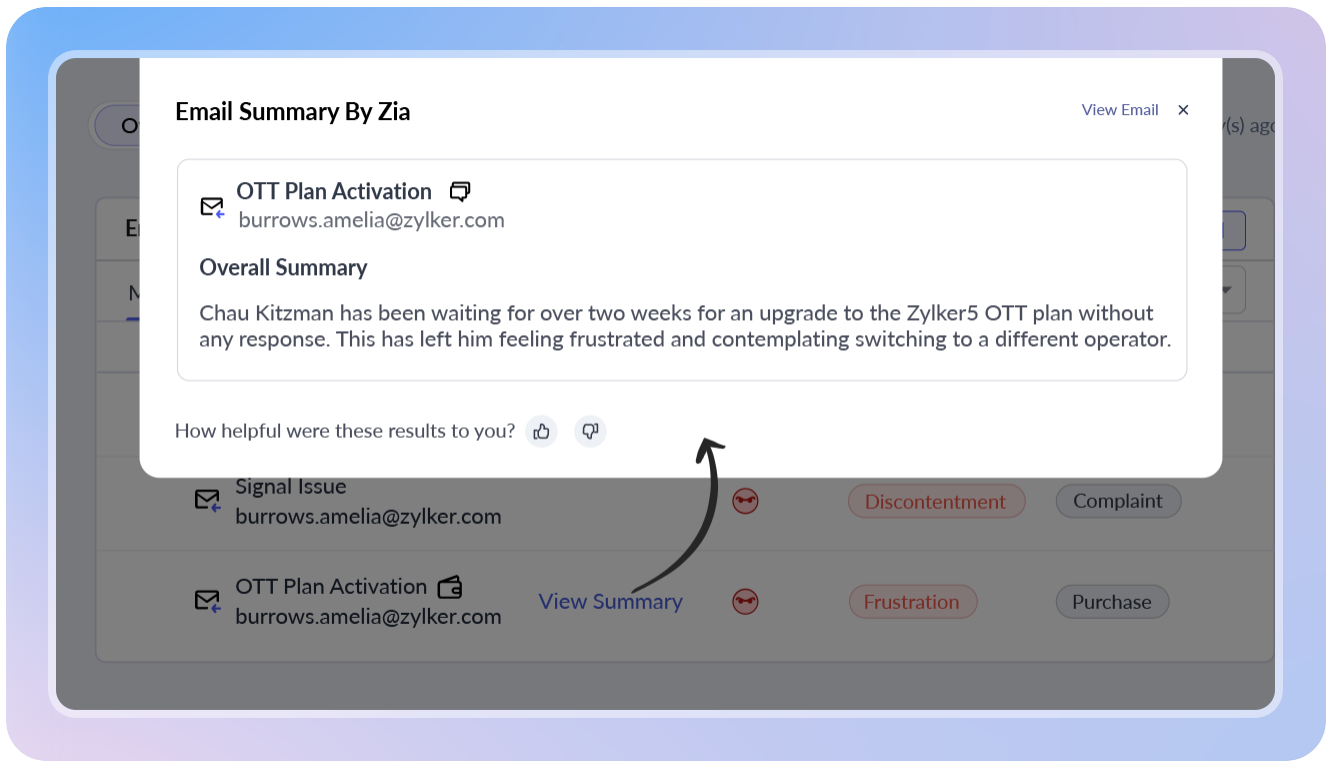
Jan 05 [Reply All](#) ▾

Hello Team Zylker,

It has been more than a month since our request for a meeting with you, and we haven't received a response from your end. We reached out last week as well but didn't hear back. While we were genuinely interested in your product, this has been a rather frustrating experience for us. We have therefore decided to explore other options.

Regards,
King Watches

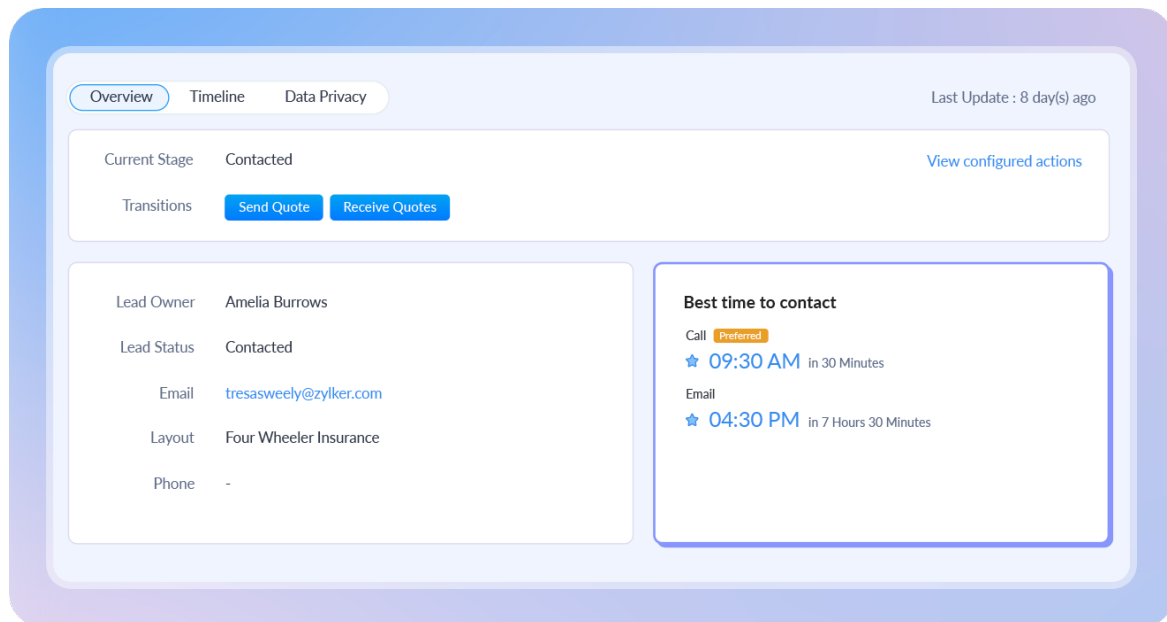
Email summary



Best time to contact

While it's important to educate your sales reps on the intricacies of their interactions with leads and customers, it's equally important for them to know when to interact. Contacting a lead or a customer at an inappropriate time might end up annoying them, damaging your relationship, and—worst case scenario—causing them to leave.

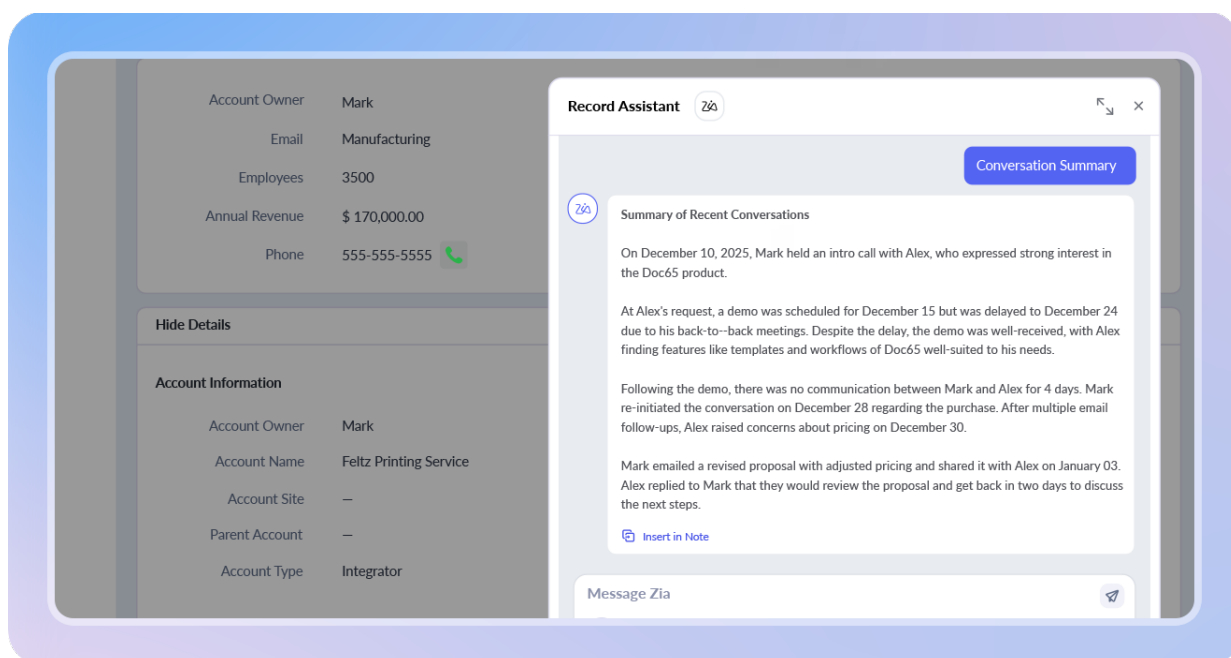
Zia identifies the best time to contact each lead or customer based on their actions, such as when they answer a sales rep's call or reply to an email, as well as how long they take to respond to emails, the time of day they most often reply to emails or take calls. With these insights, sales reps can identify the optimal times to interact with leads and customers.



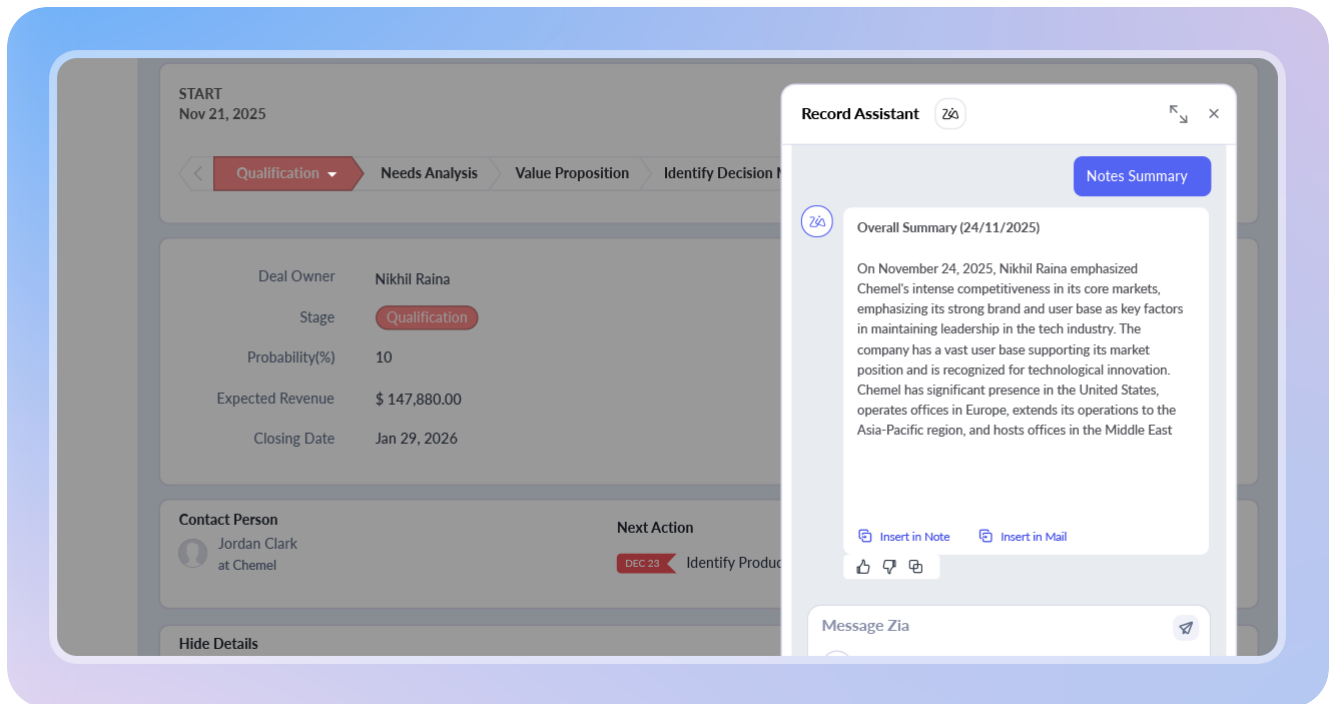
Record assistance

In order to understand leads or customers better, it is important that your sales reps know the context of that particular record in Zoho CRM. Rather than digging through the record and reviewing every detail, Zia can summarize your records, notes, and conversations to make your reps understand the overall gist and engage with leads and customers instantly.

Conversation summary



Notes summary



Recommendation

Zia can analyze past data and customer behavior and suggest relevant products to recommend to them—information that can help enhance cross-sell or upsell opportunities.

Zia can also compare one record with other records present in the module, identify similarities between them, and display the five most similar records as recommendations. Zia 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 similar sale progressed in the past through various stages and implement appropriate measures to ensure the current sale is successfully made.

Zia recommendation

←



James Johnson
Last Update : 2 hour(s) ago

Edit

...

OVERVIEW

TIMELINE

Contact Owner

Ronan

Email

jamesjohnson@zylker.com

Phone

889-435-566

Mobile

889-435-566

Department

Engineering

Best time for - Today



Best time to Call

★

10.00 AM

in 30 minutes

⌵



Best time to Text

★

11.30 AM

in 2 hour(s)

⌵

Finance Details

Ordered Items ▾

Shipments In Progress ▾

Receivables & Payables ▾

Recommendation



First buy

Upscale Condo with 4+ bedrooms

1500-2000 Sqft

Fully Furnished

Similarity recommender

Overview

Timeline

Data Privacy

Last Update : 8 day(s) ago

Current Stage

Contacted

[View configured actions](#)

Transitions

Send Quote

Receive Quotes

Lead Owner

Amelia Burrows

Lead Status

Contacted

Email

tresasweely@zylker.com

Layout

Four Wheeler Insurance

Phone

-

Similar Contacts



Quinn Rivers

Morlong Associates

Similarity Score 60

Why this contact is similar?

Both these contacts have similar deal size and the last purchased product by Mr. Quinn is similar to what Ms. Tresa is interested. Also both these contacts have the same mailing country and similar follow-up patterns.

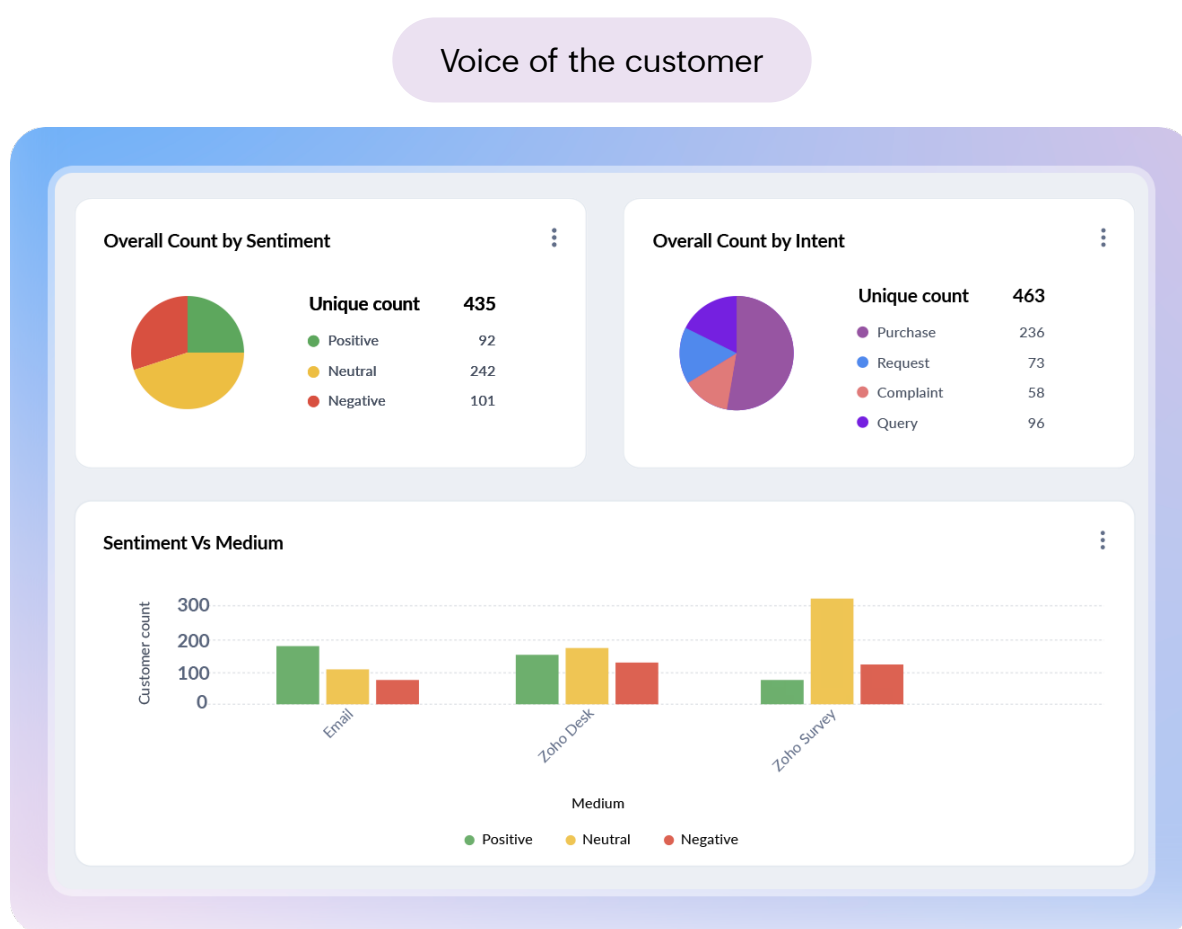
 Zoho CRM

AI for Sales Coaching | 10

Voice of the customer

It's important to gather customer feedback, analyze the data collected, and incorporate appropriate business measures systematically. Zia analyzes customer conversations and deduces what exactly the customers intend to communicate with you.

Zia combines customers' feedback with their profiles and segments them demographically so that reps understand which types of customers have which types of needs. Using these insights, reps can implement appropriate strategies to provide personalized solutions to your customers.

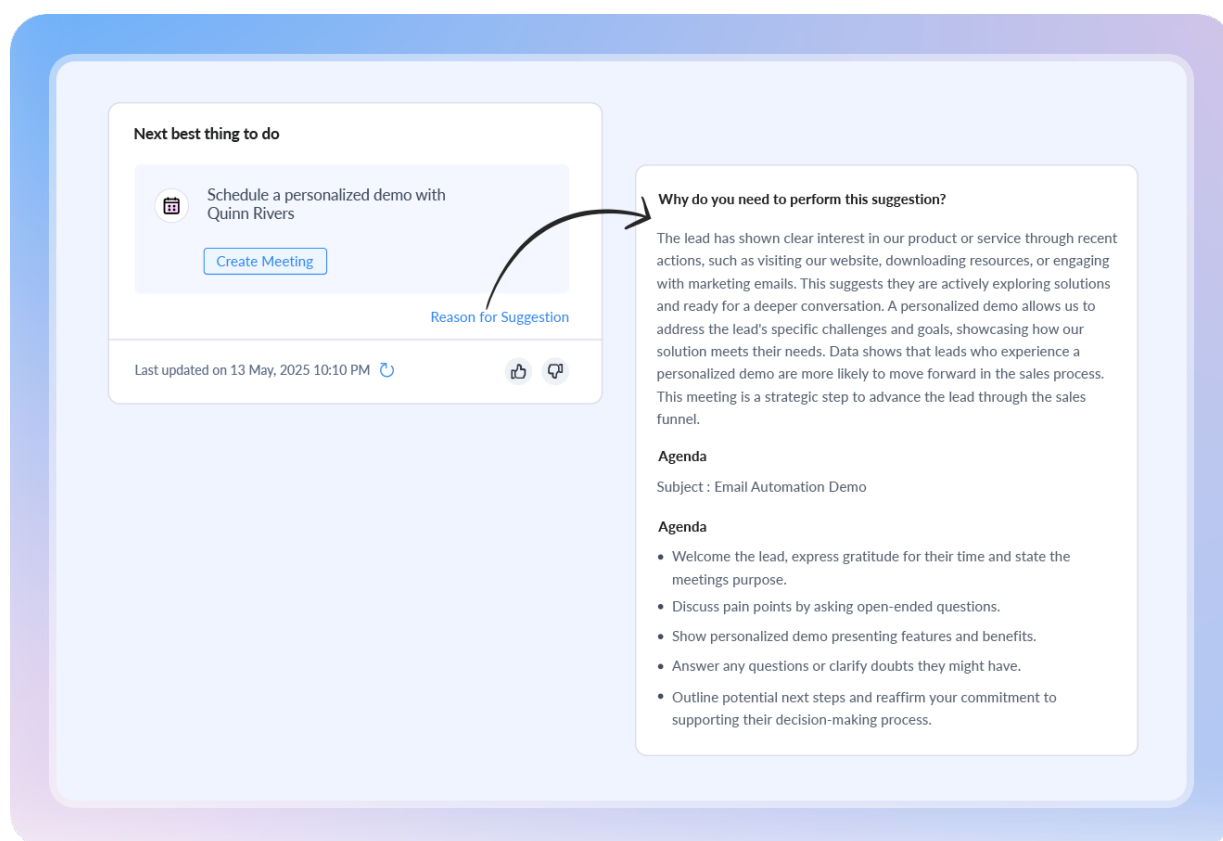


Next best action

Successful sales and retention boils down to the actions that your reps take to address customers' needs. Because every business scenario is unique, it may not always be clear to reps what action they should take to produce a desirable outcome.

This is where Zia's next best action suggestions are helpful. Zia monitors all of your organization's open and active deals, analyzes their deal stages, suggests the next best experience that you can provide, and prompts you to take action. This means your sales reps receive immediate guidance toward what they can do next and proceed with their operations swiftly.

Next best action



SIGN UP FOR ZOHO CRM

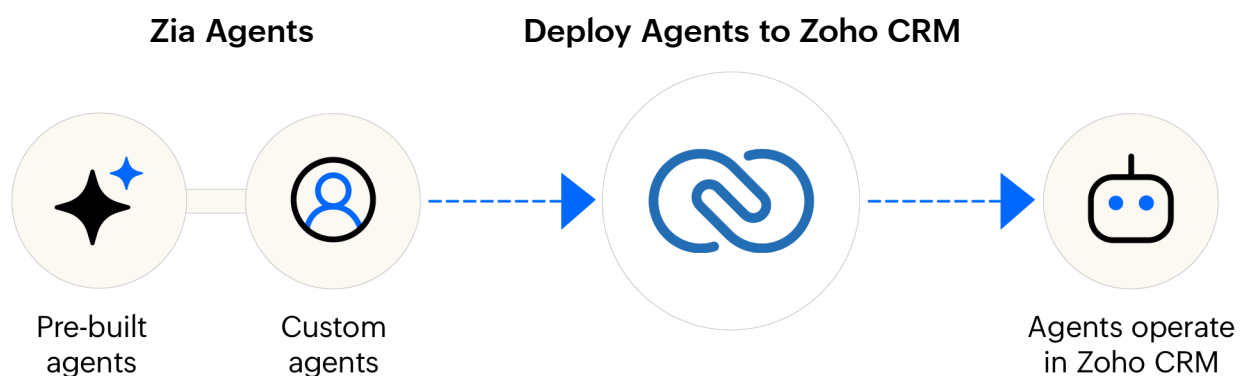
Zia's built-in AI capabilities in Zoho CRM provide your sales reps with timely insights, recommendations, and contextual guidance throughout their day-to-day work. Whether it's understanding customer interactions, identifying the best time to reach out, or recommending the next course of action, these capabilities help reps make informed decisions with confidence.

While these built-in capabilities address many common sales scenarios, some situations demand deeper reasoning, personalized guidance, or business-specific expertise. That's where AI agents come in. Designed to tackle more complex and personalized requirements, they can be tailored to your unique sales processes and coaching needs. And when it comes to agentic AI, Zoho has you covered.

Enter your very own sales coach AI agent

Introduction

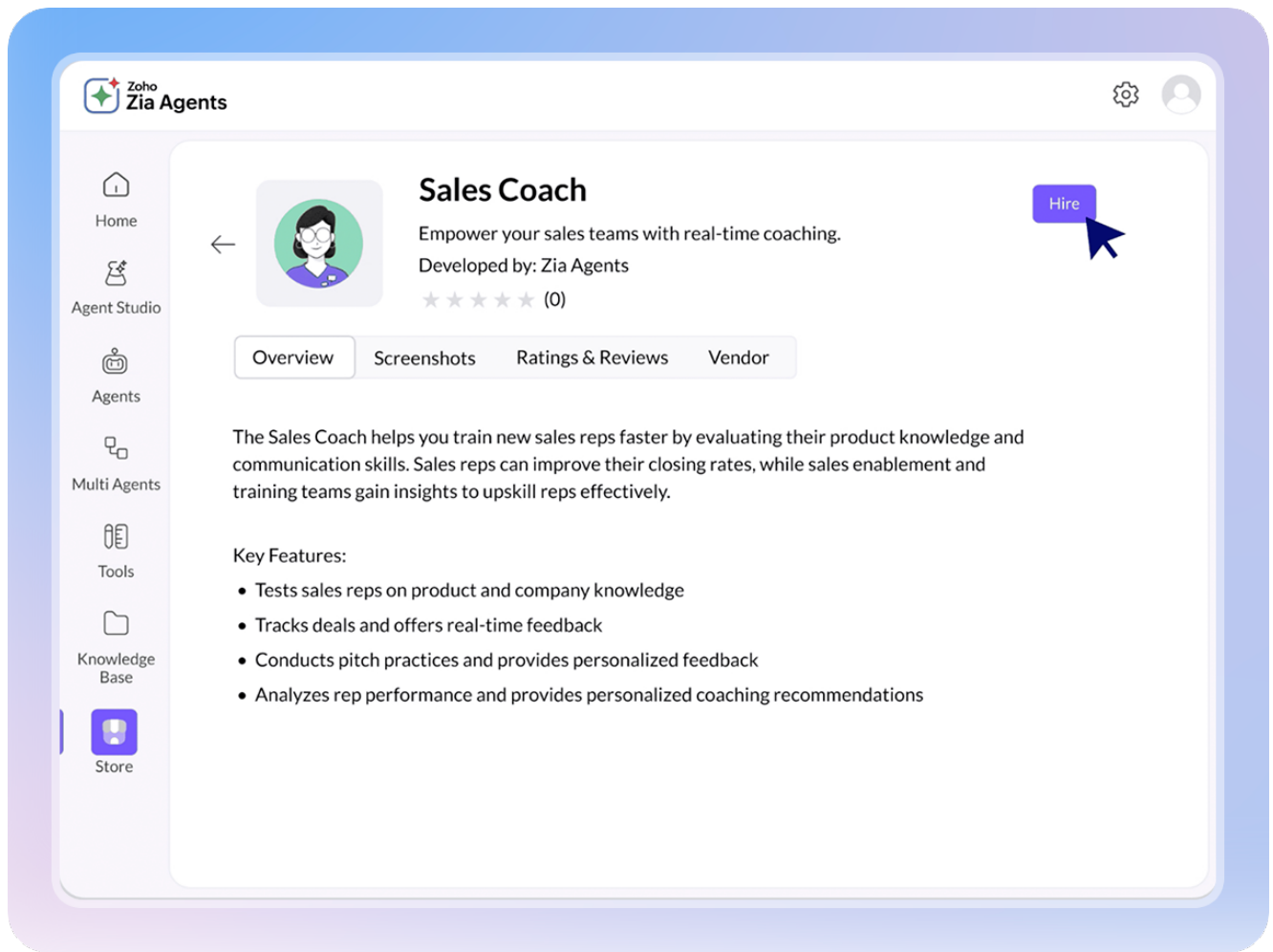
Zoho provides you with its robust agentic AI platform, Zia Agents, to enable you to build and deploy AI agents to Zoho CRM. How can you do this? You can either build your own custom AI agent or choose from pre-built ones available in the Zia Agents platform. Once you're done, you can then deploy and use the agent in your Zoho CRM account.



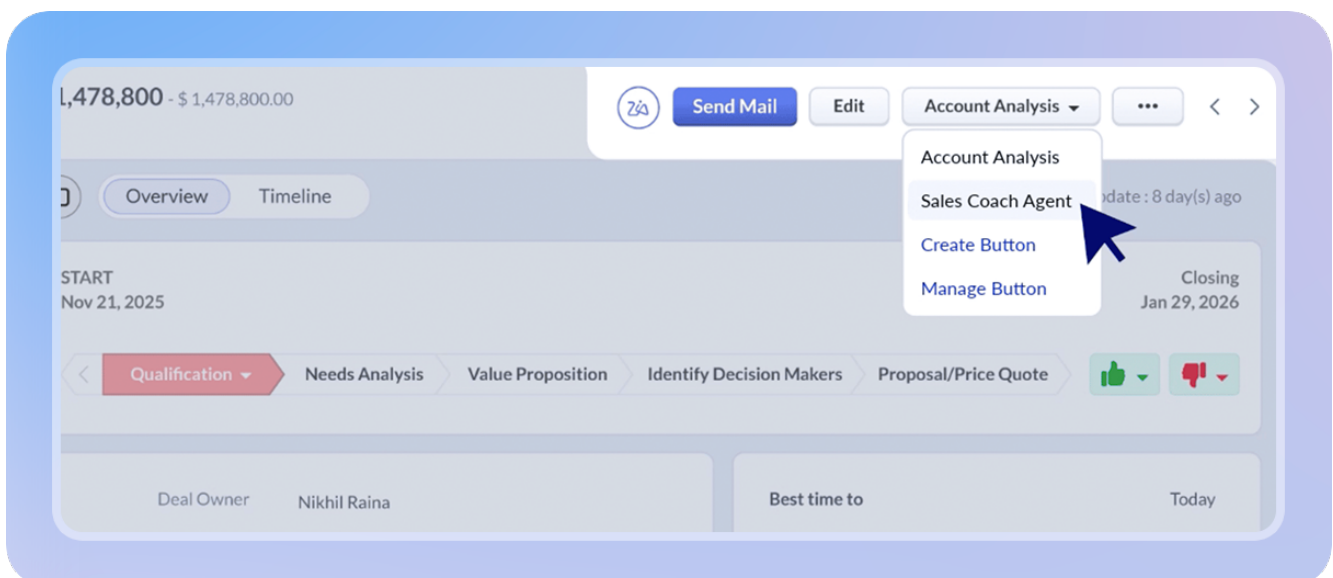
For the purpose of sales coaching, Zia Agents has a pre-built sales coach agent that can provide various insights and train your sales reps to handle leads and customers more effectively.

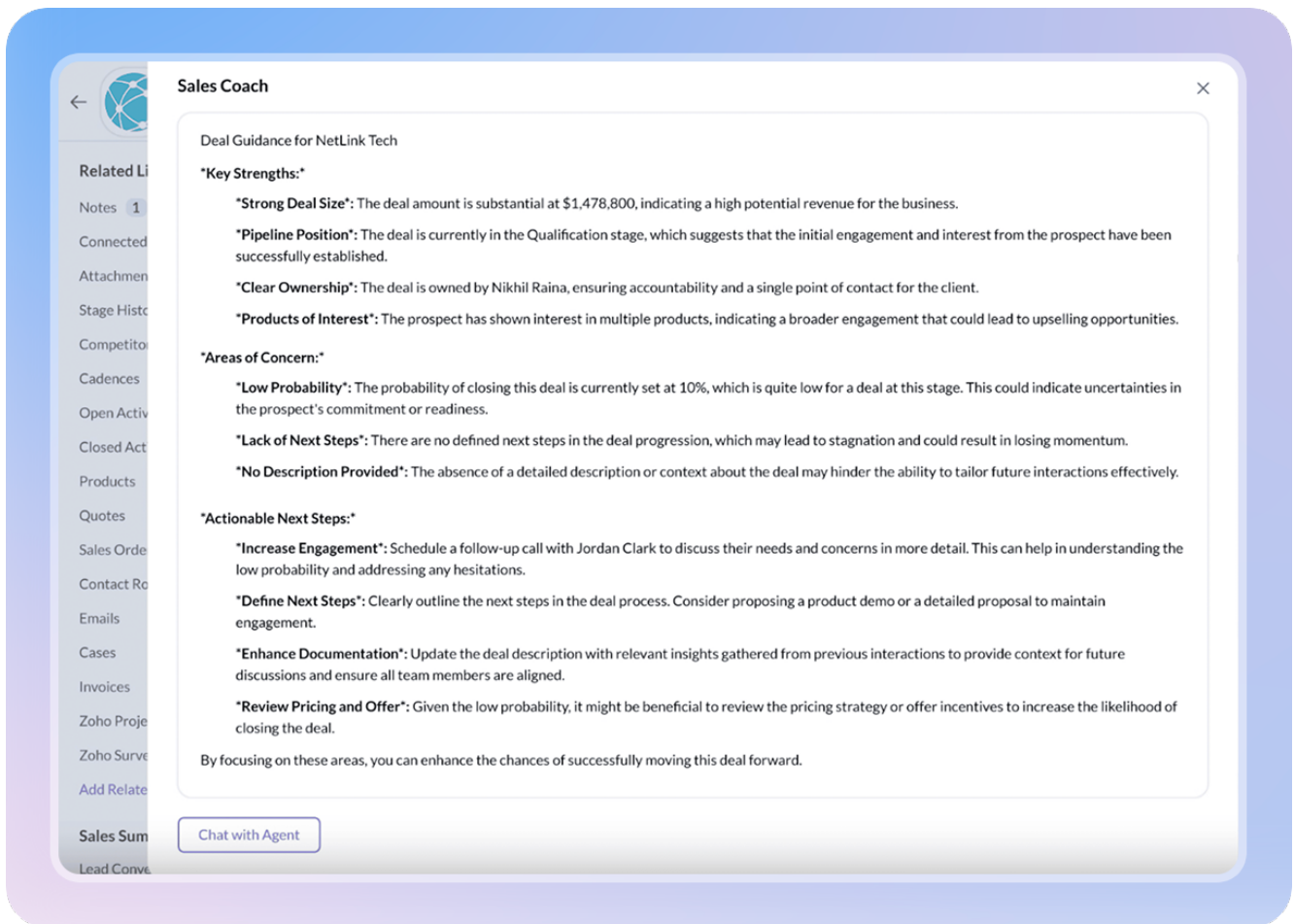
How does it help your sales reps?

The sales coach agent is available as a pre-built agent in the Zia Agents platform that you can directly hire and deploy to Zoho CRM.

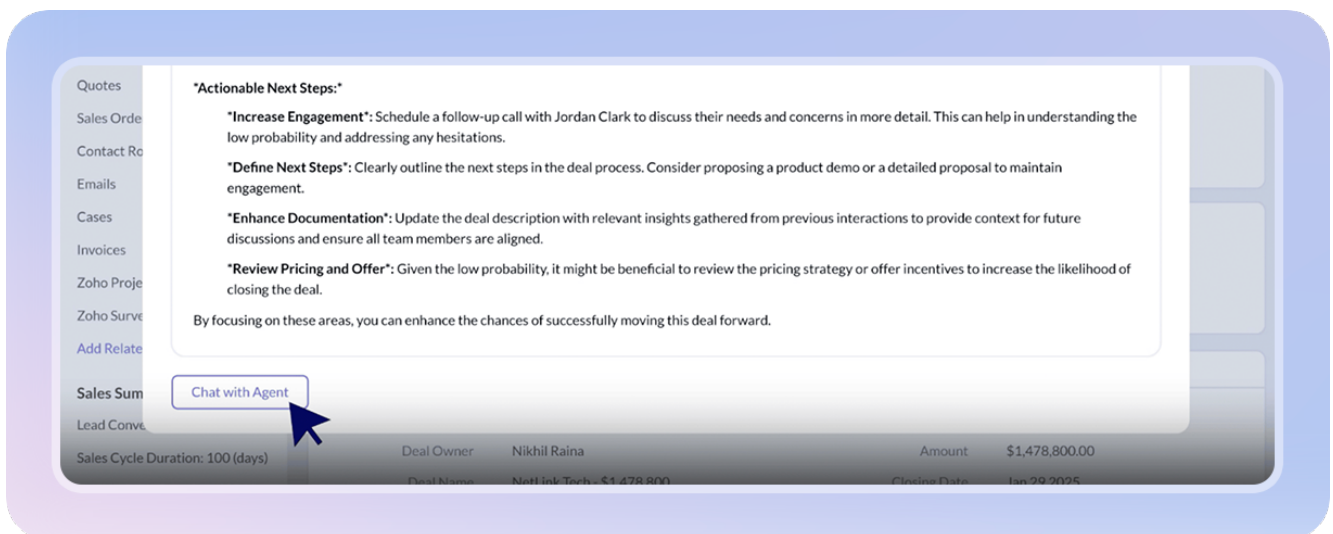


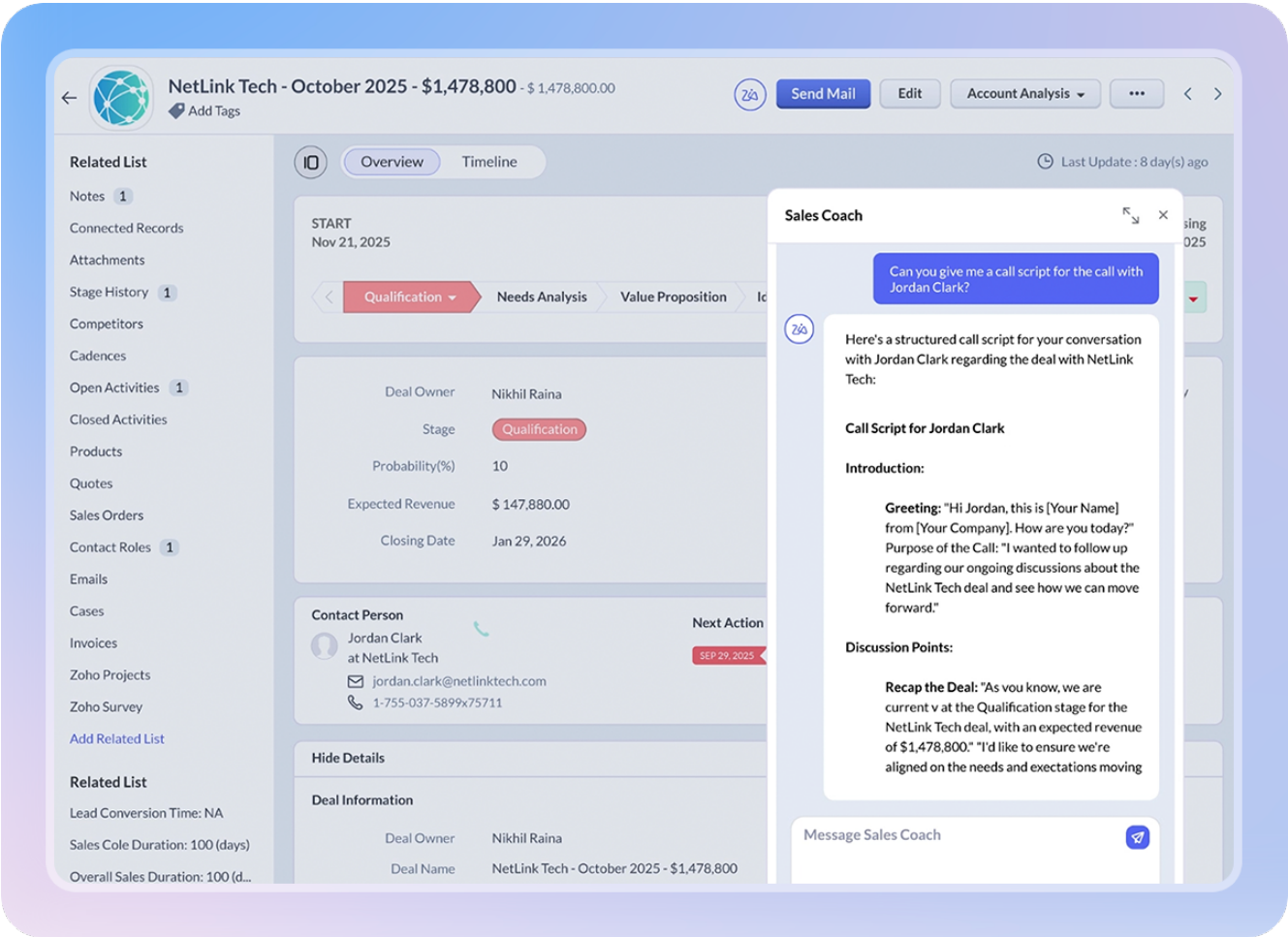
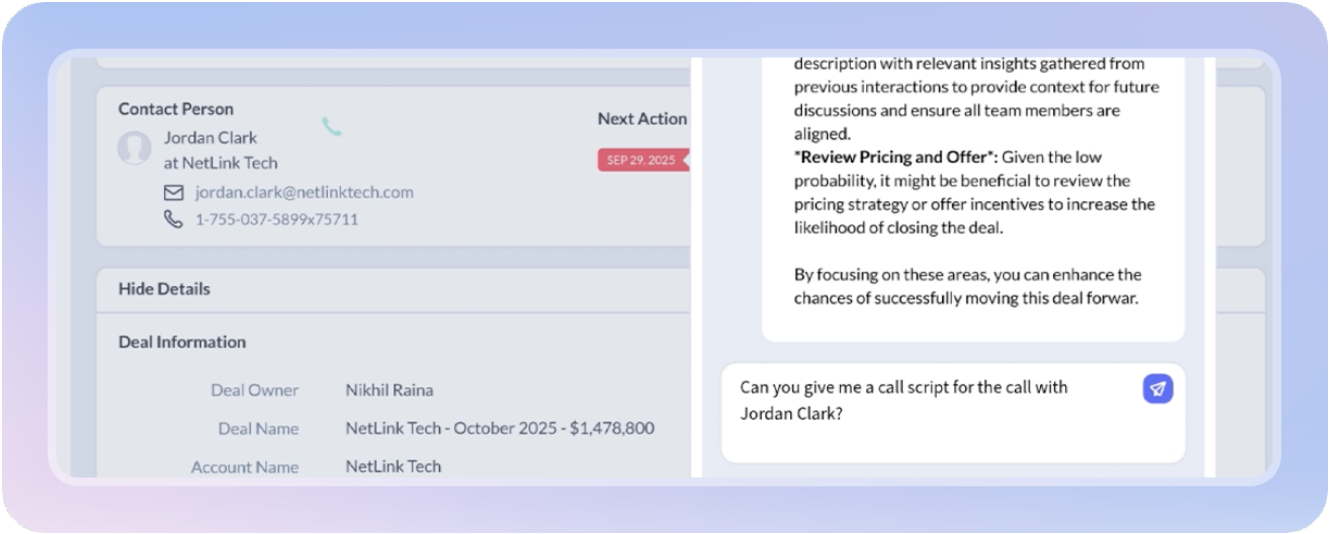
In this case, after deploying to Zoho CRM, when the sales coach agent is initiated, it will provide comprehensive insights on how your sales reps can best handle a particular deal. The sales coach agent analyzes this deal and the lead or customer related to the deal, and provides these insights accordingly.





Your sales reps can also chat with the sales coach agent and ask for specific insights they need on an individual level; the sales coach agent responds with solutions accordingly.





TRY ZIA AGENTS

Charting a smarter course for your sales reps

Sales will continue to evolve, bringing new processes, challenges, and nuances that vary across every lead and customer. Some of these processes can be complex, but they are essential for delivering a seamless buying experience while ensuring every opportunity is handled thoughtfully. Although the scale and complexity of sales operations can seem overwhelming, the difference often lies in how well your sales reps are guided through each stage of the journey.

With sales coaching, your reps gain the confidence, context, and clarity they need to make better decisions. With Zia Agents and Zoho CRM's built-in AI capabilities, you can ensure that sales coaching becomes faster, more accessible, and available exactly when your reps need it.

Ultimately, you have more confident reps, stronger customer conversations, cleaner CRM data, and a sales process that feels less intimidating and more purposeful. Your sales reps are now ready to weather any storm that comes their way!

**Looking to empower your sales reps and
optimize your sales processes?**

**Look no further than Zoho's extensive
AI-powered solutions.**

Contact us at sales@zohocorp.com.

