Guide to Zoho for Mid-Market and Enterprise

Powering global business transformation for over 25 years
Who is Zoho?

Zoho is a comprehensive, global cloud software company that delivers intelligent software built for enterprise growth. Our offerings include an award-winning CRM suite, the industry’s only comprehensive analytics and BI platform, and a powerful low-code development ecosystem.

Why choose Zoho?

Over the last 25 years, Zoho has provided global organizations with the core technologies they need to attract, convert, and retain loyal customers; analyze and forecast business performance; and digitize and scale the unique processes that are key to their success.

From the start, we’ve deepened our product portfolio while holding firm on fair pricing by investing continuously in in-house R&D. This allows Zoho to provide robust functionality without compromising on usability or passing along exorbitant acquisition costs.

Profitable and privately held, Zoho has kept pace with the SaaS industry for decades thanks to our single-minded focus on customer success. Rather than relying on short-term growth strategies, we invest in long-term sustainability and relevance, guided by customer feedback and our dedication to technological innovation.
The principles that guide us

Accountability to our customers
Zoho’s most important stakeholders are our customers, so their continued belief in the work we do is our ultimate metric for success. To ensure we never lose sight of that, Zoho has cultivated robust “Voice of the Customer” initiatives that keep us accountable to our long-term global user base.

Commitment to privacy and security
Data privacy is both a legal issue and a moral one. For every account, GDPR-level privacy policies regarding data ownership, access, and deletion are applied by default. We also ensure that our stringent security protocols are rigorously tested and regularly audited.

Continuous R&D
On average, Zoho invests 60% of its revenue back into research and product development. With a single-minded focus on value and quality, we channel user fees directly into deepening our feature offerings, compounding value year after year.

Deep customizability
From individual UI elements to low-code app development tools, Zoho’s software ecosystem is flexible enough to create a perfect fit for every organization, so no customer has to adjust their workflows to fit the software.
CX Solutions

Build engagement, drive sales, and increase retention with comprehensive CX solutions.

Collaborative sales

Provide your sales teams with the tools to maintain a worldwide operation with our feature-rich and fully scalable CRM.

Intelligent support

Reduce your team’s workload with extensive self-service portals, AI sentiment analysis, and automated ticket assignment.

Integrated CX

Coordinate and execute complex business processes across departments, regions, and verticals, all within a single integrated CX software ecosystem.

zoho.com/enterprise
Expandable, extensible, and fully integrated

Hundreds of integrations with popular third-party apps, along with plug-and-play workflow builders and low-code developer tools, make Zoho’s CX solutions easy to deploy and even easier to customize.

Zoho is being used across the entire company to handle all customer records, leads, sales, etc. With our old CRM system, we found it was a pain to constantly update, and it wasn’t very user-friendly. Zoho has changed that issue. It makes it possible for us to have the most up-to-date information at all times.

- Ashley Gennett, Marketing Coordinator | Cosmo DeNicola Companies

AI-augmented analytics across the entire customer life cycle

- Live, embeddable KPI reports and dashboards
- Multidimensional sales forecasting
- Cross-channel marketing analysis
Business Intelligence

Blend data from 250+ sources—including files, feeds, and cloud or on-prem databases—to generate more actionable interdepartmental insights.

Org-wide data hygiene
Push key datasets such as CRM records or marketing data to Zoho Analytics, clean and enrich the data, and then push it back to your internal systems.

Self-service data visualization
Empower team leads to think like data analysts with custom dashboards, reports, and visualizations, as well as pre-built, industry-specific templates.

AI-augmented insights
Help employees interpret complex information more easily by displaying AI-generated summaries of key takeaways alongside data visualizations.
Built-in data preparation

Zoho’s BI platform is the only offering on the market that includes a built-in, self-service data preparation tool. Increase the accuracy of your business analytics by preparing, cleaning, and enriching all raw data before adding it to your data warehouse.

Analytics is helping us collect data from our company and create analytical reports that help senior management make the best decisions. By knowing deeply how the company is doing, we can make corrections in real time and avoid losses.

-Luis Alcalá, Senior Manager, HR Planning & Talent Management, TruGreen
Custom Solutions

Reduce your IT backlog by simplifying the development process and empowering employees on any team to build secure and sanctioned custom solutions.

Reduce shadow IT

Protect your company data by building all of your key internal tools on a shared, centralized app platform that is managed by your IT team.

Modernize with Digital Process Automation

Automate the flow of tasks and data between all business apps, and orchestrate complex BPA workflows with off-the-shelf templates and endlessly customizable logic.

Build for any device

Fully equipped with IDEs, compilers/interpreters, and mobile SDKs for both Android and iOS, Creator gives developers the tools to create sophisticated mobile solutions.
Extend the life of your legacy systems

Modernize legacy ERP systems by layering Creator on top of inherited code. Quickly launch custom solutions equipped with enterprise-grade data security.

To date, we’ve deployed 46 applications with mobile and web capabilities using Zoho Creator, and when comparing it with other platforms, we realised that we’ve saved $670k.

- Jojo Guingao, Chief Digital Officer - Aboitiz Equity Ventures
Privacy & Security

Privacy as a principle

01  GDPR-level protections are applied to every account, even those located outside of the EU.

02  You own your service data 100%. Zoho processes it only according to your instructions.

03  We have believed in the value of privacy since before it became legally required or morally fashionable.

04  Zoho’s Data Protection Officer and our dedicated privacy team report directly to the CEO.

Secure at every layer

01  ISO 27001, ISO 27017, and ISO 27018 certified

02  SOC 2 Type II compliant in Security, Confidentiality, Processing Integrity, Availability, and Privacy

03  All connections to Zoho servers must use Transport Layer Security (TLS 1.2/1.3) with strong ciphers

04  Data encryption in-transit (TLS with Perfect Forward Secrecy) and at-rest (AES-256)
Your best option across the solution life cycle

- No forced contracts; ability to upgrade and downgrade at will
- Deeply customizable software solutions
- Subscription fees 40-50% lower than the competition
- Greater feature depth included standard within products
- Implementations 30% faster than industry averages
- Pre-integrated product suites for easier setup and maintenance

Salesforce is a major investment, with little value added over what Zoho has to offer.

- Andrew Fish, National Sales Manager | ProGreen International
Proven software backed by deep customer commitment delivered at tremendous value

Scalability and reliability
Zoho for Enterprise reduces the cost of infrastructure, unifies existing apps, and solves complex business problems for increased enterprise fitness, resilience, and scalability.

Customization and extensibility
Through granular customizations and powerful in-house developer platforms, Zoho lets you orchestrate workflows, streamline data management, and deploy world-class solutions at scale.

AI and machine learning
Zia, Zoho’s cross-app, AI-powered business assistant, empowers employees at every level of your organization to streamline their routine tasks, generate powerful, data-driven insights, and take action faster and more confidently.

Enterprise services
Covering data migration, consultation and implementation, our enterprise services team is armed with the product knowledge and industry expertise to meet your unique technical requirements.

Are you ready to transform your organization?
Set up a quick, no-obligation call with one of our business solutions representatives at zoho.com/enterprise