



# 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.



25 +	80M +	150 +	12k +	50 +
Years	Users	Countries	Employees	Apps

## 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.

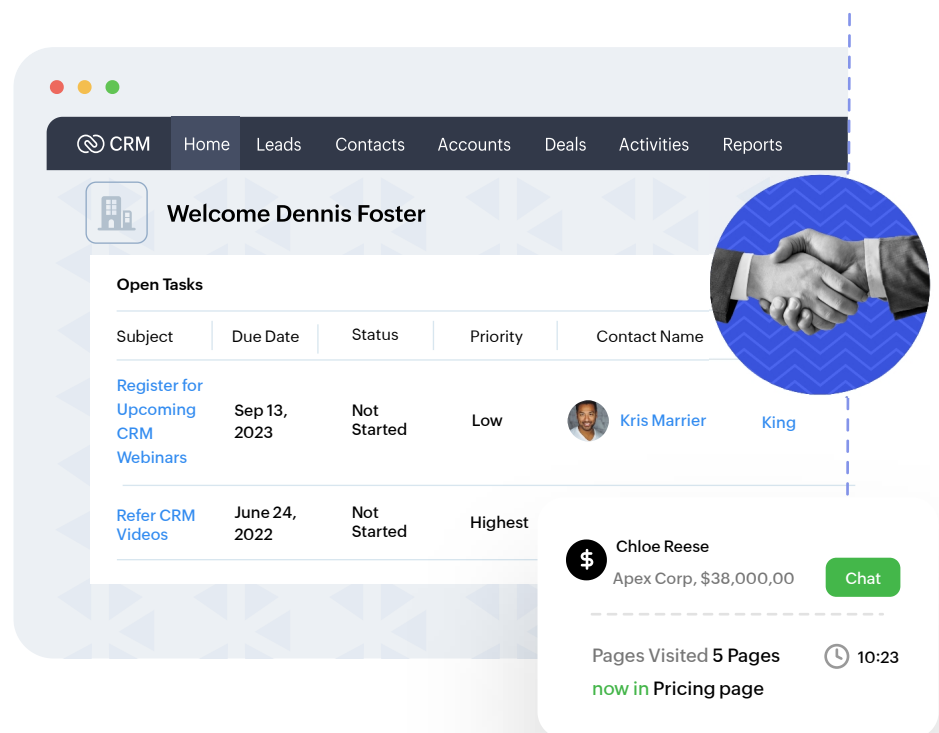
# CX Solutions

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



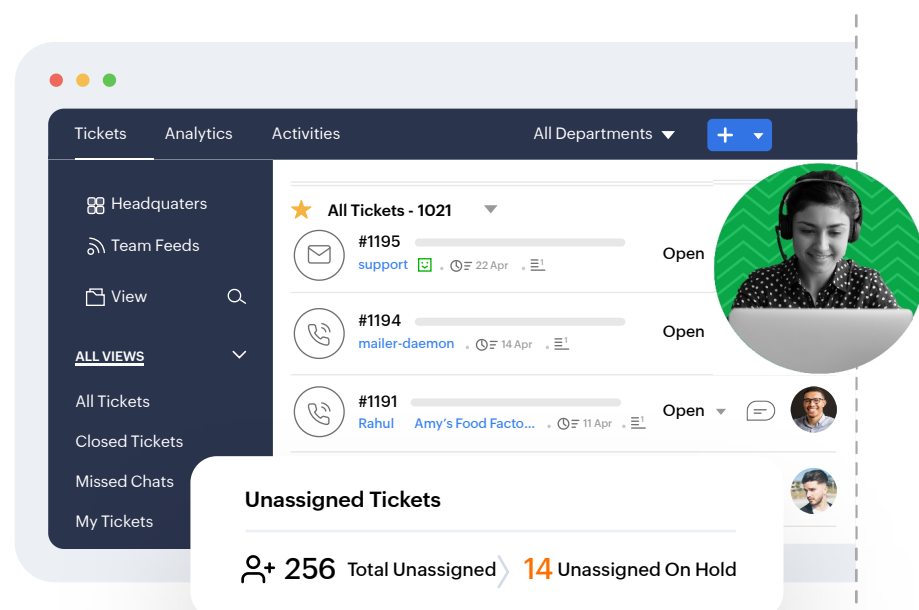
## Collaborative sales

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



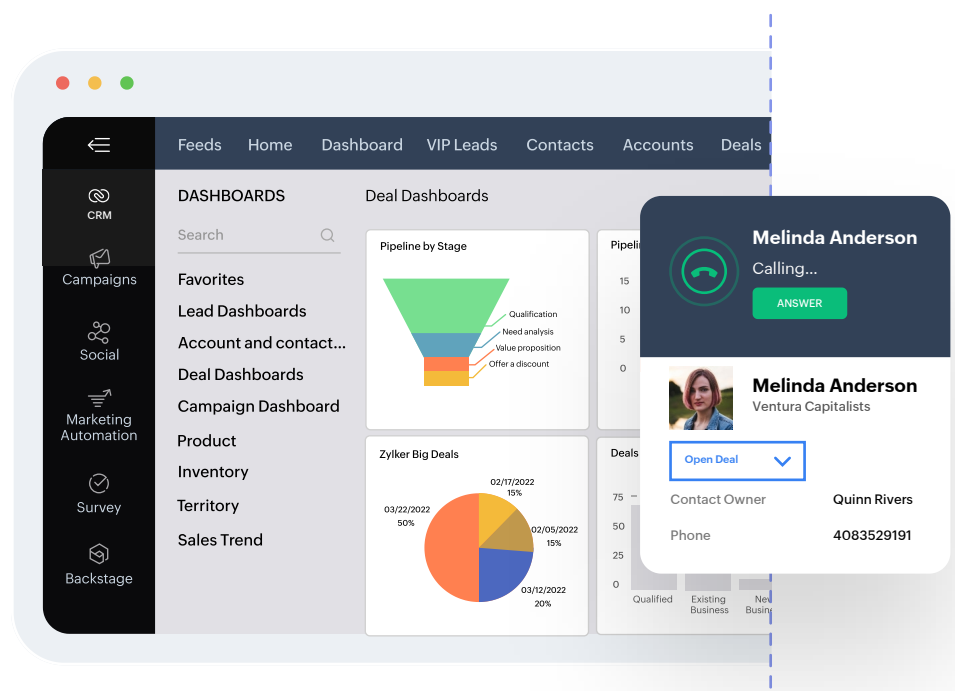
## Intelligent support

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.





## 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

## Native AI analytics across the entire customer life cycle



Live, embeddable KPI reports and dashboards



Multidimensional sales forecasting



Cross-channel marketing analysis

## Improved customer communication powered by **ChatGPT**

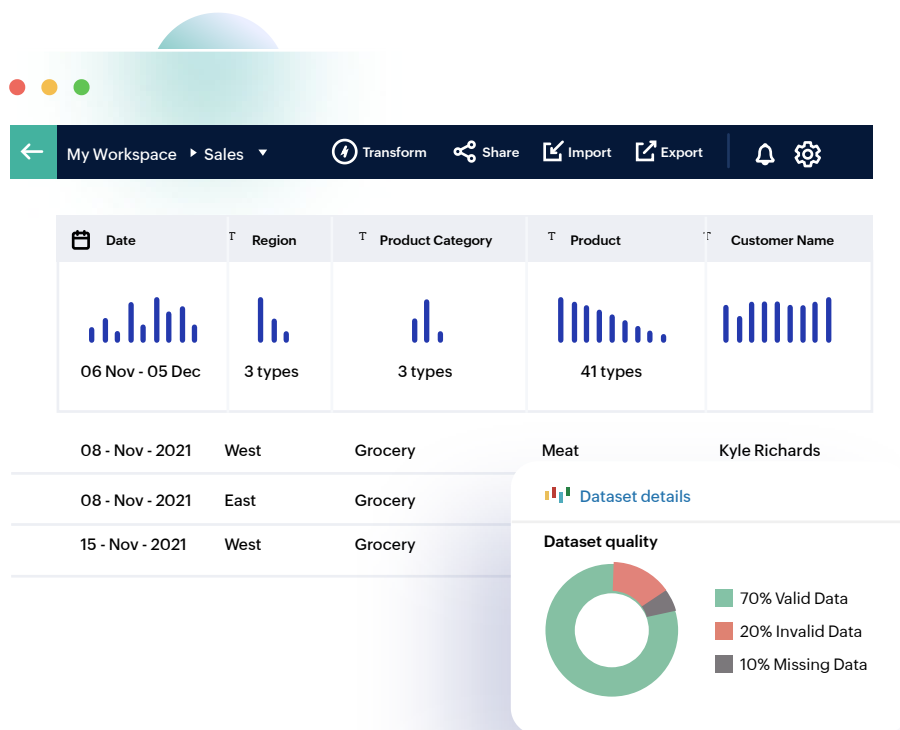
Leverage ChatGPT from right inside your CRM. Nurture your lead pipeline with high-quality, AI-generated email communication, ensuring quicker, more reliable engagement for every deal.

HYATT



# Business Intelligence

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

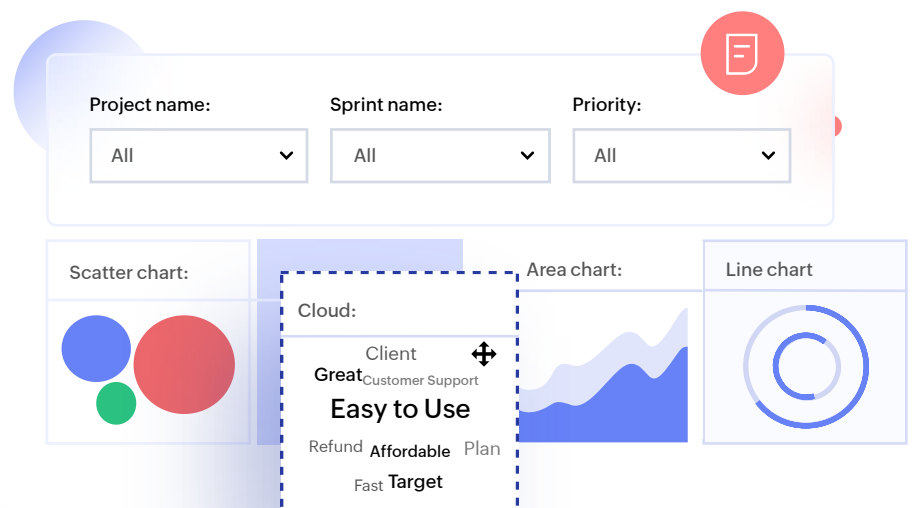
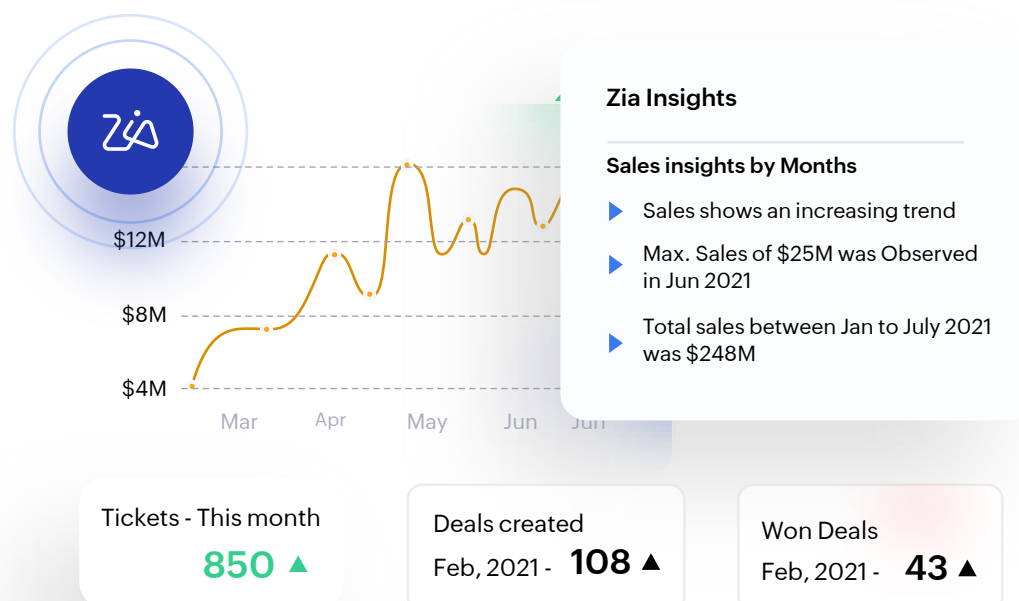


## Org-wide data hygiene

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.



### Start analyzing your data today, with help from ChatGPT

Zoho Analytics integrates seamlessly with ChatGPT to augment your analytics journey. Whether you're pulling datasets from the public web, generating formulas and SQL queries, or mapping custom fields during import, get the job done faster with Zoho's ChatGPT-integrated AI assistant.



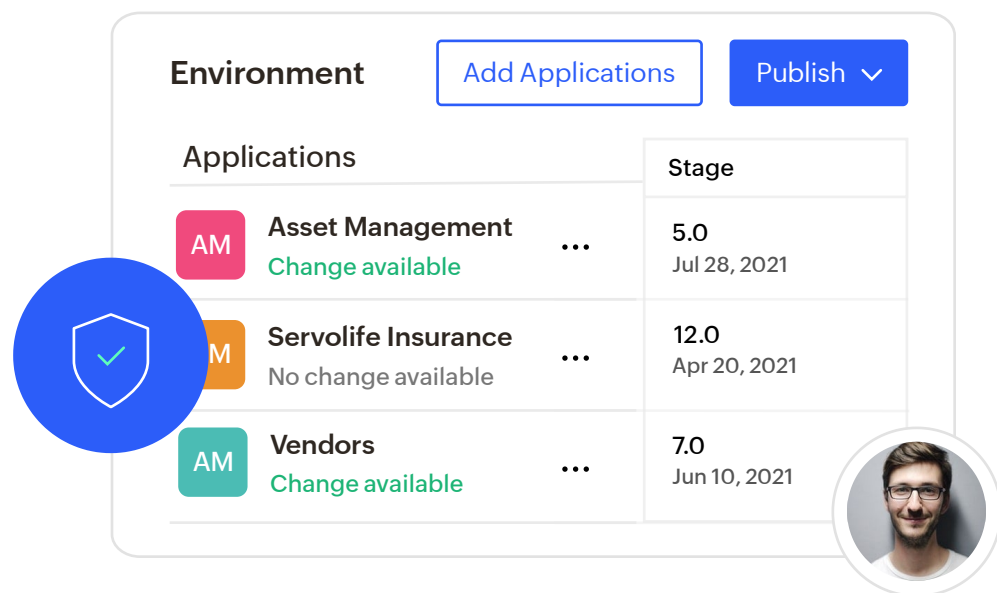
Analytics is helping us collect data from our company and create analytical reports that help senior management make the best decisions. By knowing deeply how the company is doing, we can make corrections in real time and avoid losses.

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



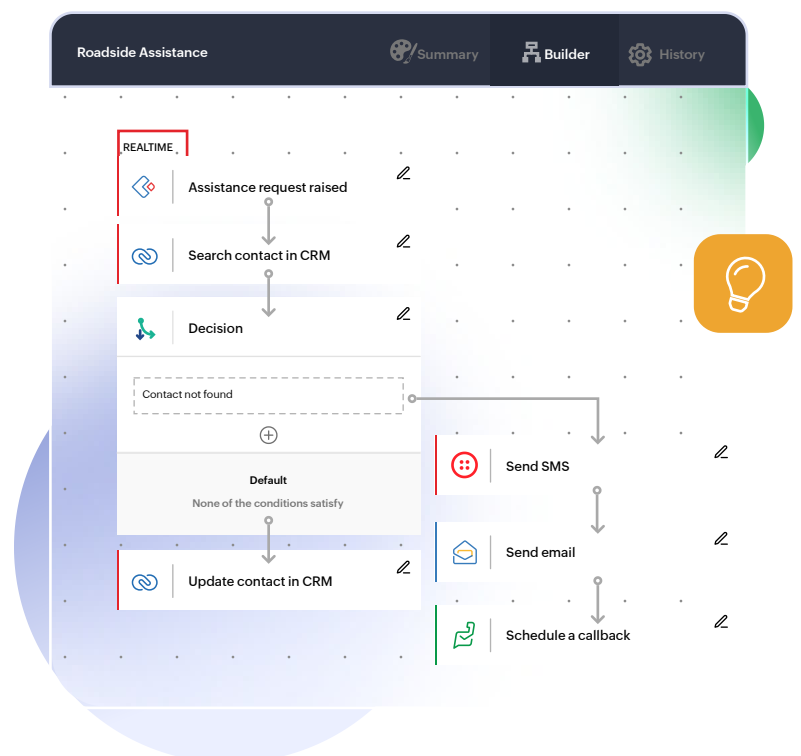
# Custom Solutions

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.

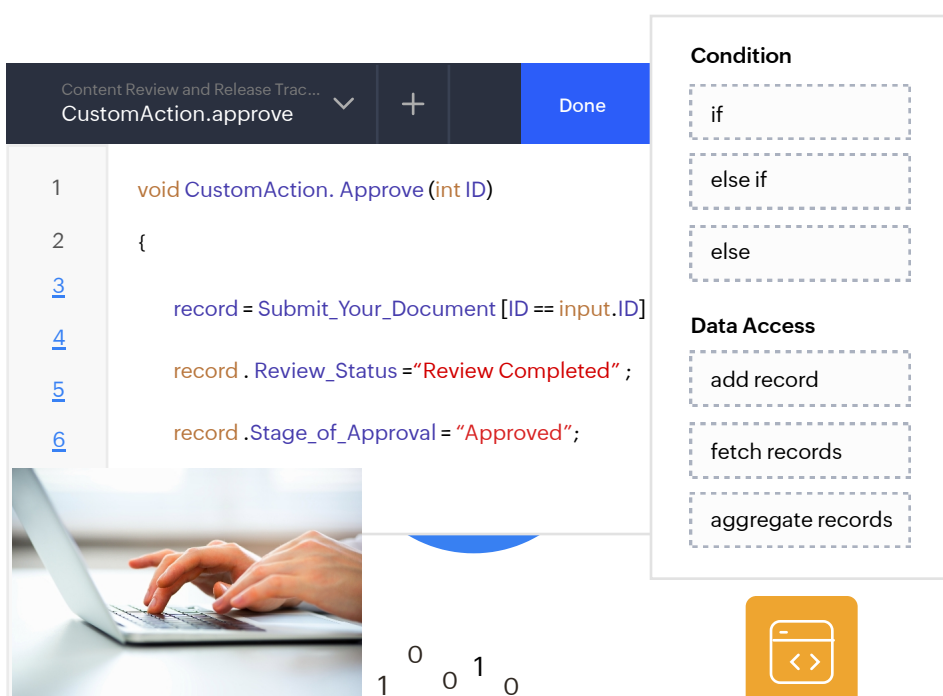


## Build for any device

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

## 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.





## 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

amazon



Marriott

COMCAST

audible

lyft

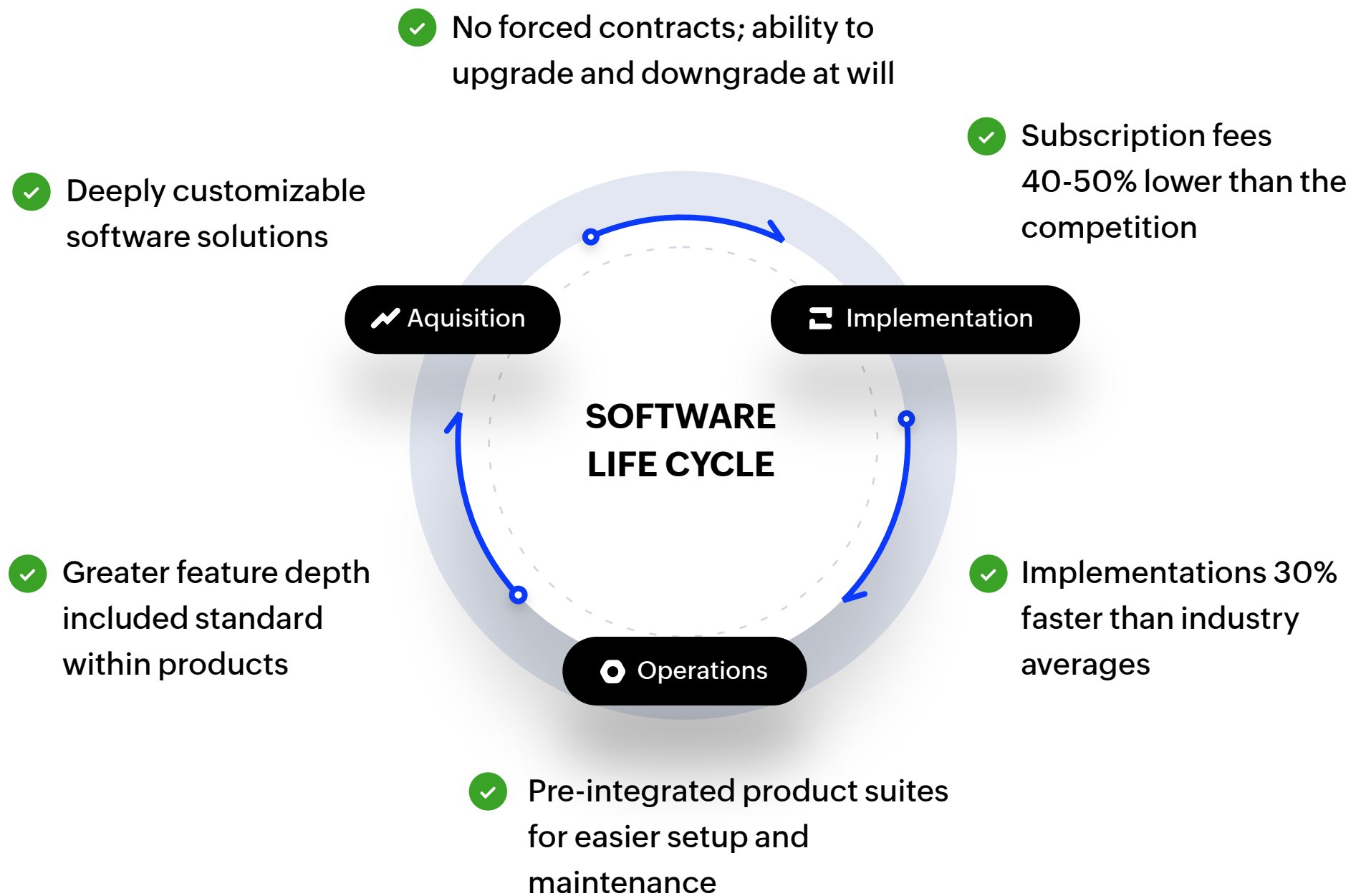
## Privacy as a principle

- GDPR-level protections are applied to every account, even those located outside of the EU.
- You own your service data 100%. Zoho processes it only according to your instructions.
- We have believed in the value of privacy since before it became legally required or morally fashionable.
- Zoho's Data Protection Officer and our dedicated privacy team report directly to the CEO.

## Secure at every layer

- ISO 27001, ISO 27017, and ISO 27018 certified
- SOC 2 Type II compliant in Security, Confidentiality, Processing Integrity, Availability, and Privacy
- All connections to Zoho servers must use Transport Layer Security (TLS 1.2/1.3) with strong ciphers
- Data encryption in-transit (TLS with Perfect Forward Secrecy) and at-rest (AES-256)

# Your best option across the solution life cycle



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



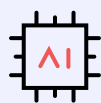
## Scalability & reliability

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



## Customization & 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.



## Generative AI & machine learning

Zoho's cross-app, ChatGPT-integrated AI assistant empowers employees at every level of your organization to automatically generate business-ready communication, streamline routine tasks, and unearth powerful, data-backed insights.



## 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](https://zoho.com/enterprise)

