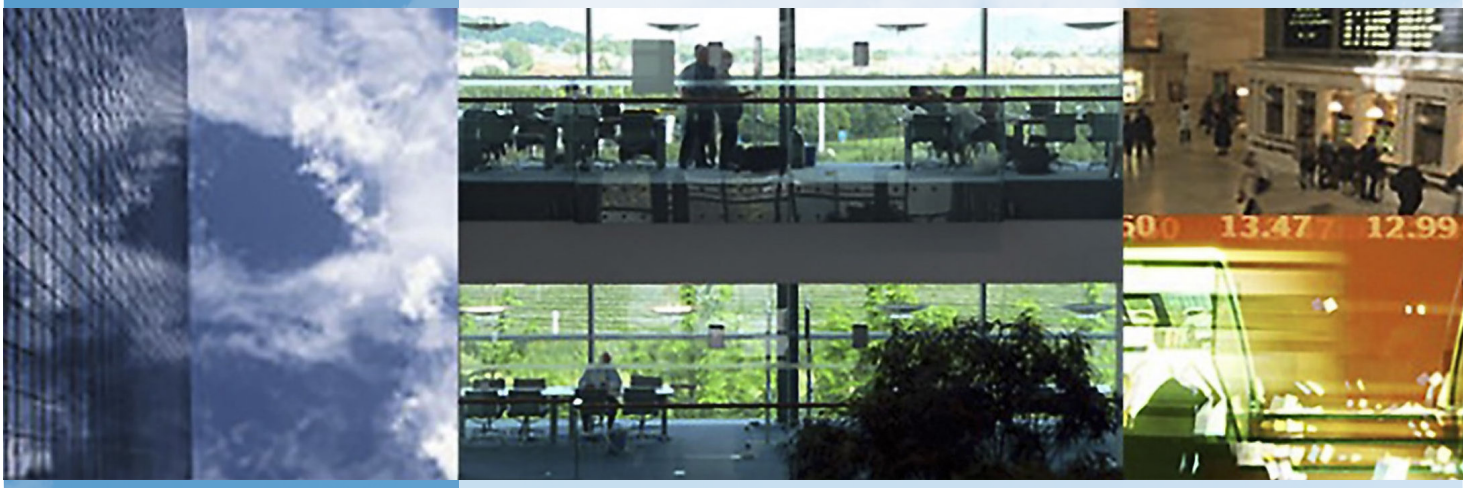

Zoho CRM in the Enterprise: Driving Value and Growth in a Diversified, Global Company

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Introduction: Bridging the Standardization/Competitive Advantage Gap

In an ideal world, technology exists to enable business success, and the more closely technology can be tuned to customers' specific business requirements the better. The advent of software-as-a-service (SaaS) has complicated that imperative, however. SaaS works best for vendor and customer when it serves two important goals: the first is to provide well-established standard processes that customers use to set up best-in-class business functionality; and the second is to support process standardization while still allowing customers to develop innovative business processes and user experiences that meet their specific goals and drive competitive advantage. Doing both well, however, while still supporting innovation and competitive advantage, hasn't always worked as well as vendors and their customers would like.

Successfully balancing these two sometimes opposing needs has been an important component in the success of Zoho Corporation and its flagship Zoho CRM products across a wide range of industries and geographical markets. Zoho CRM's combination of comprehensive, built-in functionality, and the flexibility of Zoho's integrated suite of applications and tools, has allowed customers to use Zoho CRM as a platform that can optimize their use of technology in the service of business success. This optimization, in turn, allows them to bridge the gap between the often-competing need for standardization and competitive advantage. This flexibility extends to the contractual and deployment side of the equation as well. Zoho's unique licensing terms and conditions allow customers to mix and match the components of CRM and the rest of the extensive Zoho suite in ways that support customers' requirements, not the vendor's business goals.

This combination of standard best practices and flexible competitive customization, when done well, allows a company to continuously deploy core CRM capabilities across two important axes. The first axis is defined by the ability to provide a closer process and functional fit, particularly as a company grows and its business opportunities and challenges evolve. The Zoho CRM platform's user experience – both within individual apps like CRM or Analytics, as well as within the development tools provided by Zoho – makes it easy for customers to adapt their Zoho environment to their specific needs while maintaining the standard best practices that represent the most effective way to manage everyday CRM processes.

The second axis can be seen in the increased number of users whose key business processes – standards-based and customized – are supported by Zoho. This increased

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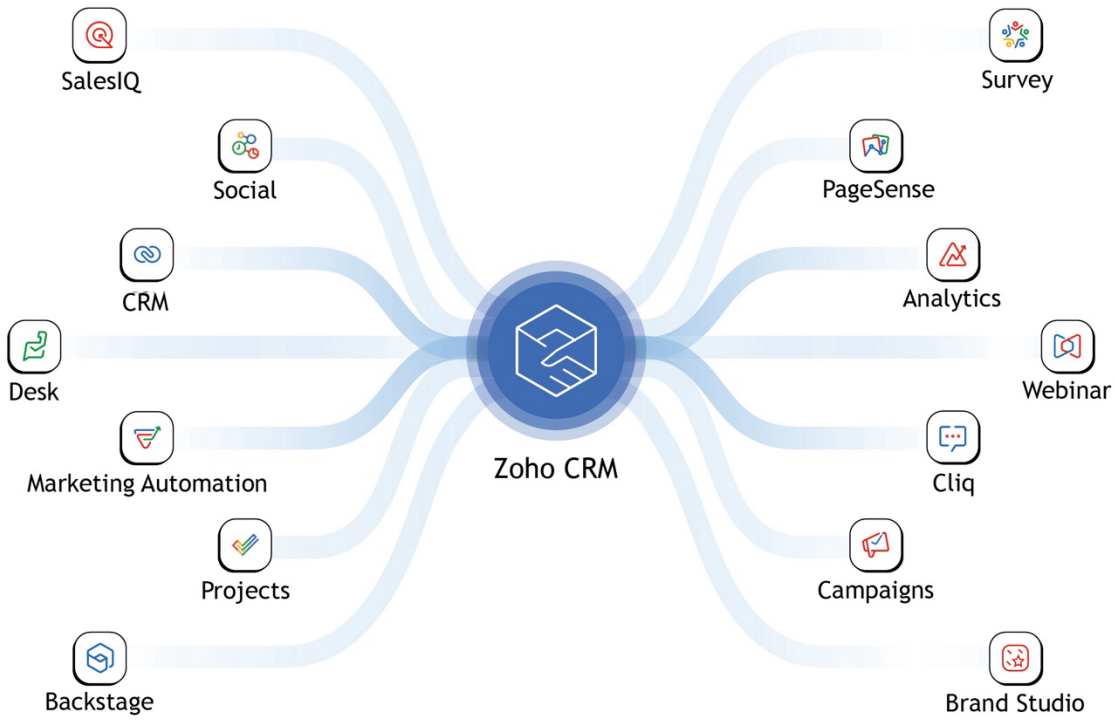
user base is part of the inherent virality of Zoho's applications, and is facilitated by Zoho's relatively low cost and simple contractual terms and conditions. This advantage is not to be discounted: The low cost of adding new users and new functionality and the ease with which this can be done both technically and operationally make it very easy for Zoho CRM customers to expand their internal user base with a high degree of confidence in the expansion's return on investment.

This report is the second in a series by Enterprise Applications Consulting (EAC) on how Zoho customers are able to leverage the company's applications and platform to meet their specific business opportunities and challenges. The customer experience described in this report will look specifically at Zoho CRM as both a highly functional CRM application in its own right, as well as the keystone application in an integrated platform that can be extended to meet the particular business requirements of its customers.

Figure 1: Zoho CRM Apps



Source: Zoho

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Measuring the Success of Zoho CRM at ABL Group

ABL Group, headquartered in London, is a global consulting firm that specializes in maritime, renewables, and oil and gas industries. The company, which reported revenues of $310 million in 2024, has approximately 1,800 employees in over 40 countries. ABL Group's combination of multiple lines of business, an extensive geographical footprint, an active acquisition strategy, and, as we shall see, some unique requirements for its customer-facing processes, provides a good example of how an otherwise daunting set of business requirements can be met by Zoho CRM and the rest of the Zoho platform.

The Key Parameters for Understanding the Value of Enterprise Software

There are four questions to consider when seeking to understand the value of a software offering that combines applications and a platform such as Zoho CRM. The answers to these questions in turn define the parameters by which one can measure the value of any enterprise software, in particular Zoho CRM:

- Does the software support the larger business goals of the company at present and in the foreseeable future?
- Does the software support the development of functional business processes that can be deployed to execute on those business goals?
- Does the software provide the technological underpinnings needed to support these business processes?
- Does the software provide a good cultural fit for both the general requirements of change management as well as the specific requirements of the acquiring company?

With these four questions as our guides, analyzing how well Zoho CRM has met the needs of ABL Group becomes a matter of first understanding the underlying requirements behind each question, and then understanding how Zoho CRM has helped ABL Group meet these goals.

The Business Case for Zoho at ABL Group: Meeting Changing Requirements

The business case for Zoho at ABL Group started in 2020 with the merger of two independent companies: AqualisBraemar ASA and LOC Group. Mergers and acquisitions

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are often the starting point for reimagining technology and its uses, particularly as there is often an acute need to rationalize disparate business processes and reconcile data models in order to optimize the value of the new entity. The merger that resulted in the formation of ABL Group was no exception. The two entities' CRM processes, which had been based on a mix of legacy CRM software and spreadsheets, were in need of an overhaul. Graham Dallas, now the Group Business Development Director at ABL, was tapped at the time to help select a new CRM system that could meet the immediate and future needs of the new company.

As is typical in mergers such as this one, at the core of the initial business case for Zoho was the need to have a standardized set of CRM processes, based on a unified data model, that could provide the foundation for the company's core business processes and lines of business. As is the case in many companies, however, those two requirements were basic "table stakes" compared to the larger business case for a new CRM system: Meeting ABL's unique requirements, based on its lines of business and plans for growth, required a lot more than just a unified set of standard CRM processes and a single underlying data set.

One of the fundamental business requirements for the new CRM system was the ability to support a highly dynamic business model that includes an active acquisition strategy. The new company, christened ABL Group, was in part formed to become the foundation for such an active acquisition strategy. In any company with this kind of grow-by-acquisition strategy, the ability to rapidly transform a newly acquired entity's business processes, and its underlying data, to match those of the acquiring company is a key best practice. In this way the acquiring company is able to obtain the greatest accretive value for the acquisition in the shortest amount of time.

This meant that ABL Group needed a CRM system that could be used to quickly establish standardized processes and data, and then, once established, serve as a platform for the rapid on-boarding of the new entities that the company expected to acquire. Zoho turned out to be a perfect match in this regard, Graham Dallas told EAC. ABL Group was able to use Zoho CRM as the platform for a "proper sales management and customer management process" that the company could roll out in support of this acquisition strategy, Dallas explained. "We're buying two to three companies a year, and this allows us to integrate them into the company."

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ABL Group's acquisition plans also meant that it needed a CRM platform that could support the company's expansion into new geographies as well. To this end, ABL Group was able to deploy a templated version of Zoho in its new offices in a way that "follows our model," Dallas added, while allowing the company to quickly add local requirements as well. The result is that ABL Group can get its new employees up and running on the company's standard and customized processes extremely quickly, an important requirement for a company that uses employee utilization rates as a key performance indicator. "We're a people business, and there's always this pressure with utilization rates," Dallas explained. "Our people can't spend too much time playing around with their CRM system."

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To further facilitate this effort, Dallas' team has developed standardized training as part of its on-boarding process. The ease-of-use of the Zoho CRM user interface, however, means that some of the new users can skip some or all of the training. "If they have CRM experience, they pick it up in minutes," Dallas added.

Another key requirement for its new CRM system was the ability to support a consultative sales process that is based more on building new business opportunities within a known customer base than prospecting for new leads. This requirement places a strong emphasis on contact and project management as opposed to a focus on lead generation that might be found at other professional services companies.

This is particularly true for ABL Group's marine casualty line of business, which works with maritime operators and their insurers in order to assess and manage the losses related to maritime incidents around the globe. This line of business draws its project work from maritime incidents that are by their nature unpredictable and therefore impossible to fit into a standard lead-generation process. Indeed, the prospective customers in marine casualty are already well known to ABL Group, Dallas explained, which means the sales process centers largely on staying in contact with existing customers. "We need to be in touch regularly and make sure that the insurance companies call us [and not a competitor] when there is a claim," Dallas said.

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How Zoho Helps Define and Build New Business Processes at ABL Group

The ability of Zoho CRM to meet ABL Group's overall business goals has in turn allowed the company to use Zoho to roll out net new business processes that support new business opportunities. An example of this can be seen in how Zoho CRM is used to help track customers across its growing global business footprint and identify upsell opportunities as new lines of business become available as part of a new acquisition. This, of course, is a direct outgrowth of the integrated data and process model built into Zoho CRM. "We try to identify synergies when we're talking to a client to see if there's an introduction we can make to another part of the business," said Dallas.

The ability to customize Zoho CRM has also helped ABL Group develop an exceptionally rapid response process for its marine casualty business that allows a new project, complete with job number, to be set up in a matter of seconds. The project is deployed via a customized CRM user experience that streamlines the process of finding the client in the global client database and getting a job number allocated.

Another good example of the use of Zoho Analytics can be seen in ABL's compliance reporting. Regulatory compliance standards can be mapped directly onto Zoho CRM, and Analytics can then be used to report on compliance success. This in turn allows compliance reports to be automatically generated or built on an as-needed basis. These reports are widely used across the company, both by individual quality assurance managers as well as at the executive level, Dallas noted.

> *"I was at a workshop recently and people were asking: 'Can Zoho do this and this and this?'*
>
> *Nine out of ten times the answer was yes."*

Importantly, Zoho CRM also functions as an ideal platform for enabling net new business process development, according to Dallas. The fact that the development environments that come with the Zoho applications family are specifically targeted at non-professional user/developers fits well into the ABL Group's business culture: The usability of Zoho CRM and related tools is well known to the company's user community, which helps drive a high degree of user acceptance. As Dallas and others at the company have become adept at

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developing in Zoho, new business processes can be developed quickly and aligned closely with the needs of specific business users.

The result is that Zoho has become a key go-to technology for new process development at ABL Group. “I was at a workshop recently and people were asking ‘Can Zoho do this and this and this?’” Dallas recounted. “Nine out of ten times the answer was yes,” said Dallas.

How Zoho Technology Makes This Possible

While the ease of development and customization, as well as the overall user experience, are essential reasons why Zoho has been such a good fit for ABL, some of the important technological underpinnings of Zoho’s success are generally hidden from view. Zoho’s high degree of support for robust cybersecurity is essential for companies like ABL Group, which counts many defense contractors among its customers, and therefore must adhere to exacting government security standards. Zoho’s adherence to privacy standards such as Europe’s General Data Protection Regulation (GDPR) is also essential for ABL, which has offices across Europe and in other locales that also adhere to GDPR or similar privacy standards.

Another important technological underpinning can be found in Zoho Flow. Zoho’s ability to integrate with other applications has provided an important technological benefit for ABL, particularly in support of its acquisition strategy. One of the key strategies for onboarding new companies is to start off by using Flow to quickly integrate the new entity’s existing CRM software to ABL Group’s Zoho CRM system. This integration allows the new entity to maintain its sales and customer support during the acquisition process, thus minimizing disruption, lowering the change management burden, and easing the way towards the eventual adoption of the Zoho CRM platform.

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ABL's Zoho Footprint

Zoho CRM isn't the only Zoho application in use at ABL. Some of the other applications include:

Zoho Analytics: Zoho Analytics is used extensively across ABL Group to create reports and dashboards that help drive decision-making at all levels of the company.

Zoho Flow: The support for integration in Flow plays an important role in rapidly integrating newly acquired companies' CRM systems into ABL Group's Zoho CRM system. Flow-based integration is usually a first step in getting business integration started before eventually deploying Zoho CRM at the new company.

Zoho Campaigns: Campaigns is used by ABL Group's marketing department and in regional offices to help manage and support a wide range of local and regional events.

Zoho Survey: ABL Group uses Survey to collect information from customers on maintenance and other issues that impact customer satisfaction.

Zoho Projects: Projects is used to manage internal project work. (ABL Group uses a different project management tool for its customer-facing projects.)

Cultural Fit and Future Growth at ABL

Zoho CRM's combined usability and functionality play a significant role in supporting cultural fit at companies like ABL, Dallas explained. The company's newer lines of business, such as renewables, attract a younger workforce. Those users easily adapt to Zoho, and especially appreciate Zoho's ability to run on a smart phone, Dallas added. Younger workers are also very interested in the customization capabilities of Zoho, according to Dallas, and often suggest new ways to automate older processes once they understand how easily it can be done using Zoho.

The usability of Zoho CRM can appeal to other constituencies as well. For example, the company's marine casualty business includes a lot of senior workers with deep domain experience whose expertise is essential in assessing the scope of an incident and in acting as expert witnesses in court proceedings. Zoho is able provide these employees with a user experience that is both user-friendly and functional without providing an overly complex or "leading-edge" user experience that can be off-putting to these workers, Dallas explained.

Zoho is also able to make itself relevant to the company's senior leadership, even if they aren't day-to-day users. ABL Group's leaders understand the role and value of the unified data model underpinning their CRM processes, and this recognition has made Zoho Analytics' reports and dashboards a valuable means for senior managers to stay on top of the business, according to Dallas. "Zoho became a single source of truth," Dallas

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told EAC, adding that this singular focus on unified data has become an essential part of how the company views Zoho.

This ability to meet the needs of a broad range of users, combined with the ease with which Zoho allows the company to develop and implement a new process, are important reasons behind the growing use of Zoho at ABL Group, according to Dallas. "We've doubled the number of Zoho users since we started," Dallas reported. And with the company's acquisition strategy firmly established, this growth in the number of users is slated to continue.

"We've doubled the number of Zoho users since we started."

Conclusion: ROI Isn't Just a Number

The experience of ABL Group showcases a wide range of ways in which Zoho CRM delivers demonstrable value to the company; it is the sum total of these different impacts that tells the true story of Zoho CRM's ROI. The value of onboarding a new business entity and being able to rapidly integrate its finances, people, and business opportunities is almost immeasurably large to a company like ABL Group. With a business model that is focused on optimizing the productivity of its people and its ongoing relationships with existing customers, the company cannot afford to have new employees disconnected from their new employer. Nor can it afford to miss an opportunity to extend valuable new services to an existing customer, particularly one that is already favorably inclined to work with ABL Group. Zoho CRM's ability to be customized to meet these requirements and rapidly deploy new users and new ABL-specific business processes with every acquisition makes it especially valuable for the company's acquisition-focused business strategy.

Zoho's ability to closely link functionality to a business model and then allow for that linkage to be delivered rapidly as part of a repeatable, templated model is not unique to ABL Group. Indeed, this capability, alone with Zoho CRM's ability to function as a platform that can leverage the extended family of over 40 Zoho applications, has helped deliver similar results to a wide range of companies across the global economy. To be able to do so while enabling a high degree of SaaS-based process standardization and a high degree of business-specific custom functionality makes Zoho CRM unique in a SaaS CRM market that otherwise struggles to support these complex and utterly essential goals.

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