CRM THAT HELPS YOU SELL SMARTER, BETTER, FASTER.

Reach out to your prospects at the right moment, engage with them across every channel, and close more deals the smarter way.

ZOHO CRM

130 million
emails sent

2.1 million
deals closed

35 million
hours spent
on sales calls

Trusted by over
150,000
BUSINESSES
WORLDWIDE

Quipper

CASTLE WATER

bookinglive

IIFL

MARCOA
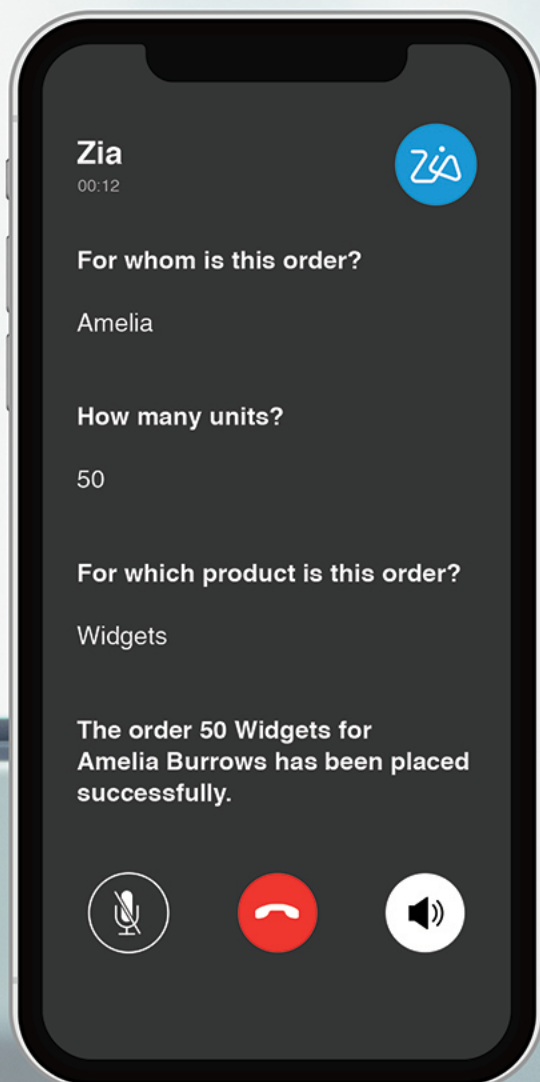
Selectra

Bright Owl

ROCHÉ

amazon.in

mogl

Zia Voice
The first conversational AI for CRM

With the ability to locate any information from your CRM, Zia Voice allows sales teams to spend less time searching for data and more time selling. Tap on the 'Ask Zia' button to chat with Zia, or call her from your mobile app for instant assistance. Zia's voice capability will tell you the number of new leads created this month, provide advanced revenue forecasts, and even give you traffic updates in your city. In addition to what she shows you about your CRM, Zia also completes tasks for you, like creating instant charts or adding notes to a contact.

Zia
00:12

For whom is this order?

Amelia

How many units?

50

For which product is this order?

Widgets

The order 50 Widgets for Amelia Burrows has been placed successfully.

Today

Sales Prediction

By this time you should have achieved $10,000 of revenue in order to meet your sales Target this month.

Tip : Increase your frequency of follow ups.

Focus on these "likely to win" deals.

Wednesday, Mar 28

Alert

Leads via SMB Sign up form is 10% lower than last week.

Today

Suggestion

3 of your users are spending 30% of their time performing repetitive tasks. You can improve their productivity by automating these tasks.

Show Workflow Rules

Attention

As per your workflow set up, it is most likely that the same customer would receive the below 2 templates on the same day.

Welcome Email | Trial feedback survey

Intelligent CRM with an AI-powered sales assistant

Zia is an AI-powered sales assistant for Zoho CRM. She helps individual reps and sales teams detect anomalies in the sales process before they occur, suggests the best time to contact a prospect, and even studies your sales patterns. A powerful CRM with some intelligence is what most companies want.

Scalable CRM with advanced customization

When it comes to a CRM solution, one size doesn't fit all businesses. That's why Zoho CRM lets you easily customize the interface to meet the particular requirements of your organization.

"

I like the ability to customize the various fields. The 6 other CRMs I tried were a lot less intuitive to move or change.

Carmel Royston,
Business Developer, Core-Digital Everything.

Extra fields for extra info

Zoho CRM comes with a set of pre-defined fields that cater to most of your business needs. If you need more, you can create new fields and record additional details like your customer's birthday or anniversary, in addition to company information.

Create new layouts and modules

Design new layouts and modules for custom sales processes. With fields, links, and buttons, you get everything you need to design your own layouts for each new process.
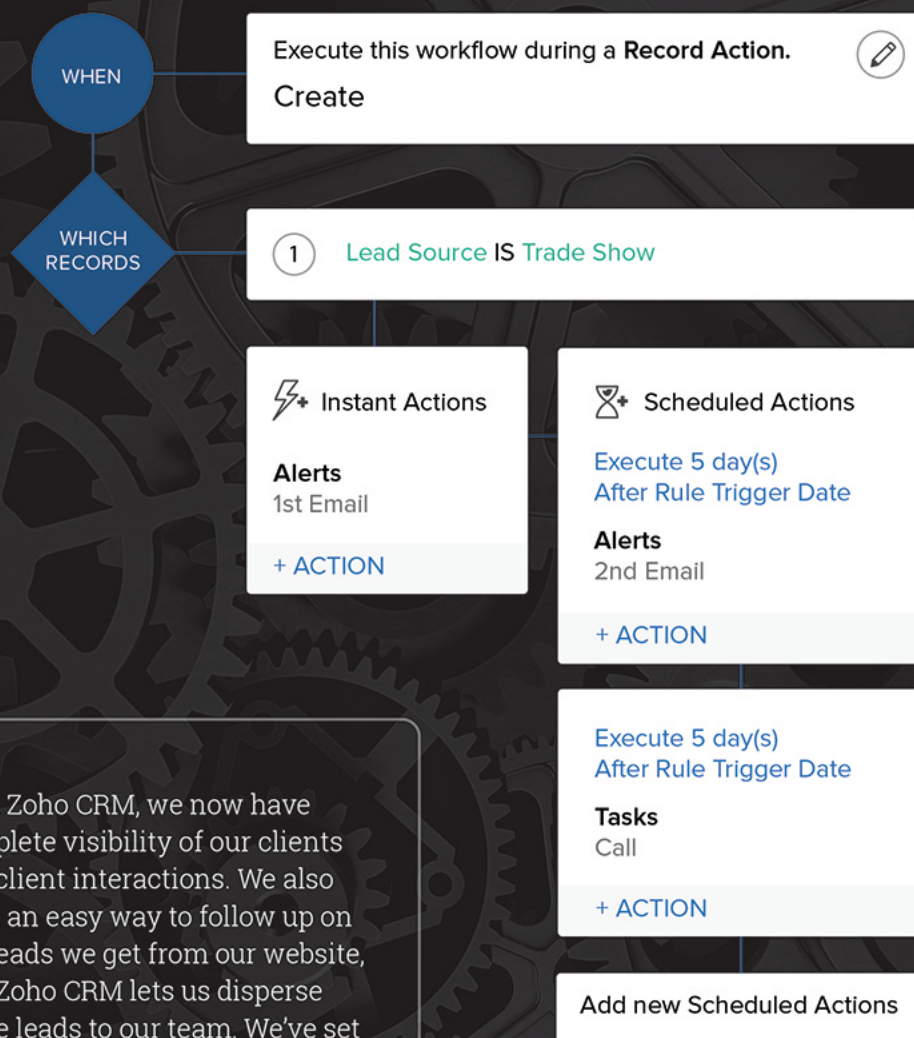
Don't just send emails, personalize them

Design a template to match your brand, or choose from our gallery of handpicked templates and customize them. Use the template editor to drag and drop elements, such as text, images, tables, and columns.

Increase productivity with workflows

From sending follow-up emails to maintaining customer records, there's lot of work to do every time your sales team interacts with a prospect. Use workflows to save time and make your employees' lives easier.

Nurturing rule for trade show leads @ Leads

WHEN

Execute this workflow during a **Record Action.**
Create

WHICH RECORDS

1   Lead Source **IS** Trade Show

⚡ **Instant Actions**

Alerts
1st Email

+ ACTION

⧖ **Scheduled Actions**

Execute 5 day(s)
After Rule Trigger Date

Alerts
2nd Email

+ ACTION

Execute 5 day(s)
After Rule Trigger Date

Tasks
Call

+ ACTION

Add new Scheduled Actions

> "
> With Zoho CRM, we now have complete visibility of our clients and client interactions. We also have an easy way to follow up on the leads we get from our website, and Zoho CRM lets us disperse those leads to our team. We've set up some automated processes, alerts, and tasks to make sure that we give our customers the best possible service and support.
>
> **Kevin Lippert,** President, JetHub.
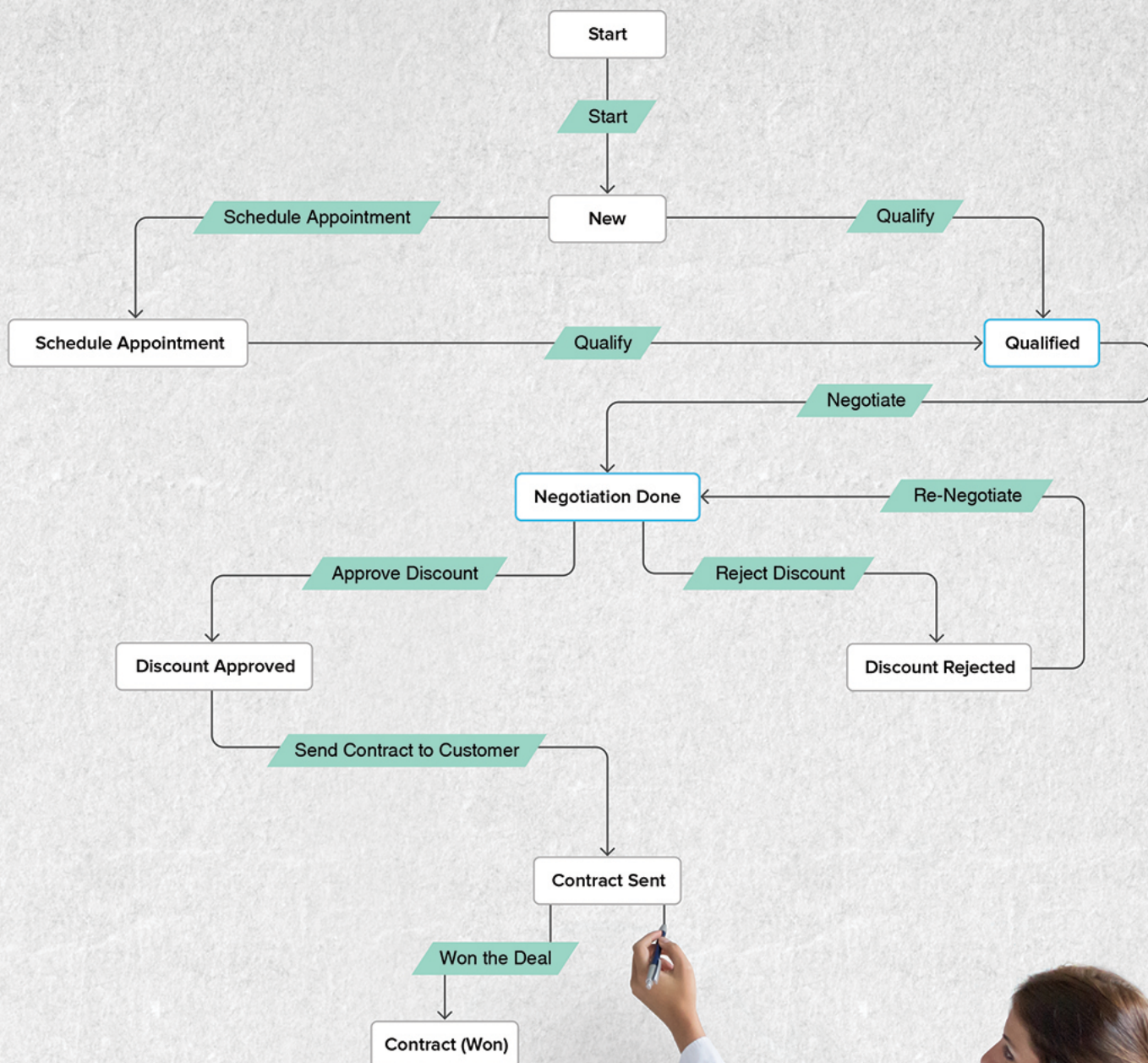
Build a scalable sales organization with Blueprint

As your sales team grows, you need to make sure the sales processes you've designed can scale and that the same level of attention is given to the right customers and leads. Zoho CRM's Blueprint ensures that everyone in your team follows the right process, even when you're not looking.

Sell in realtime

Learn how customers are interacting with your website, marketing emails and know what they're saying about your brand on social media. SalesSignals in Zoho CRM help you stay on top of your customers' activities, so you can learn more about them and have more engaging

Run intelligent searches with Advanced Filters to quickly find leads or deals that need your immediate attention. Or go one step further with Saved Filters. Create custom filters, save them, see a real-time total of how many leads you have in each filter, and decide what your next course of action should be.

The industry's first multichannel CRM

Meet your customers, no matter the medium. Multichannel support in Zoho CRM lets you reach people on the phone, via live chat, email, through social media, and even in person. Use visitor tracking and email analytics to know what your customers are seeing, and find opportunities for engagement. Communicate, connect, and close the deal with Zoho CRM.

TELEPHONY

Melinda Anderson
Calling...
ANSWER

Melinda Anderson
Ventura Capitalists

Open Deal

180 Widgets - $18,000.00

Deal Owner	Amella Burrows
Stage	Proposal/Quote
Probability (%)	75
Expected Revenue	$13,500.00
Closing Date	2016-07-29

EMAIL

Email Status

sent

in the last   2   days

and status is
- opened
- not opened
- bounced
- opened and not replied

LIVE CHAT

Chloe Reese   Chat
Apex Corp, $ 38,000.00
Pages Visited 5 Pages   10:23
now in Pricing page
Days Visited   Last Visited
4   Yesterday

Visitor 80578   Chat
United Kingdom
Pages Visited 2 Pages   10:14
now in Contact page
Days Visited   Last Visited
4   Today

Jack Brown   Chat
United States

SOCIAL MEDIA

Lini Evans
@Levans
San Francisco, CA

- Add as Lead ● Add as Contact

Layout	Standard
Account Name	Betacry Inc
First Name	Lini
Last Name	Evans
Email	lini.es@bet.com
Owner	Michelle Brown

> "
> I like the opportunity to book meetings and record phone conversations. This certainly gives me a very good picture of my prospects.
>
> Lawrence Perry, UK Director, Digiteum

Top-notch security

With its built-in security features, Zoho CRM helps you strike the balance between protecting customers and giving employees the freedom to get work done.

- Secure IP restriction
- Two-factor authentication
- Audit logs
- Set access permissions and more.

CRM that keeps your partners, customers, and vendors on the same page

Portals help you create a virtual space in your CRM for your partners, customers, and vendors to access all past purchases, cases, and invoices so that you can keep them actively involved in your sales process.

Catalyst - The hyper customization platform

Build custom applications on your CRM platform with a range of developer tools from Zoho CRM. Create and distribute apps tailored to different users or needs in your organization. Develop custom widgets that fetch data from external sources, while also tightly integrating with your Zoho CRM account. Build, test, and deploy apps right from your CRM account, and save the costs (and stress) of owning and managing a dedicated server.

Build
Mobile SDKs | Web SDKs | Widgets

Distribute
MDM

Scale
Serverless computing

~~Create~~
Paint your own view

As the industry's first-of-its-kind view, Canvas helps businesses create custom list views across modules. With an effortless drag-and-drop list builder, pick your fields, add custom buttons, include images for easy identification, and fully customize the list view to meet your business needs.

View : Car ▾

Vintage Cars
Ford Model-T classic vintage car
Year : **1921** | KMs Driven: **1,50,323** | Fuel : **Petrol** | Owner : **1**st

Zylker & Sons 📍 **Austin, Texas** 📞 **404-293-6404** ✉ **emily@zylker.com**

$32,000
Posted on: **25 Apr**

Associate Buyers
Interested Buyers: 4

Retro Cars
Fiat 500 Nuova
Year : **1959** | KMs Driven: **1,21,280** | Fuel : **Petrol** | Owner : **3**rd

Wheel Yakitri 📍 **Austin, Texas** 📞 **915-737-7785** ✉ **austin@wheelyakitri.com**

$21,000
Posted on: **29 Mar**

Associate Buyers
Interested Buyers: 12

Retro Cars
Chevrolet Impala
Year : **1958** | KMs Driven: **97,423** | Fuel : **Petrol** | Owner : **7**th

Bizzey & Sons 📍 **Austin, Texas** 📞 **404-293-6404** ✉ **reach@bizzey.com**

$12,500
Posted on: **12 Mar**

Associate Buyers
Interested Buyers: 42

Vintage Cars
Corvette convertible
Year : **1956** | KMs Driven: **1,34,237** | Fuel : **Petrol** | Owner : **4**th

Trudoo Cars 📍 **Silver Spring, Maryland** 📞 **386-518-9453** ✉ **contact@trudoocars.com**

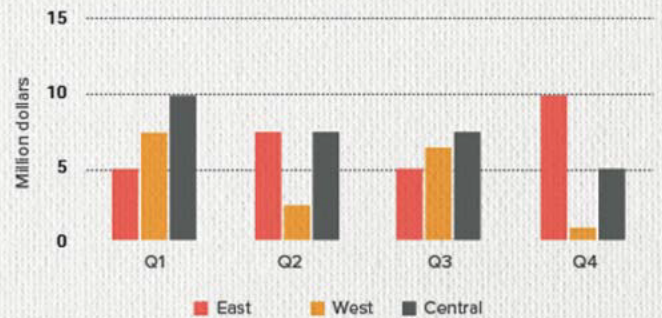**$24,600**
Posted on: **01 Feb**

Associate Buyers
Interested Buyers: 8

# Manage your key performance metrics like never before

Accelerate your sales and marketing efforts with a powerful analytics tool that paints a picture of both your current and future performance. With the drag-and-drop dashboard builder, measure and monitor your key performance indicators.

Create charts in one step, without having to go through the process of selecting a report. Set targets for your team, create instant comparisons across modules, carefully follow your sales pipeline, and make sure your business is headed in the right direction with Zia's trend analysis and anomaly detection.
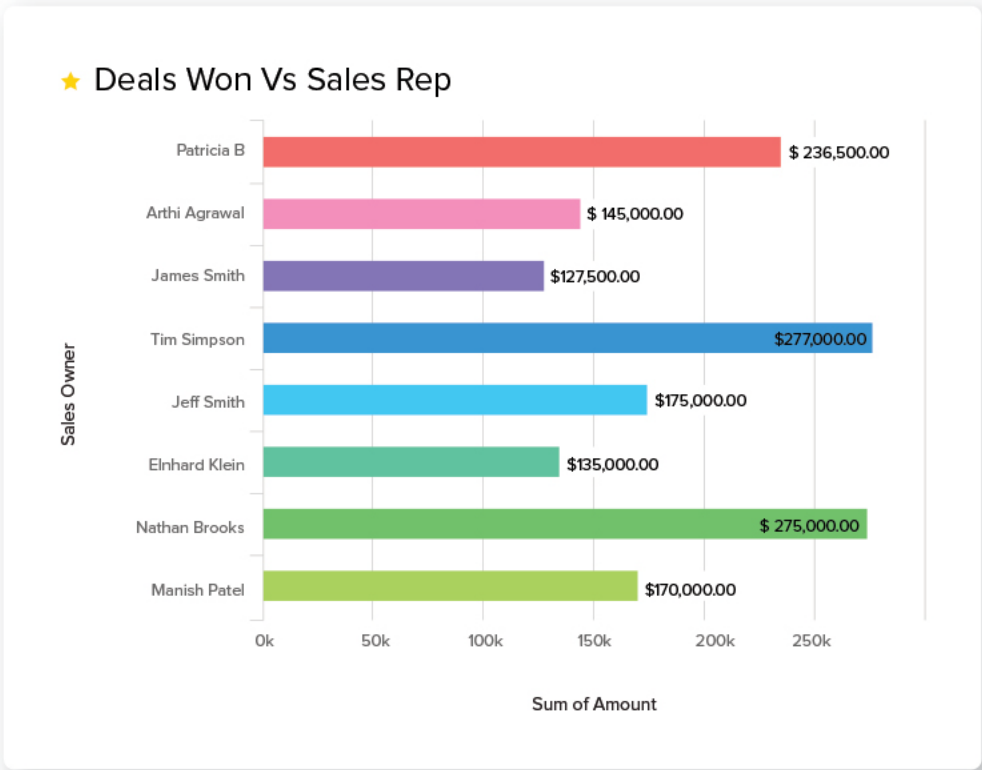
Revenue per quarter

Million dollars

East   West   Central

Leads generated

22,410

50,138

27,452

East   West   Central
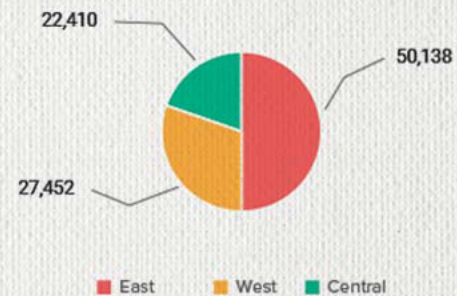
Recent lead generation - By source

	Mar 12	Mar 13	Mar 14	Mar 15	Mar 16	Mar 17	Mar 18	Mar 19	Mar 20
Trade Show	72	22	21	22	28	50	11	18	41
Partner	67	48	52	16	115	120	96	30	84
Online Store	24	117	64	19	117	6	98	32	64
Facebook	8	78	123	114	8	12	88	82	123
Referral	19	58	15	132	5	32	44	1	97
Advertisement	10	92	35	72	38	88	13	31	85

0
25
50
75
1/1

Powerful analytics that paint a picture

When you use different apps to store your data, it is vital that they can talk to one another. If they don't communicate, your data winds up in silos, and it is virtually impossible to get a complete view of your business. With Advanced CRM Analytics powered by Zoho Analytics, integrate your data and gain better insights.

⭐ **Deals Won Vs Sales Rep**

Sales Owner	Sum of Amount
Patricia B	$ 236,500.00
Arthi Agrawal	$ 145,000.00
James Smith	$127,500.00
Tim Simpson	$277,000.00
Jeff Smith	$175,000.00
Elnhard Klein	$135,000.00
Nathan Brooks	$ 275,000.00
Manish Patel	$170,000.00

Favorite Reports

Create Report   **Advanced CRM Analytics**
powered by Zoho Analytics

Reorder

REPORT NAME	DESCRIPTION	LAST RUN DATE
⭐ Salesperson's Performance Report	Potentials gained by salesperson	Now
⭐ Leads by Source	Leads from various sources	8 May
⭐ Today's Sales	Today's Sales	28 Apr
⭐ Revenue for the month	Revenue for the month based on your pipeline	16 Mar
⭐ Potentials by Type	Potentials by Type	5 Mar
⭐ Overall Sales Cycle Duration by Territory	Overall Sales Cycle Duration by Territory - summary	11 Feb
⭐ Pipeline by Probability	Potentials by Probability	3 Jan

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ZOHO CRM

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