



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for Zoho CRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

Contact us for the full, detailed 20-page CRM Software Review for Zoho CRM or any of 30 other major CRM applications.

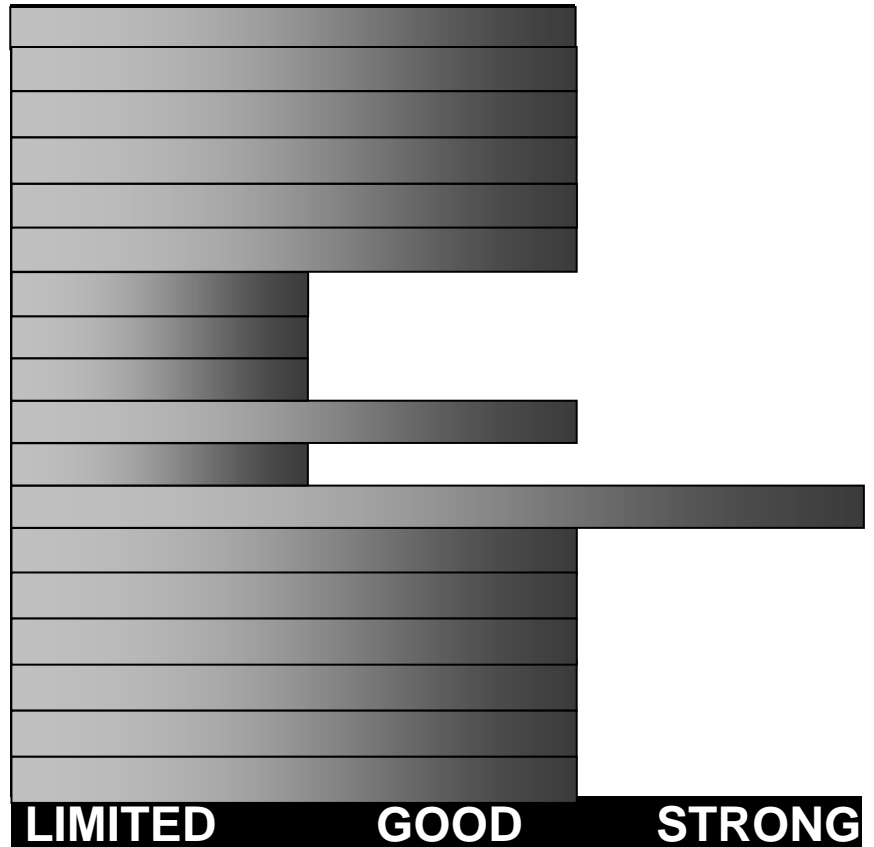
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Zoho CRM at a Glance:

Business Functions

Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
Business Analytics	✓
e-Business	✓
Project Management	✓
ERM	✓
Field Service	✓
Mobile CRM Functionality	✓
Social CRM Functionality	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions



Strengths:

- Project management
- Contact profiles
- Quote profiles
- Territory alignment
- Marketing campaign templates
- Apple Watch business apps
- Predefined reports
- Social Media dashboard

Weaknesses:

- Limited telemarketing/telesales
- Limited marketing
- Limited lead management
- Limited e-Business

Executive Summary

Zoho CRM is an on-demand CRM software designed to streamline a small to mid-sized organization's sales, marketing, customer support and inventory management in a single system. The Zoho CRM application has strong functionality in project management, and good functionality in contact, account, sales and time management. Additionally the Zoho CRM application has good functionality in customer contact center, customer service, business analytics, ERM, field service, mobile CRM and Social CRM.

Contact management, Account management, Sales management

Contact management includes the ability to access contact profiles with predefined fields for contact information. Account management provides the users with account profiles with predefined fields for account information and quote profiles. Sales management features give the user the ability to access a potential opportunity profile with predefined fields for opportunity information. The alignment of CRM records by geographical territory can be set via the Territory Management feature. Time management functionality is available via the integration of MS-Outlook.

Customer service, Campaign management

Customer contact center functionality is available via User ID and password access over the Internet. Customer service features include the ability to customize incident profiles and incident assignment via workflow configuration. The user can additionally view stock information for a specific product in fulfilling an order. Email and Social Media marketing campaign templates are available to be used for a marketing campaign. Campaign statistics can be accessed in a campaign report. Business apps for Zoho applications such as Zoho expense, Zoho accounting books, Zoho Website monitoring, Zoho reports creator, etc. are available for an Apple Watch device. Customer survey functionality is also available as the user can create multiple choice surveys with question logic.

Business analytics, Project management

Business analytics features provide for the ability to 100+ predefined report templates in the built-in reporting package. Project management is comprehensive with the ability to access project profiles with links to related activities and cases. Users can additionally set up contractor/subcontractor relationships, project resource allocation and expense reports for a project.

Employee relationship management, Field service, Social CRM features

Employee relationship management features include the ability to customize employee profiles, access the training/skills of all employees and set up the compensation of employees. Field service and mobile CRM functionality is available on an iPhone or Android device. Social CRM features enable users to access a Social Media dashboard with relevant Social Media statistics and Social Media posts from Facebook, Twitter, Google+ and LinkedIn profiles.

Limitations

Zoho CRM is limited in telemarketing, marketing, lead management and e-Business functionality.



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Contact

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Company Profile

YEARS IN BUSINESS	19	PRICE – MULTI-USER	Vendor Disclosed
NUMBER OF EMPLOYEES	2,700	SERVER	N/A
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	Vendor Disclosed		
TOTAL NUMBER OF CUSTOMERS	75,000+		
LANGUAGES AVAILABLE	List of languages supported is available on Zoho Website		
LIST OF RESELLERS	List of partners is available on Zoho Website		