



AI-driven Business Optimization with Zoho CRM

Powered by Zia, Zoho's AI assistant

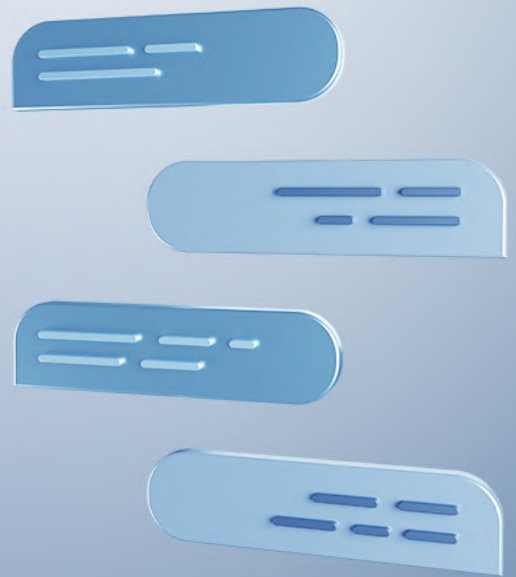


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AI in CRM

The volume of data in today's world has increased manifold, and as a result has turned sales into a much more complex process. Most of this data is unorganized—further adding to the complexity. It's not only exhausting for sales reps to manage the vast volumes of data captured in their CRMs manually—the return on investment doesn't justify the time and effort spent on this activity. This has a negative impact on sales reps' productivity on other critical sales tasks.

Artificial intelligence has therefore emerged as a welcome respite for sales reps. AI-powered CRM systems provide sales reps with an array of valuable analytics and insights, and even perform many predictive tasks for them based on an analysis of patterns and trends. This provides enough room for sales reps to focus on more important sales tasks that can boost their business yield. Zoho CRM also strives to provide admins, managers, and sales reps with the best data-handling capabilities through its AI assistant, Zia.

Zia for Zoho CRM

Zia is Zoho's AI assistant that optimizes your CRM data through data mining and machine learning to deliver key business information such as sales predictions, recommendations, alerts, data enrichment, voice of the customer insights from various channels, anomalies, forecasting, conversational AI, and more.

Zia saves you time by reducing the need for manual effort and mitigating the risk of unintended manual errors, and therefore improves your data-handling capabilities and helps you understand your customers' needs and behaviors so you can deliver personalized customer experiences. Let's now take a close look at Zia's various features and how they can help your business.

Data enrichment

Why care about data enrichment?

There might be times when you don't have sufficient data about a lead or a contact. Elementary details like name and email address might not be of much help. But your leads and contacts might have online profiles, such as social media accounts, company listings, or websites.

You might also receive emails from your leads or contacts with signatures in them. These signatures might contain some useful data such as job titles, designations, web addresses, contact numbers, social media handles, and so on. Having access to and capturing such details could equip you with valuable lead or customer information. This is data enrichment.

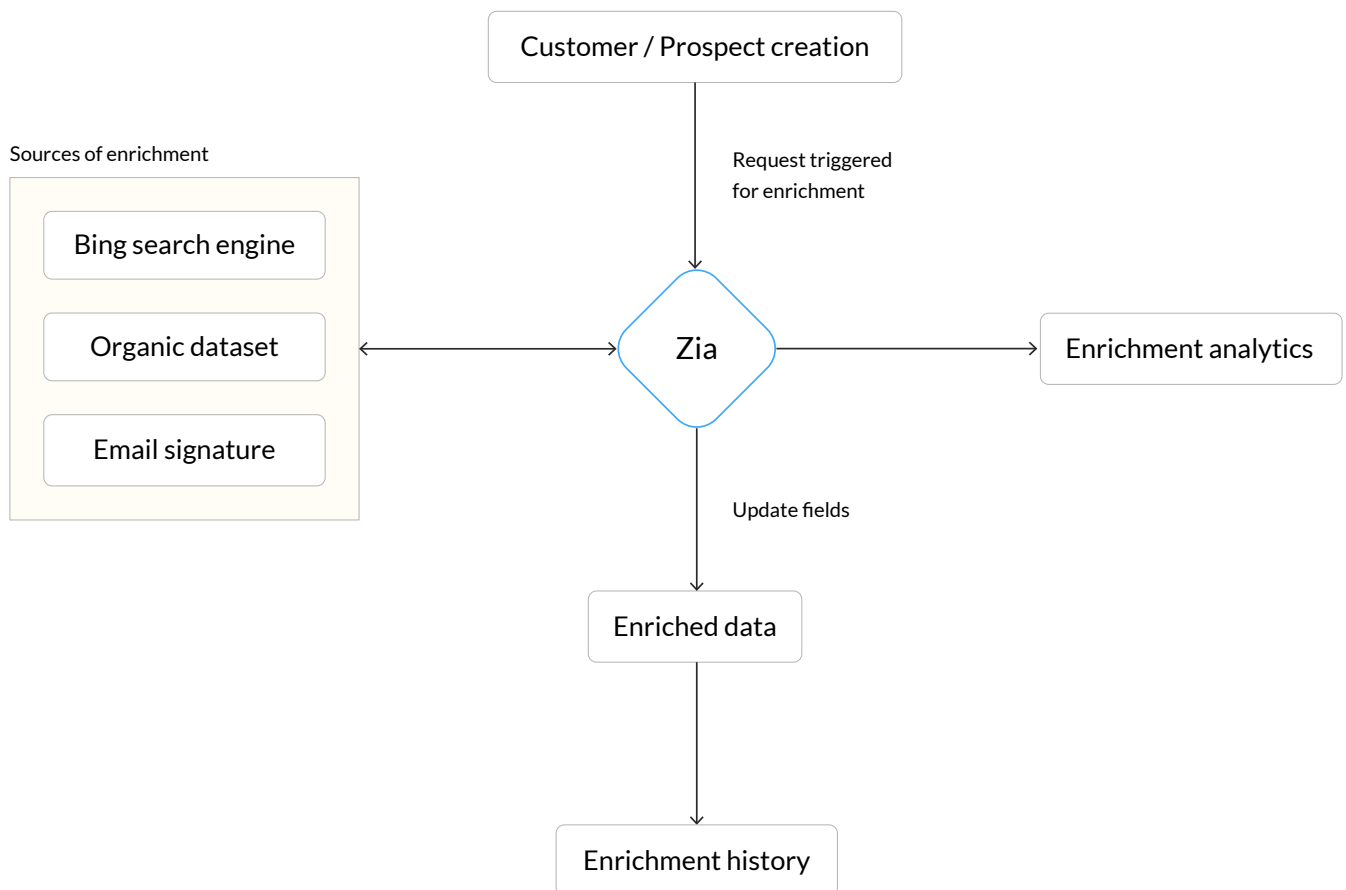
Data enrichment in Zoho CRM

In Zoho CRM, Zia seeks and retrieves additional information about your records from the internet based on primary information you've provided, which enhances your CRM data quality by minimizing the possibility of incorrect or incomplete CRM data, and thereby helps your sales reps understand and serve prospects' needs better.

It also derives useful data from email signatures and captures them in your CRM account for leads, contacts, and accounts. Some of the important details that Zia can capture include email address, website, contact number, company name, social handles, designation, company location, address, and so on.

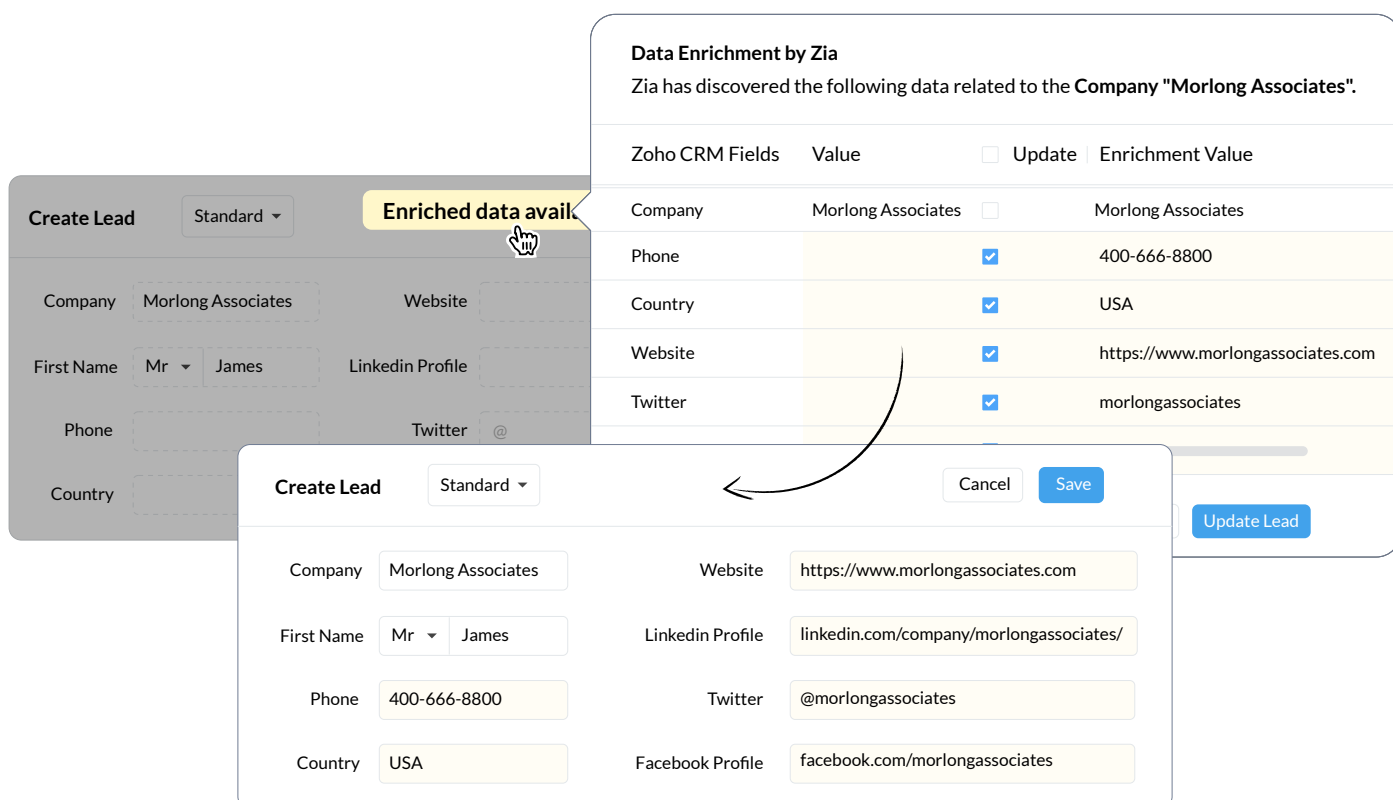
How it works

The flow diagram below depicts the working of data enrichment in Zoho CRM:



Example scenario 1

Imagine you have a lead for whom you only have basic details, like name and email address. Let's say Zia fetches you information such as the lead's location, phone number, and social profiles, as shown in the screenshots below. You can use these data to analyze various aspects that impact your business.



Data Enrichment by Zia
Zia has discovered the following data related to the Company "Morlong Associates".

Zoho CRM Fields	Value	<input type="checkbox"/> Update	Enrichment Value
Company	Morlong Associates	<input type="checkbox"/>	Morlong Associates
Phone		<input checked="" type="checkbox"/>	400-666-8800
Country		<input checked="" type="checkbox"/>	USA
Website		<input checked="" type="checkbox"/>	https://www.morlongassociates.com
Twitter		<input checked="" type="checkbox"/>	morlongassociates

Create Lead Standard ▾

Company: Morlong Associates Website:

First Name: Mr ▾ James LinkedIn Profile:

Phone: Twitter: @

Country:

Buttons: Cancel Save Update Lead

Create Lead Standard ▾

Company: Morlong Associates Website: https://www.morlongassociates.com

First Name: Mr ▾ James LinkedIn Profile: linkedin.com/company/morlongassociates/

Phone: 400-666-8800 Twitter: @morlongassociates

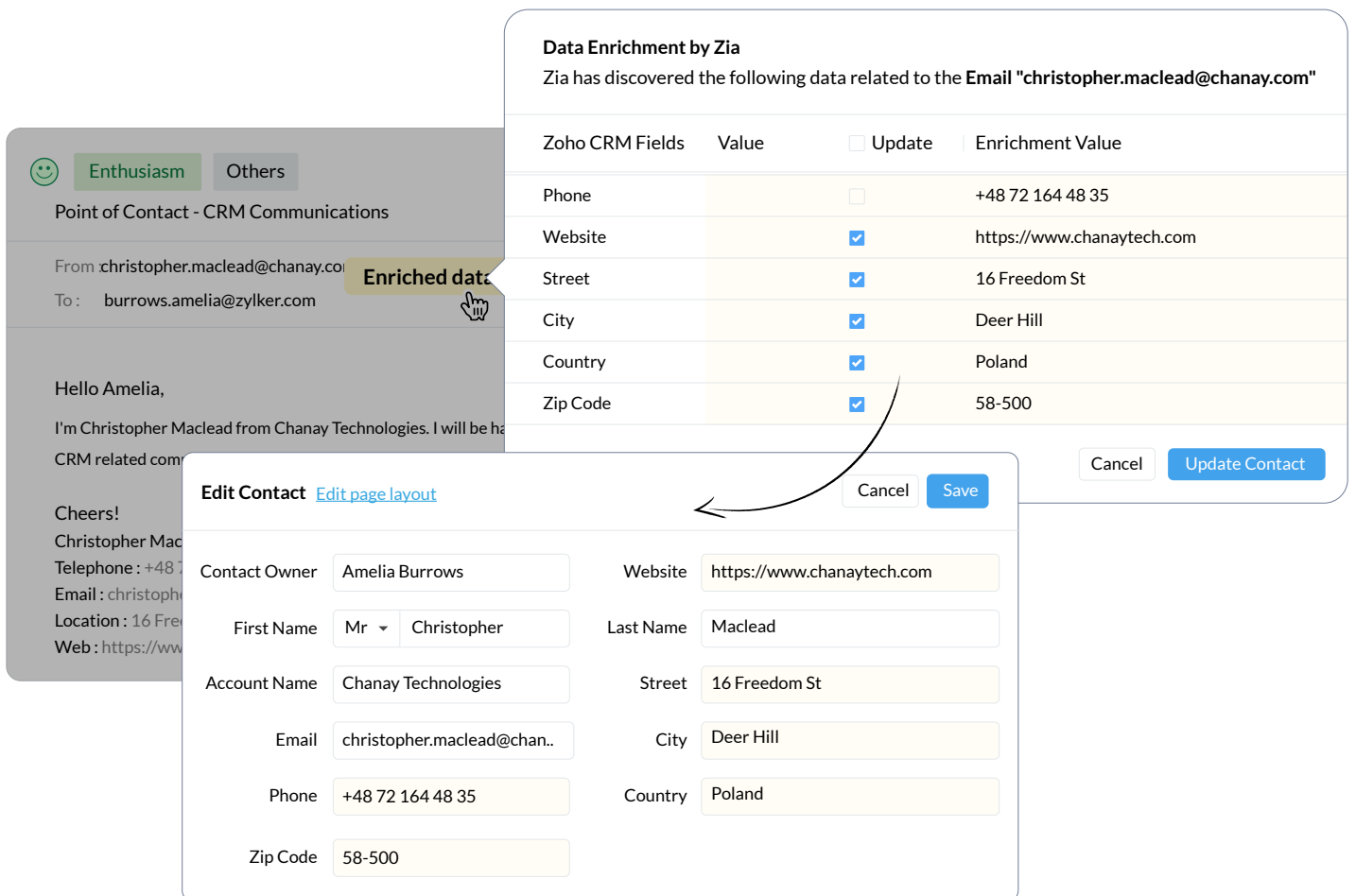
Country: USA Facebook Profile: facebook.com/morlongassociates

For example, using the location data, you can analyze factors such as your market presence in that region, your competitors there, your chances of beating out your competitors to capture the lead, and so on.

The fields for which Zia fetches information are called the enrichment fields—in this case, the lead's location, phone number, and social profiles. These fields provide you with a clearer picture of the various factors you might need to consider before you decide on necessary actions.

Example scenario 2

Let's say one of your customer companies has assigned a new point of contact for CRM-related communications. The new contact sends you an email informing you of this change. In the email, the new contact has also included his email signature.



The screenshot illustrates the process of updating contact information in Zoho CRM based on an email signature. An email from Christopher Maclead of Chanay Technologies is shown, with a 'Data Enrichment by Zia' popup displaying discovered information. An 'Edit Contact' modal is open, showing the updated contact details.

Data Enrichment by Zia
Zia has discovered the following data related to the Email "christopher.maclead@chanay.com"

Zoho CRM Fields	Value	<input type="checkbox"/> Update	Enrichment Value
Phone		<input type="checkbox"/>	+48 72 164 48 35
Website		<input checked="" type="checkbox"/>	https://www.chanaytech.com
Street		<input checked="" type="checkbox"/>	16 Freedom St
City		<input checked="" type="checkbox"/>	Deer Hill
Country		<input checked="" type="checkbox"/>	Poland
Zip Code		<input checked="" type="checkbox"/>	58-500

Edit Contact [Edit page layout](#)

Contact Owner: Amelia Burrows | Website: https://www.chanaytech.com

First Name: Mr Christopher | Last Name: Maclead

Account Name: Chanay Technologies | Street: 16 Freedom St

Email: christopher.maclead@chan.. | City: Deer Hill

Phone: +48 72 164 48 35 | Country: Poland

Zip Code: 58-500

Since this contact is new, you won't have his details in your CRM. You could manually collect and enter the details in your CRM, but since the contact has included his signature in the email, you can instead use Zia's email data enrichment feature to capture the contact details from his signature.

Bottom line

- ✓ Comprehensive and accurate data.
- ✓ Personalized customer journeys.
- ✓ Improved response time and quality.
- ✓ No redundant data.
- ✓ Valuable lead and customer data captured from email signatures.

Resources

To learn more about how to configure data enrichment in Zoho CRM, please review the documentation below:

- ✓ [Data enrichment - help documentation](#)
- ✓ [Data enrichment for emails - help documentation](#)

Prediction

Field prediction

Why make predictions?

In order to make certain business decisions, it's important to know how certain modules in your business are likely to perform. Though it's not possible to determine exactly how things will turn out, predicting the most probable outcome can still help you arrive at better decisions and pro-actively implement the appropriate measures.

To make predictions for your organization, you would normally need to run through countless CRM records and fields, gather relevant data points, analyze and identify patterns, and then arrive at predictions through inference. Manually doing this is a daunting task—and also highly susceptible to errors. This is where Zia's field prediction can help.

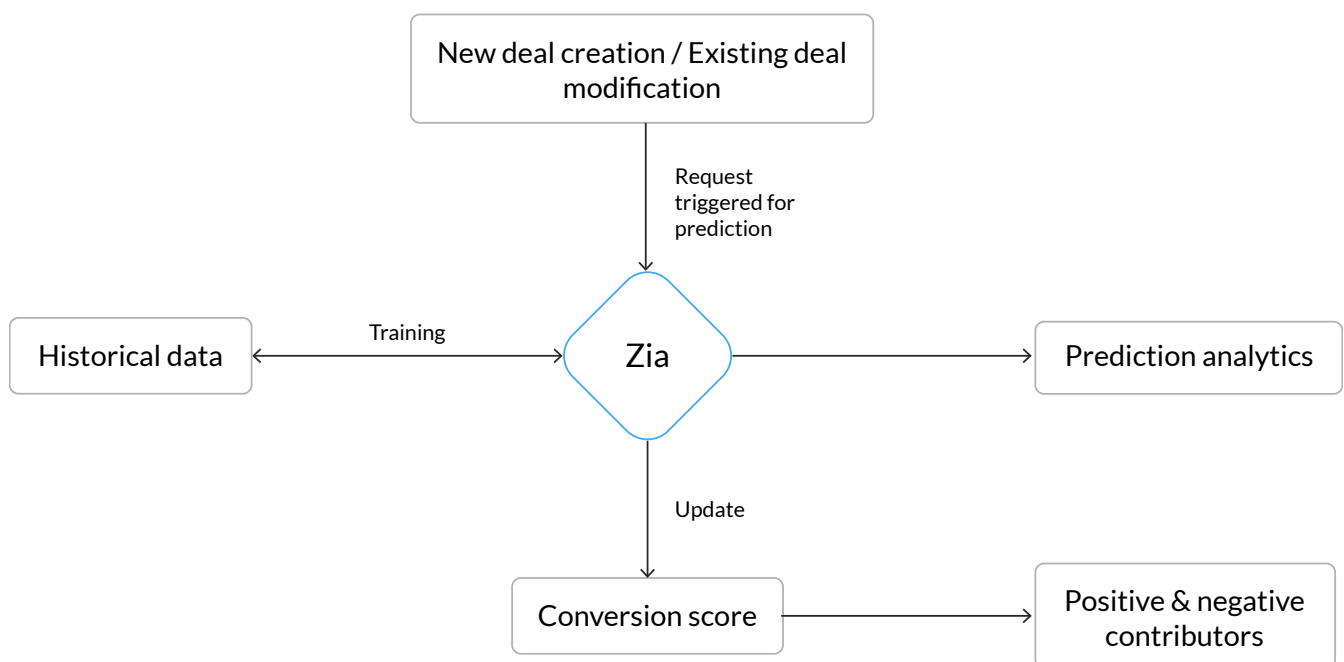
Field prediction in Zoho CRM

Zoho CRM's field prediction enables you to build custom predictions that align with your business requirements. This simple and intuitive builder can quickly predict values for various business metrics, such as the likelihood of winning or losing a deal, the expected revenue from it, the likelihood of a user buying a specific product as part of the deal, and more—based on a selected field.

Zia studies your data according to the conditions you specify and generates predictions. These predictions provide you with better insights to plan or modify existing sales and marketing strategies.

How it works

The flow diagram below depicts the working of field prediction in Zoho CRM:



Example scenario

Let's say you run an insurance company. You've recently introduced automotive insurance to your services and want to predict the likelihood of customers buying this new service. In the Deals module, you have a field named "Insurance type" and "Automotive insurance" as one of the options under it. You can generate a prediction for this field so you can determine how your automotive insurance service would perform overall and the appropriate business strategies to achieve it.

Prediction Analytics

Create New Prediction

Prediction Name: Automotive Insurance Prediction

Select Module: Deals

What do you want to predict?: Insurance Type

Within Insurance Type which option(s) you want Zia to predict?: Automotive Select Values

Negative values: Term Health Accident Cover

Which records should Zia use for learning?


1 Deal Stage is Closed Won Closed Lost

Prediction


Insurance Type

Automotive Score 80

Insurance Type prediction

 **Positively contributing field**

- Car IDV
- Tenure
- Third-party coverage

 **Negatively contributing field**

- Claim status
- Age of vehicle

Bottom line

- ✓ Customized predictions.
- ✓ Insights on potential strategies.
- ✓ Build predictions for any standard or custom module.

Resources

To learn more about how to configure field prediction in Zoho CRM, please review the documentation below:

- ✓ [Field prediction - help documentation](#)

Churn prediction

Why measure customer churn?

Customer churn can have a significant negative impact on your business. Rather than analyzing what went wrong after a customer has churned, the better option is to prevent it by proactively identifying customers who might churn. Zia's churn prediction helps you accomplish this.

Zia can come up with real-time predictions on the churn probability of any given customer and help you proactively spot those who are likely to churn. This enables you to identify any shortcomings and redress the customer's grievances.

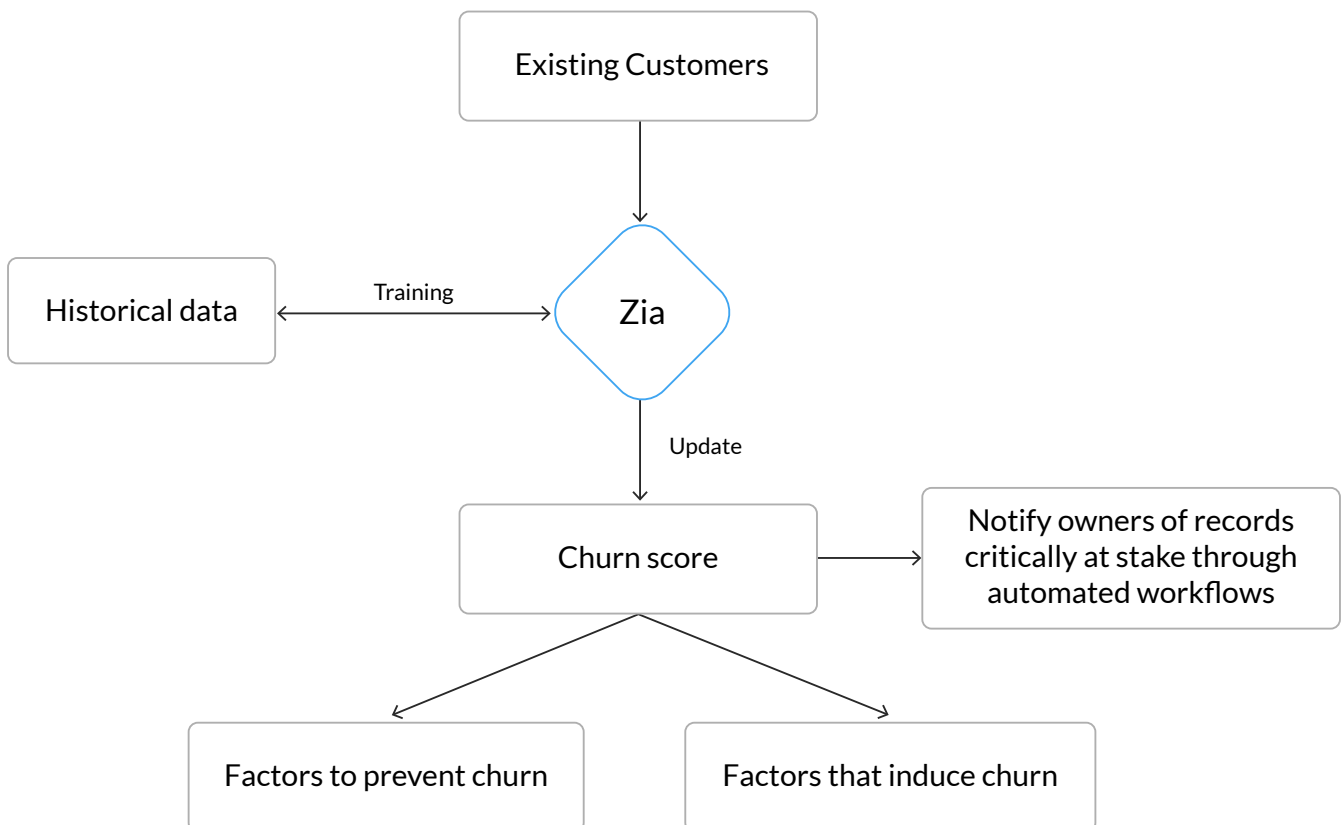
Churn prediction in Zoho CRM

Zia predicts whether a customer will churn out of your business or not and displays a churn probability score for each customer record. The higher this score is, the higher the probability of that customer churning.

Zia also indicates the product or service from which a particular customer is churning. For records that aren't subscription-based, Zia displays the churn score without any mention of a product.

How it works

The flow diagram below depicts the working of churn prediction in Zoho CRM:



Example scenario

Let's say you're a publishing company with various products ranging from newspapers to magazines. You have a customer who has been subscribed to your e-newspaper's premium plan for the past three years. During the past few months, this customer has been largely inactive in his business dealings with you. This might be a sign of customer dissatisfaction and a potential risk of churn. Zia will identify these trends and classify this customer as one with a high probability of churning. Based on these insights, you can take swift action to retain the customer.

<input type="checkbox"/> Customer Name <small>All ▾</small>	Email	Customer Churn Probability	Customer Owner
<input type="checkbox"/> Carissa Kidman	carissa.kidman@chanay.com	57	Kris Mckarthy
<input type="checkbox"/> Christopher Maclead	chris.maclead@chapman.com	12	Amelia Burrows
<input type="checkbox"/> Michael Ruta	michael.ruta@morlong.com	3	Felix Hirpara
<input type="checkbox"/> Tresa Sweely	tresa.sweely@dtiles.com	35	Felix Hirpara
<input type="checkbox"/> James Merced	james.merced@kwikkopy.com	78	Kris Mckarthy

Bottom line

- ✓ Proactively determine the probability of customer churn.
- ✓ Identify shortcomings and resolve them before actual churn.

Resources

To learn more about how to configure churn prediction in Zoho CRM, please review the documentation below:

- ✓ [Churn prediction - help documentation](#)

Prediction analytics

Why analyze your predictions?

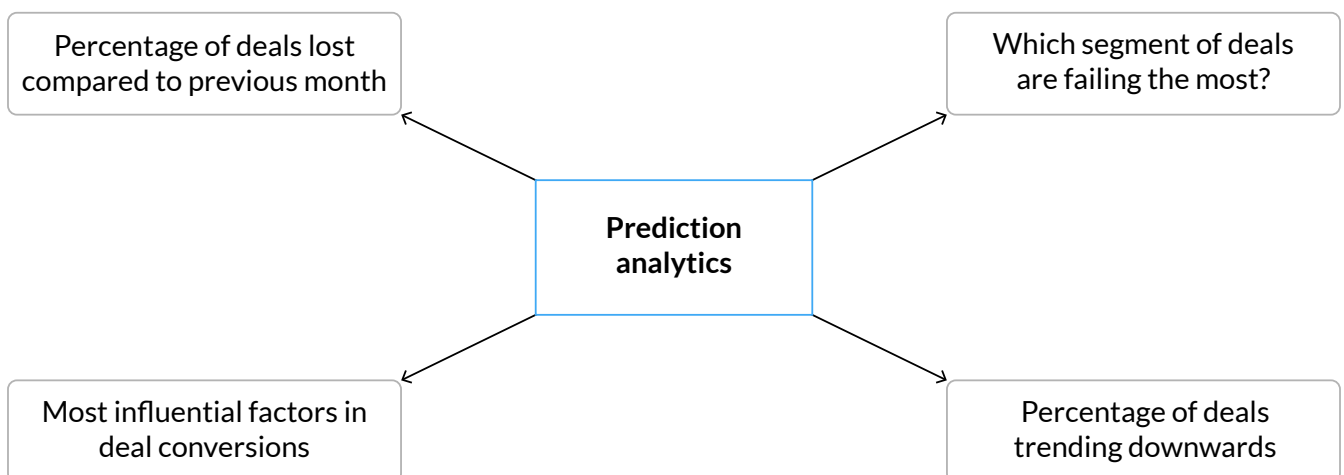
While you may have used predictions to understand customer needs and market trends better, you might not really know which factors Zia considered while generating them. You might also need to know how accurate the predictions were and which actions might be necessary—if any.

Prediction analytics in Zoho CRM

Zia's prediction analytics feature displays the data that was used as input to predict an outcome, such as the number of active predictions, prediction accuracy, the number of records involved in active predictions based on probability range, the number of records that uptrend or downtrend, and a time-based graphical representation of prediction accuracy over various periods of time and across various record owners. These analytics help you identify segments where the performance and quality of predictions are unsatisfactory so you can address them accordingly.

How it works

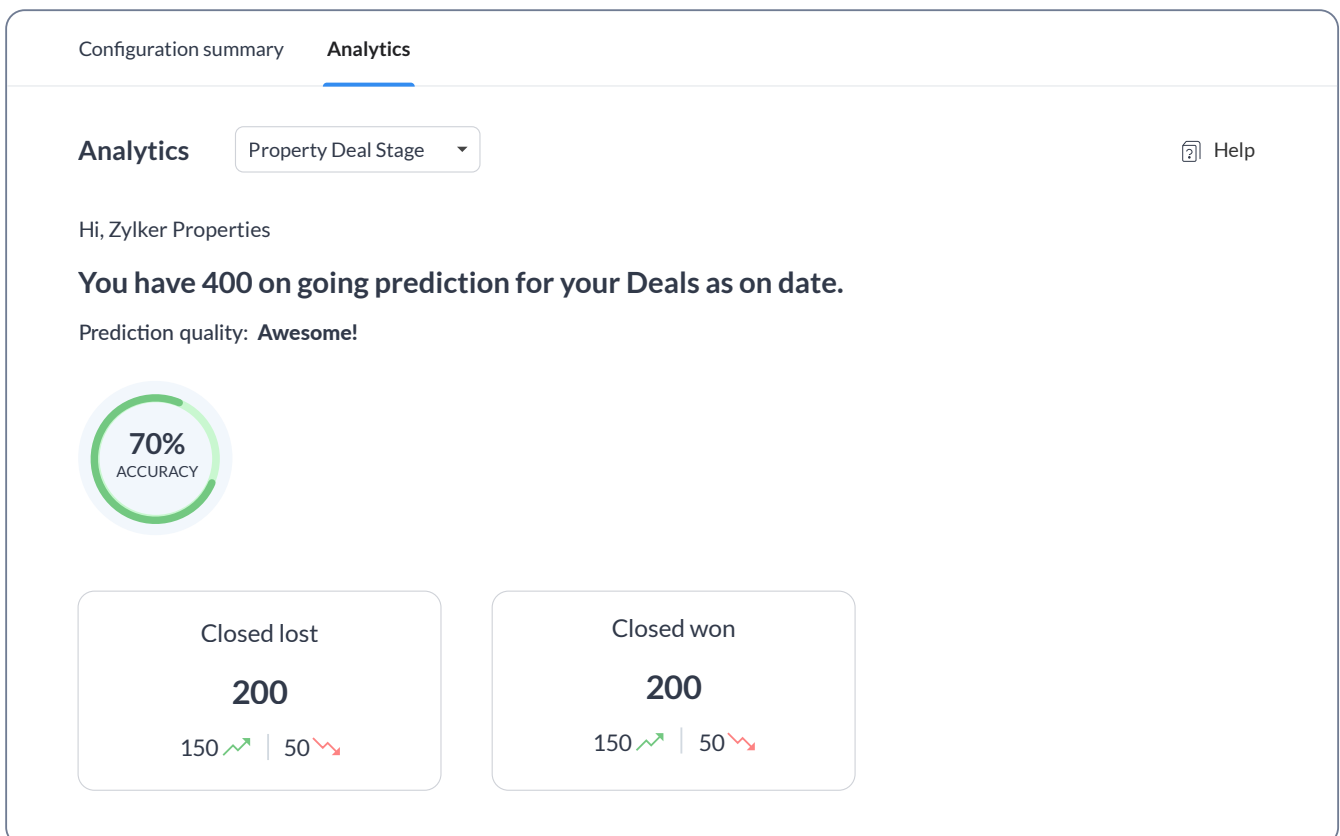
The flow diagram below displays some of the analytics that prediction analytics in Zoho CRM provides you with:

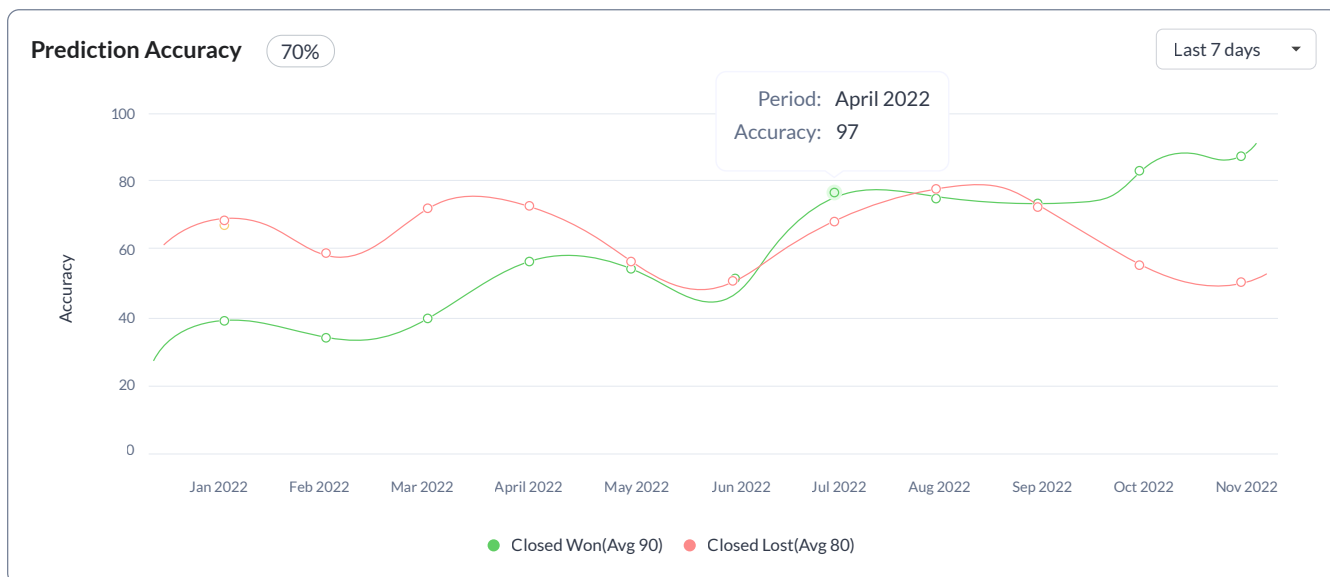


Example scenario

Let's say you run a real estate firm. You have your property deals listed in your Deals module and have created a prediction for the "Stage" field to determine which properties have the best chances of closing. The prediction provides you with the necessary insights for deal closure.

The prediction analytics feature states how accurate the prediction is, among various other performance insights. This helps you validate its accuracy and quality so you can decide on further courses of action as required.





Bottom line

- ✓ Identify factors that impact predictions.
- ✓ Measure prediction performance and quality.
- ✓ Understand sales rep impact on customer.

Resources

To learn more about how to configure prediction analytics in Zoho CRM, please review the documentation below:

- ✓ [Prediction analytics - help documentation](#)

Zia scores

Why assign scores to leads and deals?

Leads often have business requirements that require personalized solutions. You need to nurture and follow-up with your leads on a regular basis to have a higher chance of conversion. But how do you identify the right leads and relevant business deals for your organization? Zia analyzes and calculates scores for individual records. These scores help you identify records with the best chances of conversion. This way, you can prioritize your leads and deals accordingly.

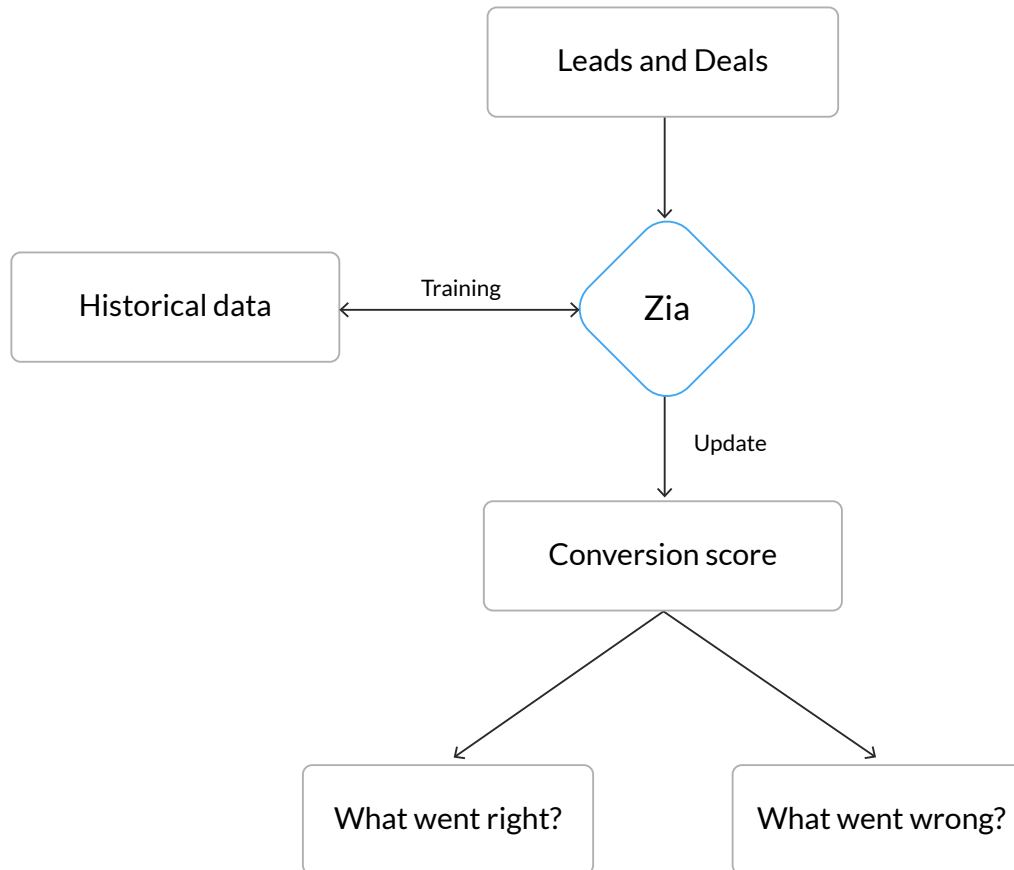
Zia scores in Zoho CRM

The Zia scores feature studies a particular record and assigns it a score. To assign scores, Zia analyzes information from the record, sales signals, related data, and data through integrations with other products. These scores represent the likelihood of conversion for a particular lead or deal, making it easier for businesses to prioritize their efforts and allocate resources more efficiently.

The score is automatically recalculated when there are changes to record fields, related records, or sales signals

How it works

The flow diagram below depicts the working of Zia scores in Zoho CRM:



Example scenario

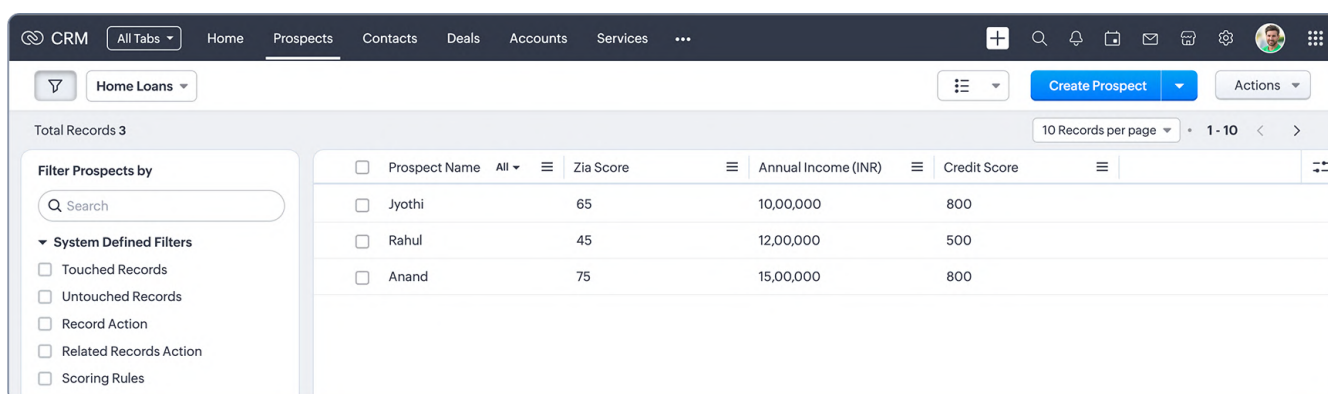
Consider that you run a bank in India. You want to identify the most eligible home loan requests. Assume you have three home loan requests and analyze all the eligibility criteria. This evaluation leads you to use income and credit scores as the differentiating factors in this case. The income and credit scores for the requests are as follows:

- Jyothi has an income of 10 lakhs per year. She has a credit score of 800.
- Rahul earns an income of 12 lakhs per year and has a credit score of 500.
- Anand makes 15 lakhs per year with a credit score of 800.

After evaluating these requests based on income and credit score, you can reach the following conclusions:

- Anand would be the most eligible customer for your home loan. Though he has the same credit score as Jyothi, he has a higher income.
- Jyothi would be the next best eligible customer. Her income is a bit lower than Rahul's but her credit score is much higher than his.
- Rahul would be the least eligible among the three, considering that his credit score is significantly lower to the other two customers, despite his decent income.

Hence Anand would be the ideal customer to consider approving a home loan, followed by Jyothi, and then Rahul. Zia studies such patterns and assigns scores to them to denote their chances of conversion.



<input type="checkbox"/>	Prospect Name	All	Zia Score	Annual Income (INR)	Credit Score
<input type="checkbox"/>	Jyothi		65	10,00,000	800
<input type="checkbox"/>	Rahul		45	12,00,000	500
<input type="checkbox"/>	Anand		75	15,00,000	800

Bottom line

- ✓ Identify and prioritize relevant leads and deals based on scores assigned by Zia.

Resources

To learn more about how to configure Zia scores in Zoho CRM, please review the documentation below:

- ✓ [Zia scores - help documentation](#)

AI forecasting

Why do you need AI forecasting?

Sales forecasting helps you estimate how your sales will fare in the upcoming quarter, fiscal year, or month, so you can devise your business plans accordingly. To achieve an accurate forecast, it's important to set targets that are realistic and productive at the organizational, team, and individual levels.

To devise optimal goals for your individual sales reps, you need to consider multiple factors, such as each rep's past performance, geographical location, and so on.

But manually analyzing and assigning targets to each rep is inefficient—not to mention tedious. Thankfully, Zia helps you avoid unnecessary busywork with its target achievement predictions for forecasts.

AI forecasting in Zoho CRM

Using its predicted target functionality, Zia suggests optimal targets for individual users and roles in the current forecast period based on targets achieved and deal closure patterns from previous periods. For example, if the past trend suggests that a rep usually achieves more than the set target, Zia can predict an ideal target for the rep that he is likely to achieve.

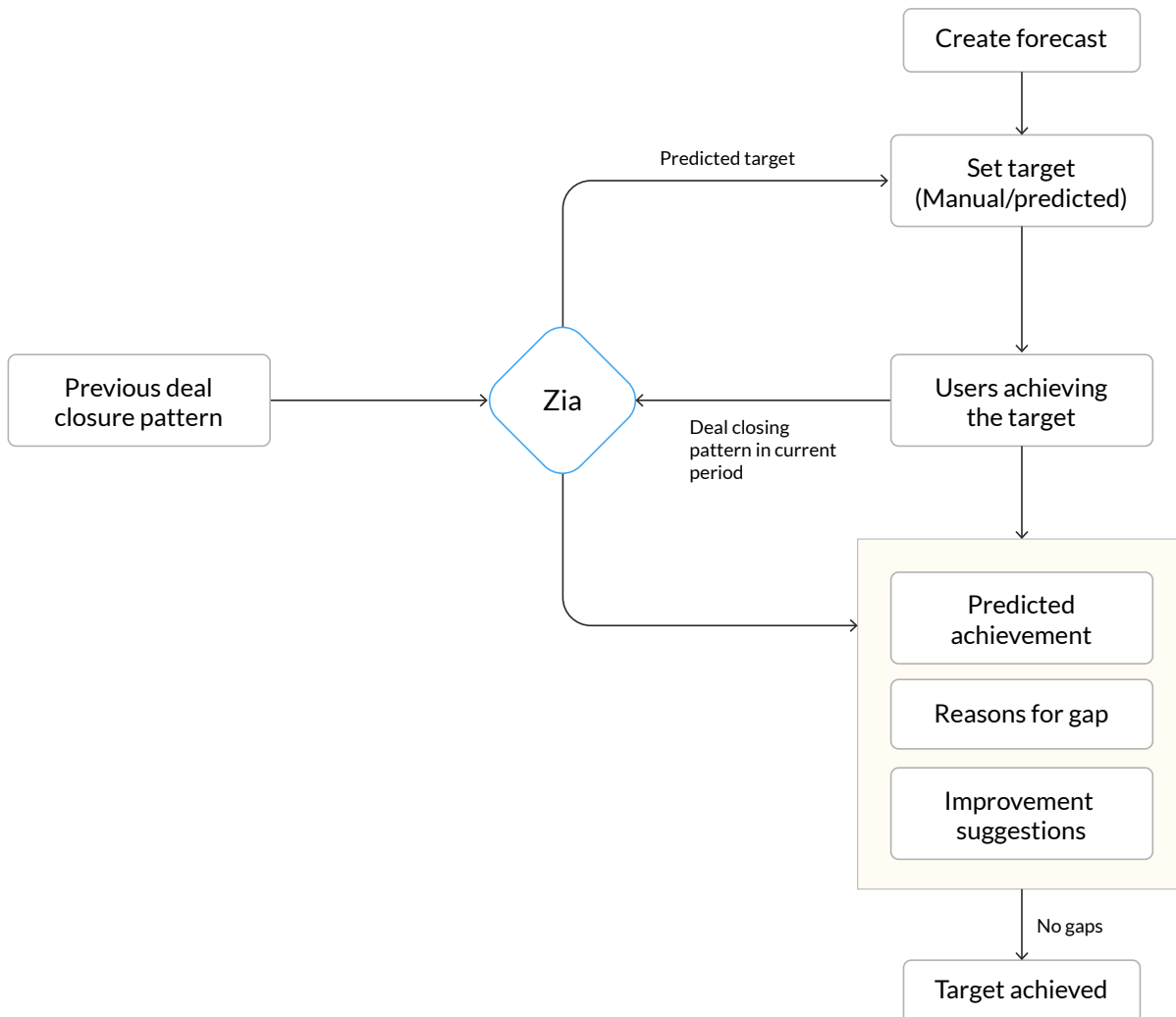
As part of the predicted achievement functionality, Zia predicts how much an individual user or a team is likely to achieve in the current forecast period based on targets achieved and deal closure patterns from both previous and current forecasts.

Zia provides various analytics for your forecast, such as a forecast overview, target achievement report, user and role performance metrics, and more. Using these analytics, you can get an overview and detailed breakdown of the performance of your forecast, users, and roles.

As part of the metrics, Zia also identifies gaps in the actual and achieved forecast targets and suggests actions to bridge those gaps.

How it works

The flow diagram below depicts the working of AI forecasting in Zoho CRM:



Example scenario

Let's say you want to create a forecast to analyze your sales potential for the upcoming quarter. Imagine you have an experienced sales rep, Emma, and one with less experience, Olivia. With her experience, Emma can bring in more sales and revenue, while Olivia might not be able to deliver as much. A high target would be overwhelming for Olivia, while a low target might be unproductive for Emma. It's important to strike an overall balance to frame a productive forecast. In this case, Zia will analyze past data and suggest targets that are relevant to Emma, Olivia, and your organization as a whole. It will also predict the achievements that Emma and Olivia are actually likely to achieve.

Create Forecast

Forecast Type

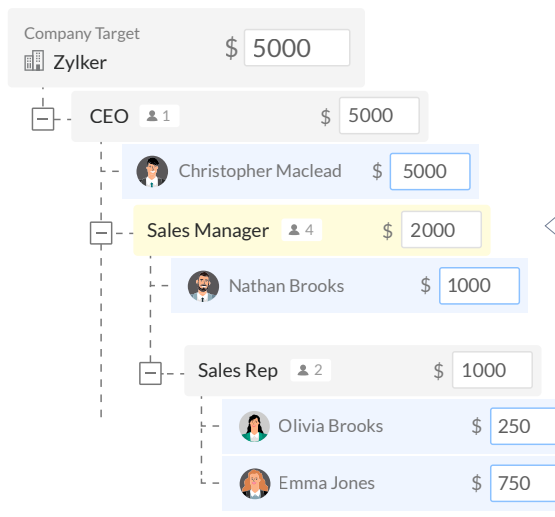
Forecast Period Quarterly Monthly

Forecast Name

Forecast on All Deals Selected Deals

Zylker Sales Forecast - Q1 2023 Deal Revenue

Set Target



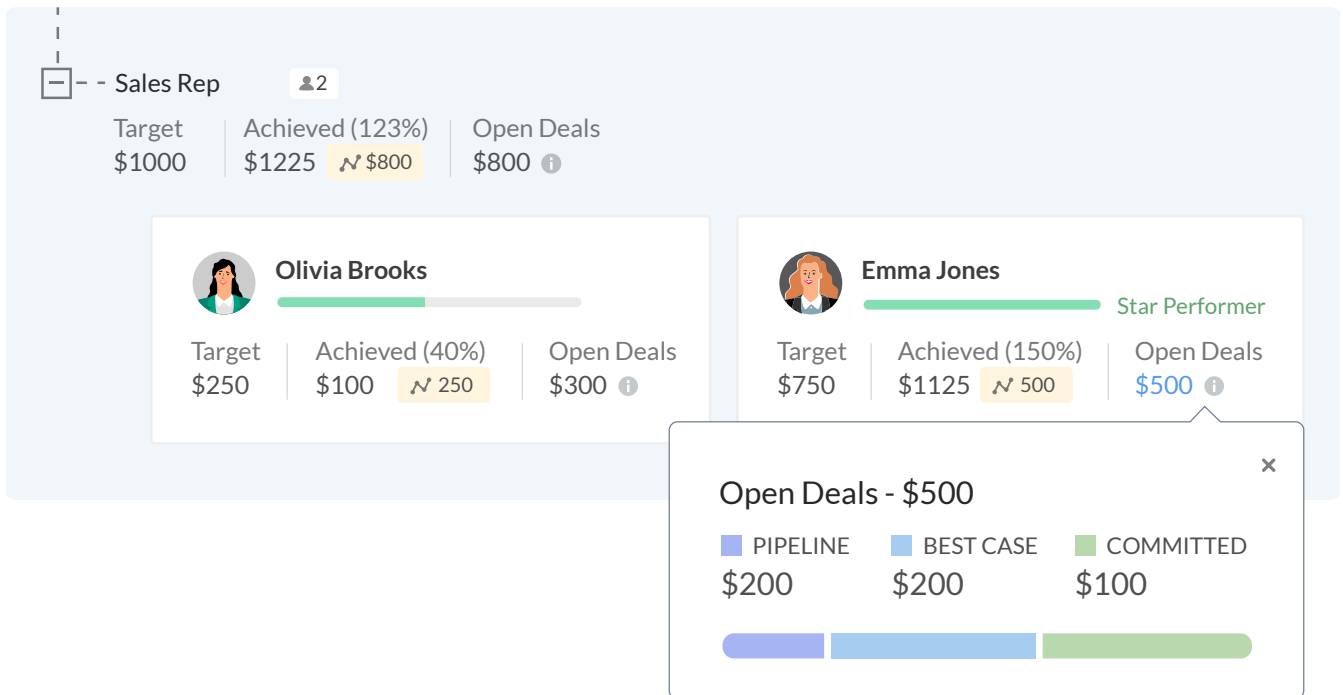
Total Values: \$4,000

Current Deals

- \$800 Pipeline
- \$1200 Best case
- \$1000 Commit
- \$1,000 Won

Predicted target **\$4,000**

56%	44%
Q4 - 2022 \$5,000 / \$9,000	Q3 - 2022 \$4,000 / \$9,000



Reasons for achievement gap i

60%
Gap found

Deals value not sufficient to close the target

- Current pipeline is 39% shortage from the target.

Low followed up

- No activity found in **5 Deals** since last two weeks

Improvements i

Focus on the high value Deals

- Your win rate on the high value Deal is 100% as 0% more than low value Deals. **1 Deal** in your pipeline have high value Deals.

Keep an eye on Deals that might be lost.

- **5 Deals** in pipeline have a chance to be lost. Last minute actions will resist the loss.

Bottom line

- ✓ Set ideal targets for your individual reps and organization as a whole in your forecasts.
- ✓ Track forecast performance and understand your reps' achievement probabilities.
- ✓ Resolve gaps in target achievements.

Resources

To learn more about how to configure AI forecasting in Zoho CRM, please review the documentation below:

- ✓ [AI in forecasts - help documentation](#)

Anomaly detection

Workflow anomalies

Why look out for anomalies in workflows?

Workflow rules help you automate several sales activities and save a lot of time and effort for sales reps. But in cases where there are conflicts or mistakes in these rules—such as when a lead or contact is sent the same email template twice on the same day—it can be difficult to identify these errors manually among the many workflows you may have set up. Zia helps you identify these anomalies.

Workflow anomalies in Zoho CRM

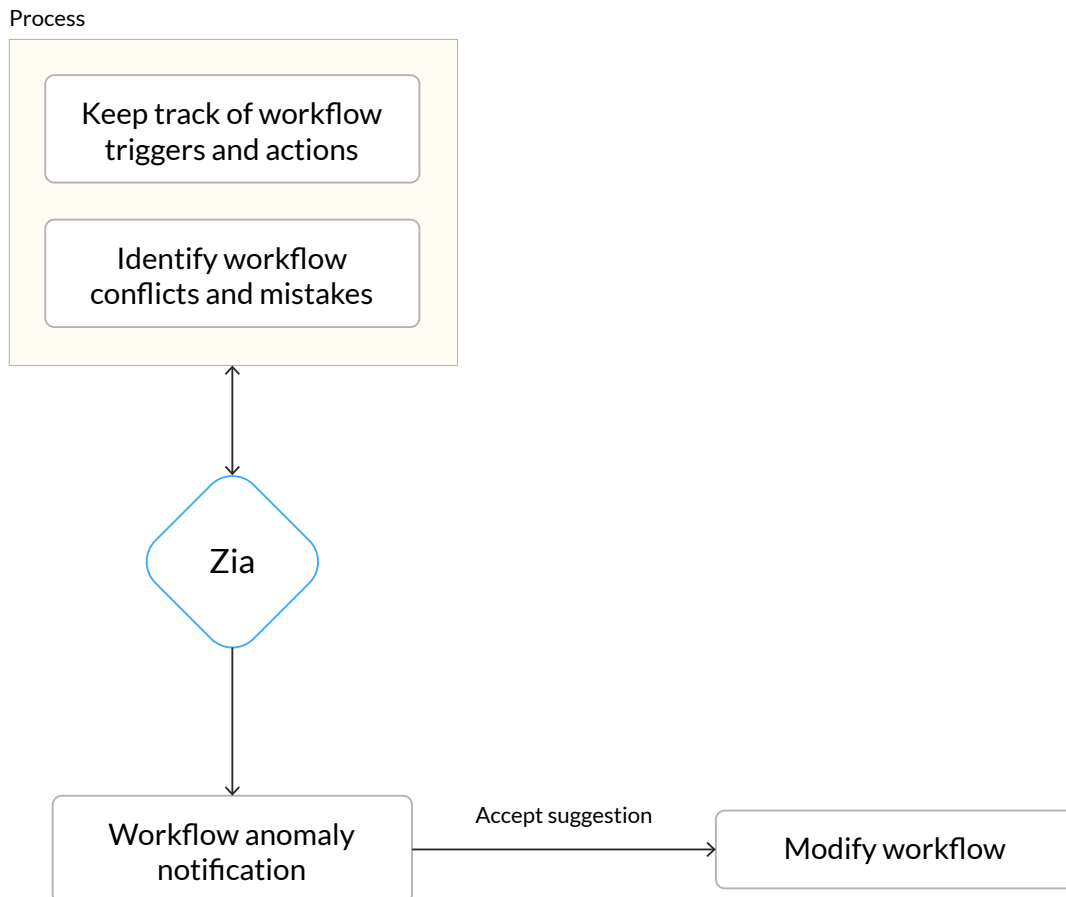
Zia detects anomalies in your workflow rules and provides relevant suggestions to enable you to identify and prevent conflicts and mistakes in them.

Zia identifies and notifies you of anomalies for the following scenarios:

- ✓ Untouched records created in the last seven days.
- ✓ Records created in the last seven days without email follow-ups.
- ✓ Anomalies in counts of records that were touched after modifying a workflow rule.
- ✓ Anomalies in email open rates after modifying a workflow rule.
- ✓ Anomalies in top-performing template open rates for workflow rules created in the last seven days.
- ✓ The same template for the same lead/contact is sent on the same day.
- ✓ The same lead/contact receives more than one template on the same day.

How it works

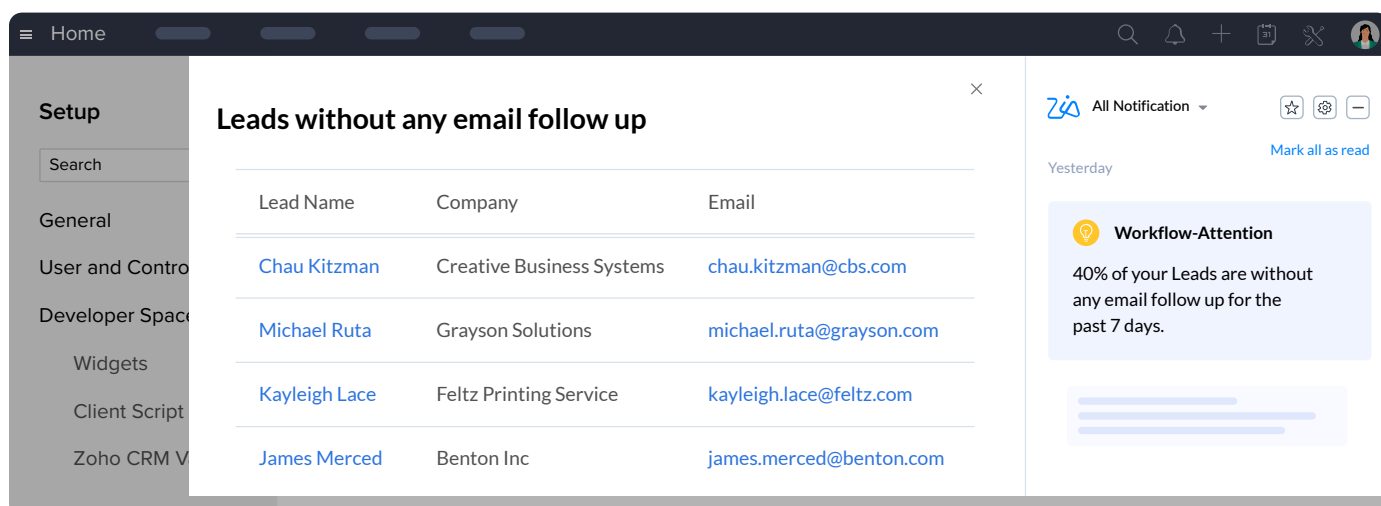
The flow diagram below depicts the working of workflow anomalies in Zoho CRM:



Example scenario

Let's assume you've recently added a good number of leads. Your reps haven't followed up with some of them through email since the leads were added. This could prove detrimental to your organization in converting those leads into customers. Zia notifies you of the percentage of leads that haven't been attended to in the last seven days via the Zia notification panel. This helps your organization avoid losing leads due to lack of follow-ups.

Workflow Rule	Anomaly Component	Recommendation	Zia for Emails
System Recommendations			
Zia is conditioned to alert you when it senses anomalies in your workflows.			
Notification Name	Notify Via	Status	
Untouched records created in the last 7 days.	Zia Notification	<input checked="" type="checkbox"/>	
Records created in the last 7 days without email followup.	Zia Notification	<input checked="" type="checkbox"/>	
Anomaly in email open rate after modifying a Workflow rule.	Zia Notification	<input checked="" type="checkbox"/>	



The screenshot shows the Zoho CRM interface. On the left is a sidebar with 'Setup' and various menu items. The main area displays a table titled 'Leads without any email follow up' with columns for Lead Name, Company, and Email. On the right, a notification panel shows a 'Workflow-Attention' alert: '40% of your Leads are without any email follow up for the past 7 days.'

Lead Name	Company	Email
Chau Kitzman	Creative Business Systems	chau.kitzman@cbs.com
Michael Ruta	Grayson Solutions	michael.ruta@grayson.com
Kayleigh Lace	Feltz Printing Service	kayleigh.lace@feltz.com
James Merced	Benton Inc	james.merced@benton.com

Bottom line

- ✓ Detect conflicts and mistakes in workflow rules.
- ✓ Avoid sending unintended emails to your leads and contacts.

Resources

To learn more about how to configure workflow anomalies in Zoho CRM, please review the documentation below:

- ✓ [Workflow anomalies - help documentation](#)
- ✓ [Workflow anomalies notifications - help documentation](#)

Trend analysis

Why analyze trends?

Assume you haven't been checking the progress of deal closure for a while and suddenly notice a drop in the revenue due to fewer closures. Now, unless you monitor the status manually, chances are you'll miss important details and fail to take action at the right time.

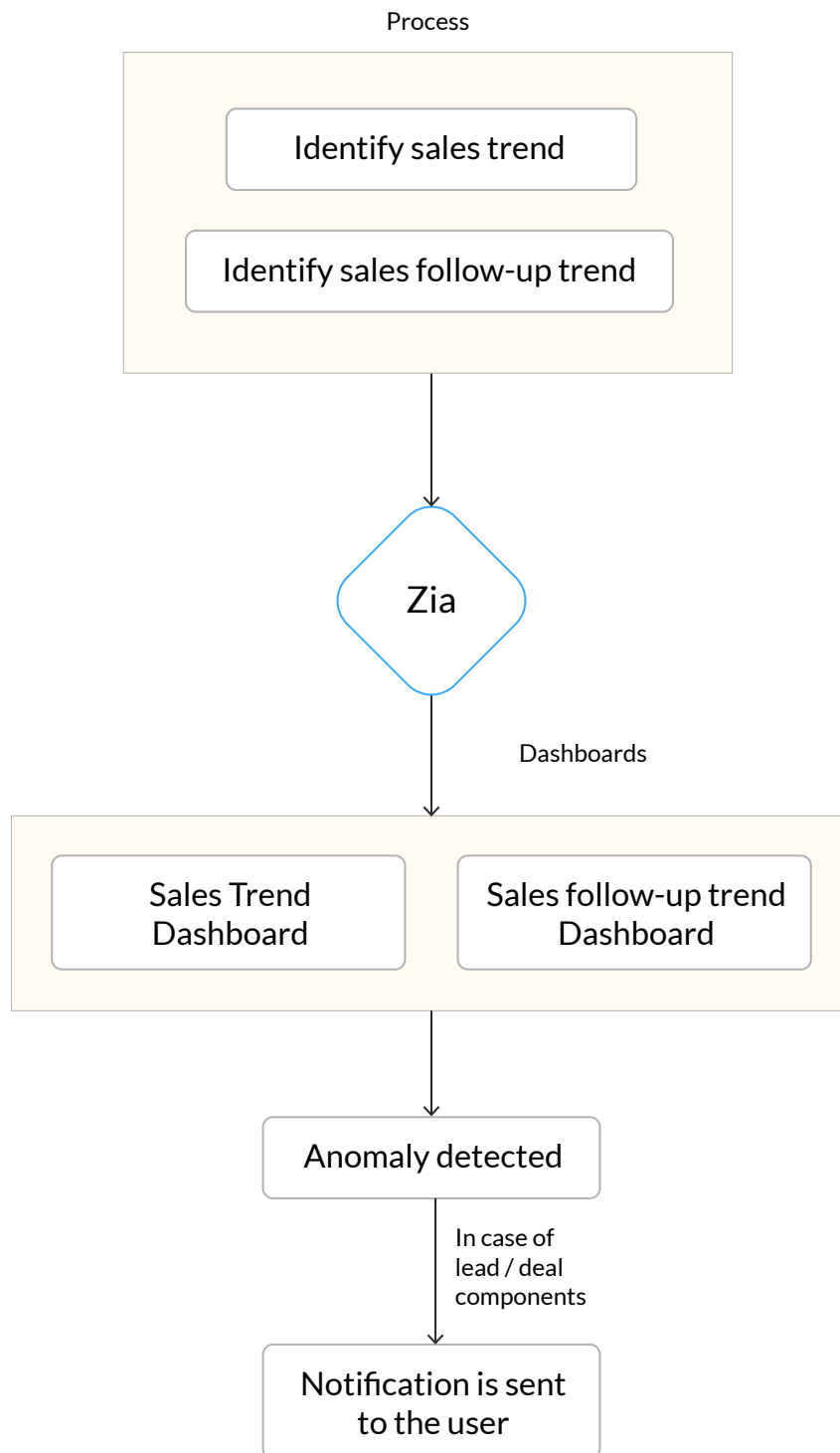
Trend analysis in Zoho CRM

Zia's trend analysis helps you track sales analytics without the need for regular manual monitoring. It details your sales trends, team performance, and charts out important sales metrics based on current and past data.

Zia also detects and notifies you of any anomalies in these patterns so you can identify problem areas and take action at the right time, or determine what's helping the growth of your business so you can invest in it more.

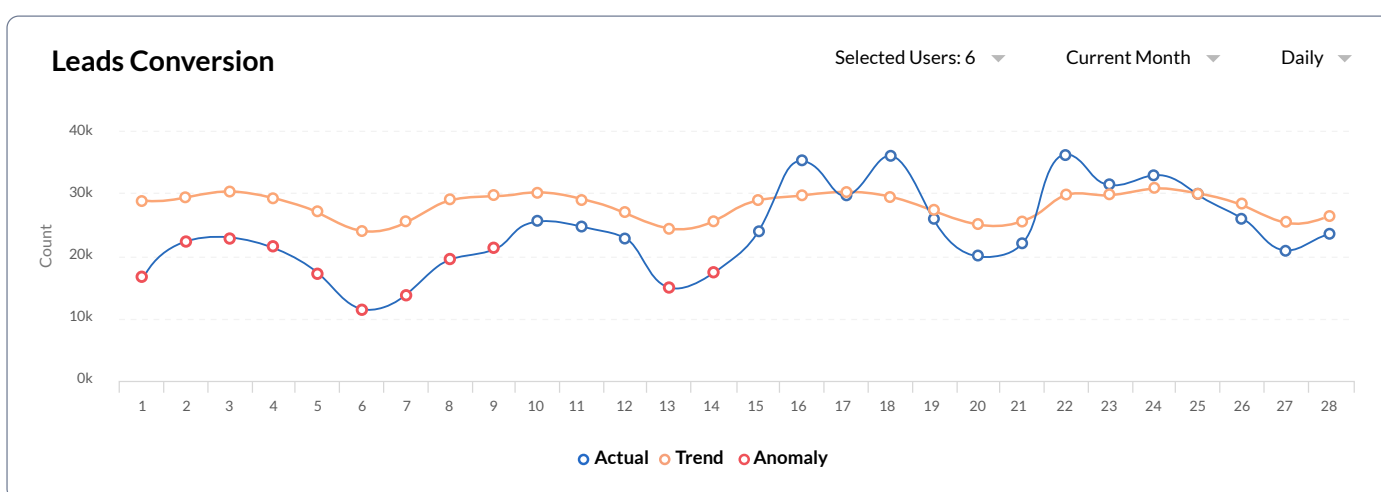
How it works

The flow diagram below depicts the working of trend analysis in Zoho CRM:



Example scenario

Imagine you haven't been tracking the status of lead conversions in your account for a while, so you're not up to date about the success of your lead conversions or the corresponding trends. Zia trend analysis provides you with sales metrics that help you understand your lead conversion trends.



Bottom line

- ✓ Track and understand sales metrics and trends.

Resources

To learn more about how to configure trend analysis in Zoho CRM, please review the documentation below:

- ✓ [Trend analysis - help documentation](#)

Anomaly detector

Why identify anomalies?

Market trends constantly change, which in certain instances might affect your business in an unusual manner as they significantly deviate from normal patterns. These trends might be beneficial or unfavorable to you, and will necessitate action from your end. Zia helps identify these anomalies.

Also, in your day-to-day business activities, it might not always be possible to keep an eye on your CRM—or, even if you are, you might not be continuously monitoring anomalies. To ensure you don't miss important information, Zia sends you anomaly notifications promptly.

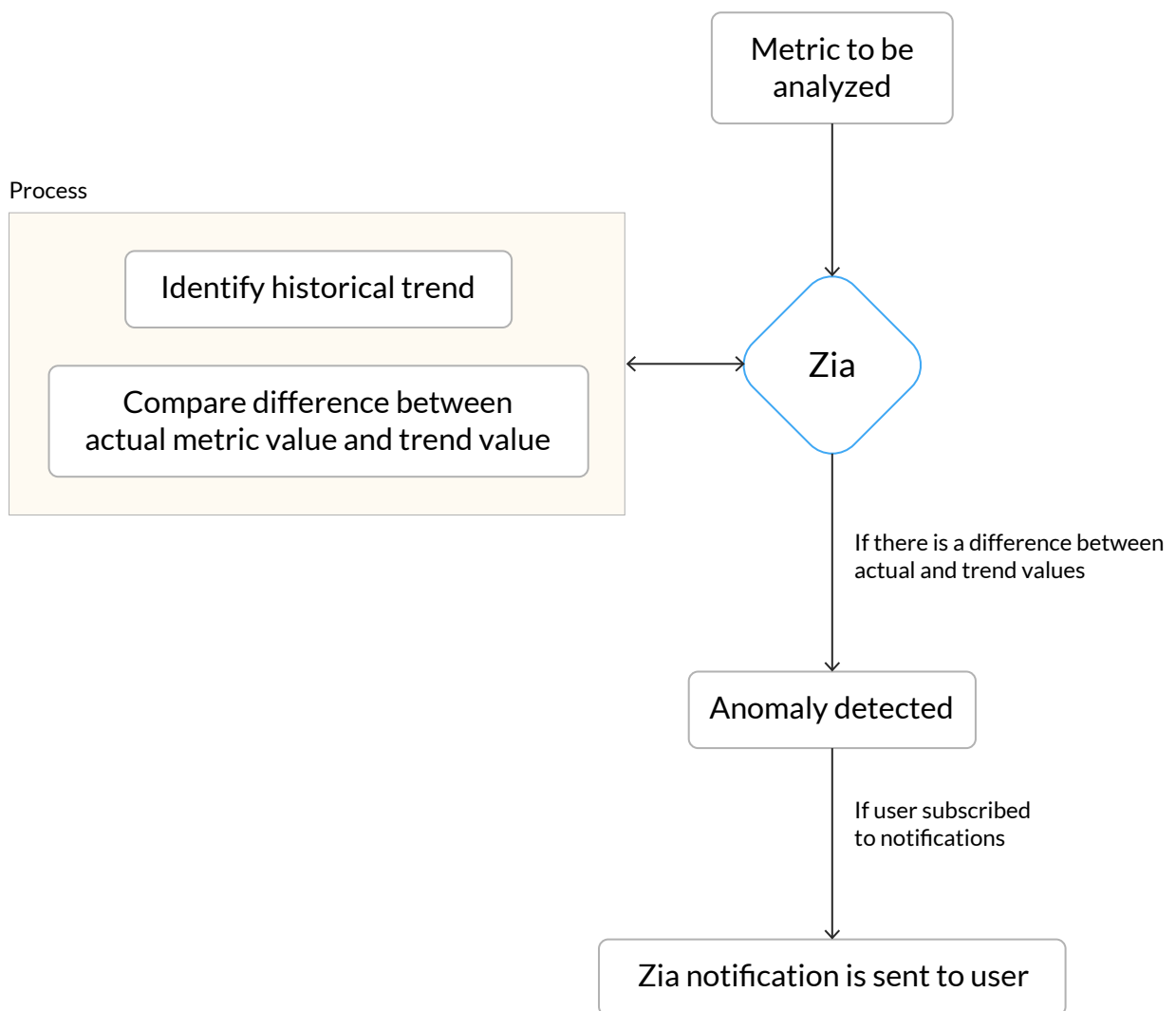
Anomaly detector in Zoho CRM

Zia helps you identify unusual or outlying events, records, or objects that represent significant deviations from your normal business activities and trends.

Zia computes the expected trend by monitoring current and past sales trends. When there are any deviations from this expected trend, they will be identified as anomalies. You can enable notifications for components that have been shared with you, which means your sales reps can also receive valuable notifications regarding anomalies without having to check those components manually on a routine basis.

How it works

The flow diagram below depicts the working of anomaly detector in Zoho CRM:



Example scenario

Imagine your organization manufactures cars for customers across the globe. Let's say in one region the sales of your cars see a significant decline from your usual sales pattern. Zia alerts you to this anomaly to help you understand the situation better and troubleshoot.

Add Anomaly Detector Preview Image ?

1. Component Name

2. Anomaly For

Deals Count of - Deals Closing Date - Deals

Criteria filter Remove

1 Stage is Closed Won -

AND

2 Country is India - +

Criteria Pattern (1 and 2) [Edit Pattern](#) ?

Compare with another metric ?

3. Anomaly Duration This Year Frequency - Monthly

4. Objective Consider increase in value as positive

Group By Select grouping

Cancel
Done



Bottom line

- ✓ Identify business-impacting anomalies.
- ✓ Receive anomaly notifications for anomaly detector and workflow anomalies components.

Resources

To learn more about how to configure the anomaly detector and notifications in Zoho CRM, please review the documentations below:

- ✓ [Anomaly detector - help documentation](#)
- ✓ [Anomaly notifications - help documentation](#)
- ✓ [Anomaly notifications for custom components - help documentation](#)

Recommendation

Recommendation builder

Why seek product recommendations?

Without proper customer analysis, you might end up approaching customers with products or services that they don't need—or at least not in the form that they want it. Hence, it's important to understand customer interests and requirements by analyzing their behavioral and buying patterns so you can offer them products and services that are relevant to them. As in most cases, manual analysis for a wide range of customers with a variety of interests and needs is an extremely daunting task.

Zia provides your sales reps with product or service recommendations to help them approach customers with the appropriate offerings.

Recommendation builder in Zoho CRM

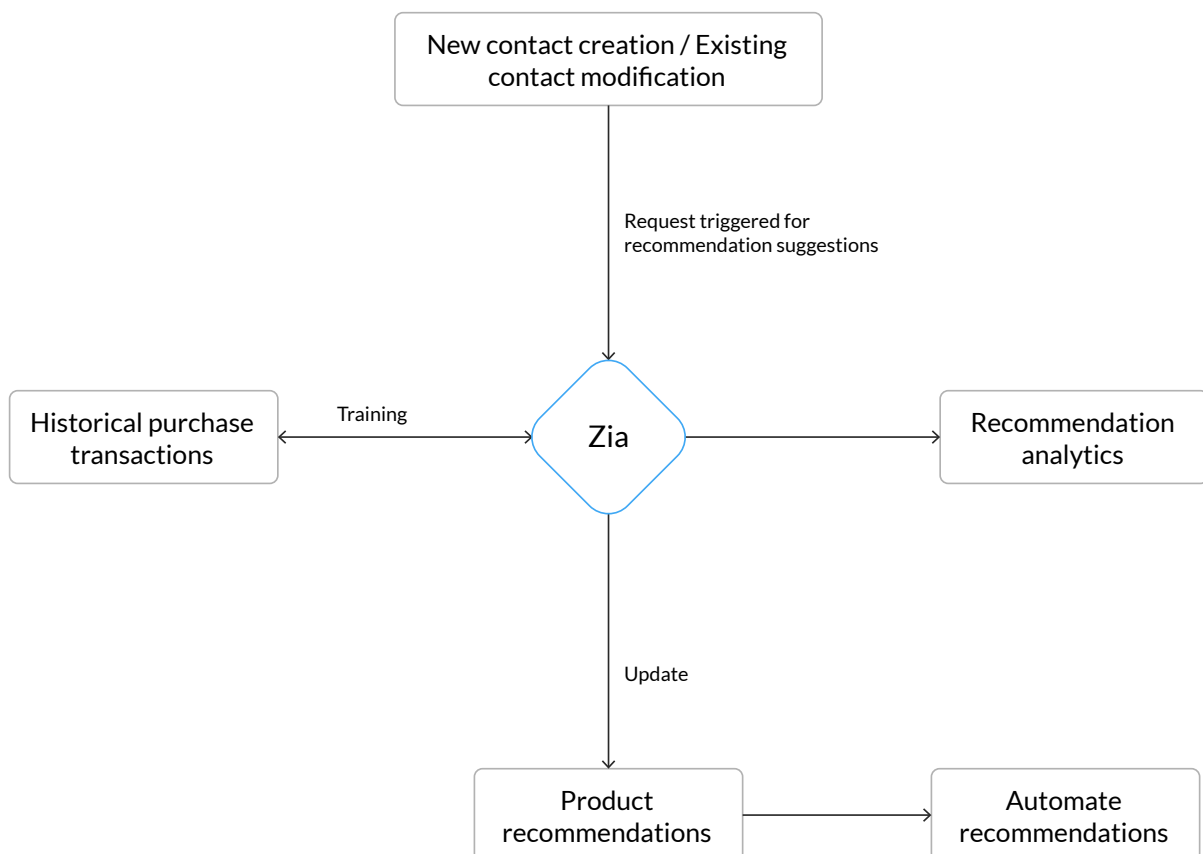
Zia identifies and analyzes customer data like purchase details, interests, requirements, and behavioral patterns in order to suggest the most relevant products and services. In formulating recommendations, the AI assistant also compares customers' behavioral patterns to those of other customers with similar attributes.

You can create your own recommendation models according to your varying business needs and set up notifications to send recommendations to your reps. They can use these recommendations to provide your customers with the right products and services, and also improve cross-selling. Furthermore, notifications can be sent everyday or every week and refined according to custom criteria so that notifications detail only selected products, services, deals, and so on.

You can also create workflow rules based on Zia recommendations and automate actions to be performed on the records before, after, or on the day of recommendation for a product or deal that a customer is deemed likely to purchase based on past purchases.

How it works

The flow diagram below depicts the working of recommendation builder in Zoho CRM:



Example scenario

Let's say you're running an ecommerce business selling various television brands. One of your customers is looking to buy a television and has purchased a significant number of other electronic items from a particular brand. Zia scans through the existing customer data and recommends television models from that particular brand.

You can also provide access to this recommendation for the respective record owner, enabling the record owner to offer more meaningful solutions to the customer and improve overall engagement.

Builder
System Recommendations
Analytics

Create New Recommendation

Recommendation name

What to Recommend?

Select module

Criteria All Records Selected Records

Linking module that stores information between Accounts and Products?

Select module

Criteria for Deals completion state

1

+

Duration ⓘ

Save
Cancel

Overview
Timeline


Contact Owner **Melinda Anderson**

Email leota-diliard@hotmail.com

Phone 312-436-2083

Residing country **USA**

Recommendation



Relationship

Zylker 80 cm (32 inches) TV

\$199

Black

Last buy **Zylker Laptop 15-inch**

[Know more](#)

Reference contacts

Bottom line

- ✓ Enhance customer experience with appropriate product suggestions to your customers.
- ✓ Improve cross-selling and upselling.
- ✓ Custom recommendations for any standard or custom module.
- ✓ Automate and notify relevant recommendations to your sales reps.

Resources

To learn more about how to configure the recommendation builder in Zoho CRM, please review the documentation below:

- ✓ [Recommendation builder - help documentation](#)

Recommendation analytics

Why track the effectiveness of product recommendations?

While Zia's recommendations help you pitch the right products to your customers, there might also be instances where a recommendation model doesn't work for your organization. It's important to know how Zia's recommendations align with your business and optimize them so that they suit your customers' needs.

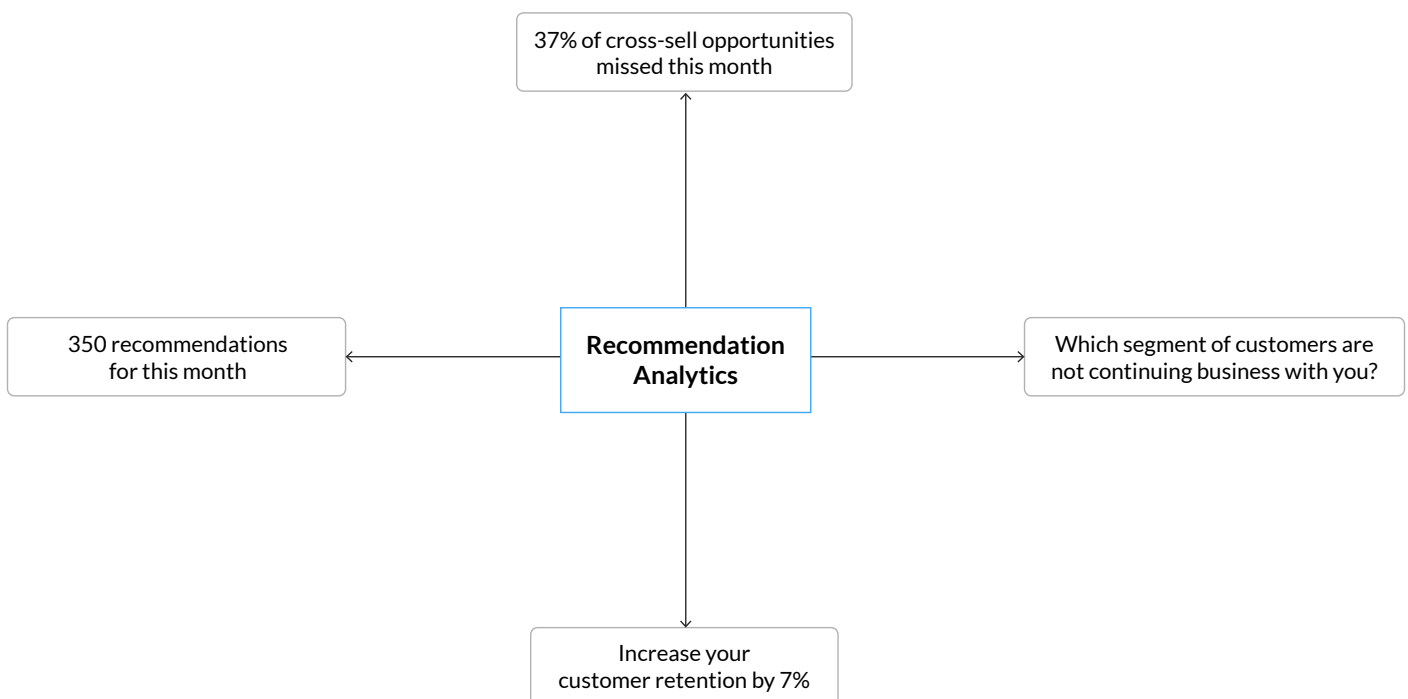
Recommendation analytics in Zoho CRM

Zia's recommendation analytics provides you with an overview of the analytics involved in generating recommendations. The analytics include the number of active recommendations, the success rate of each recommendation, recommendation trends, and more.

These analytics enable you to understand the performance and relevance of the recommendation tool and modify it as per your business requirements.

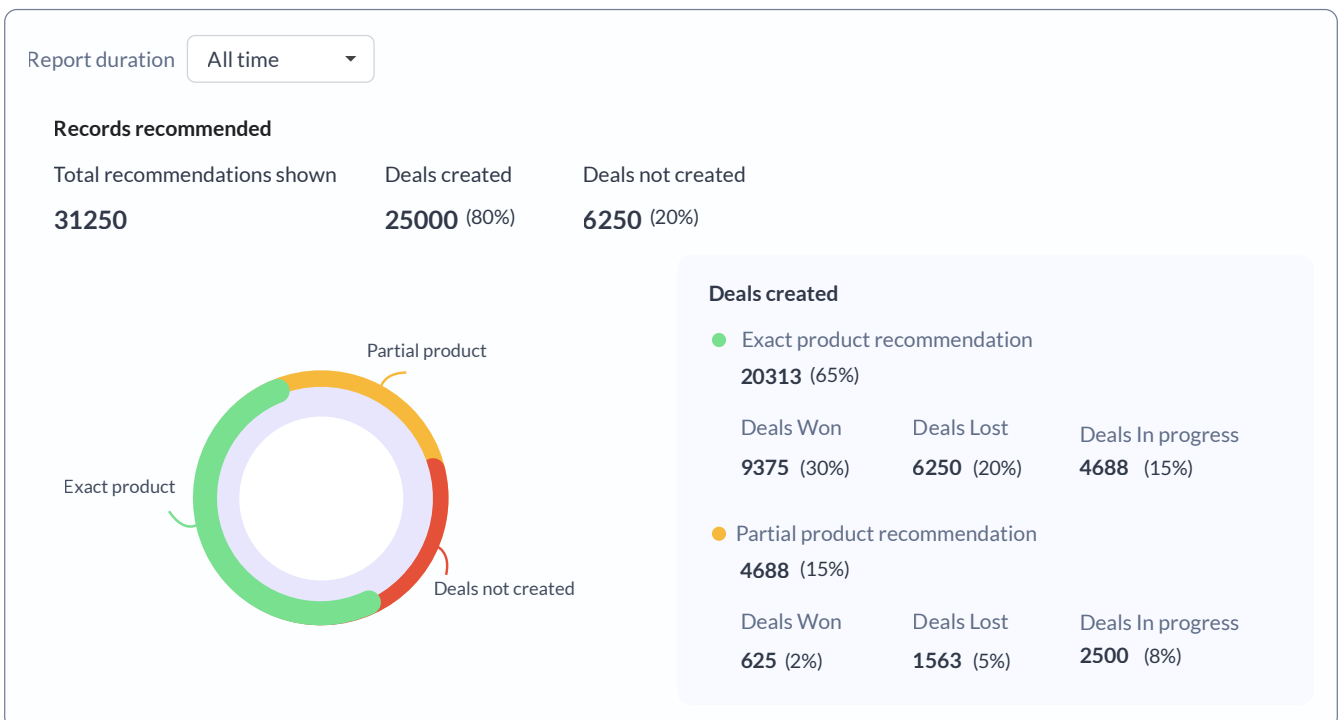
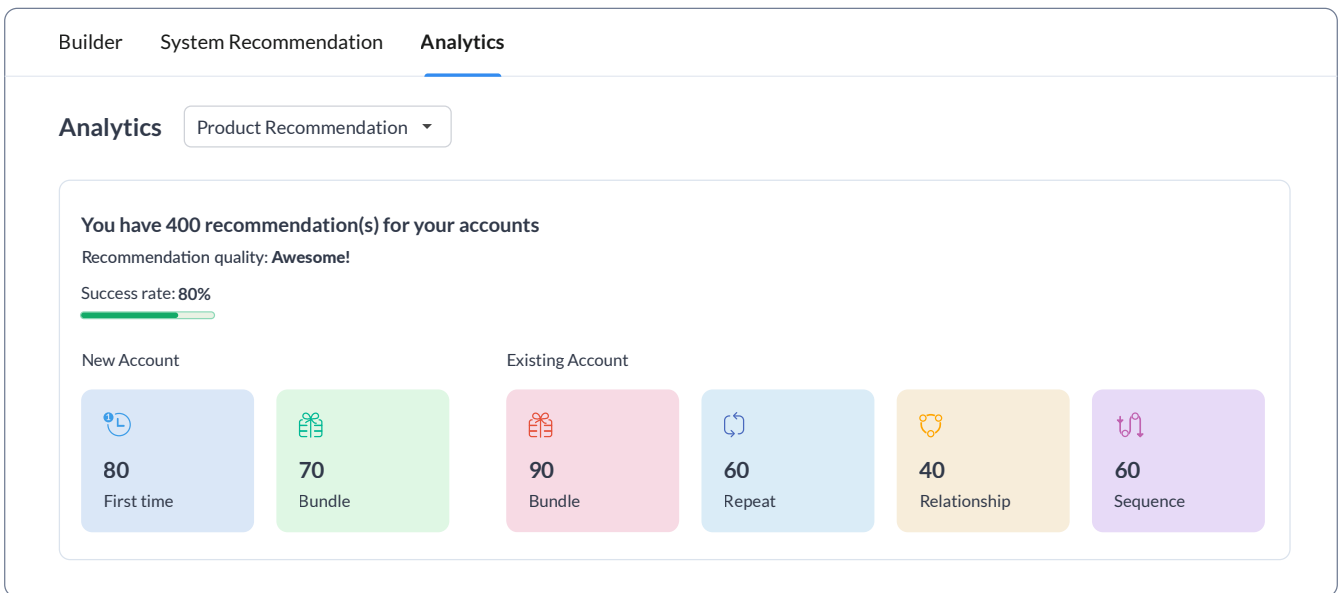
How it works

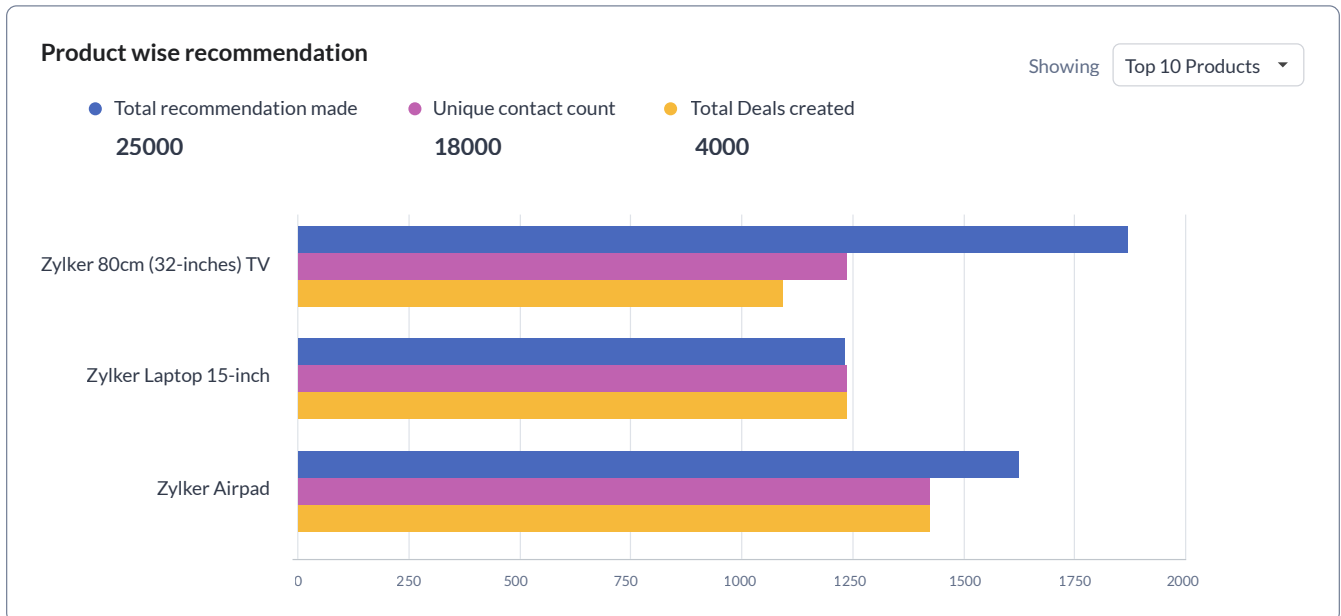
The flow diagram below displays some of the analytics that recommendation analytics in Zoho CRM provides you with:



Example scenario

Consider the previous example in which you recommend television models of a particular brand to a certain customer. Zia’s recommendation analytics details how effective this recommendation model is. Based on that assessment, you can decide how suitable the model is for your business needs and implement necessary changes.





Bottom line

- ✓ Measure recommendation model performance.
- ✓ Transform recommendations and align them with customer needs.

Resources

To learn more about how to configure recommendation analytics in Zoho CRM, please review the documentation below:

- ✓ [Recommendation analytics - help documentation](#)

Similarity recommender

Why look out for similarities between records?

Your sales reps need a proper understanding of their customers' needs in order to understand how a deal is likely to progress through the different stages in the sales process. Fortunately, there's a good chance other reps have handled similar deals before, so your reps can use them for reference.

Manually scanning through all your records to identify similar records is tiresome. Zia's similarity recommender can identify similarities between contacts, products, deals, and other records to make your sales reps better-equipped to handle deals.

Similarity recommender in Zoho CRM

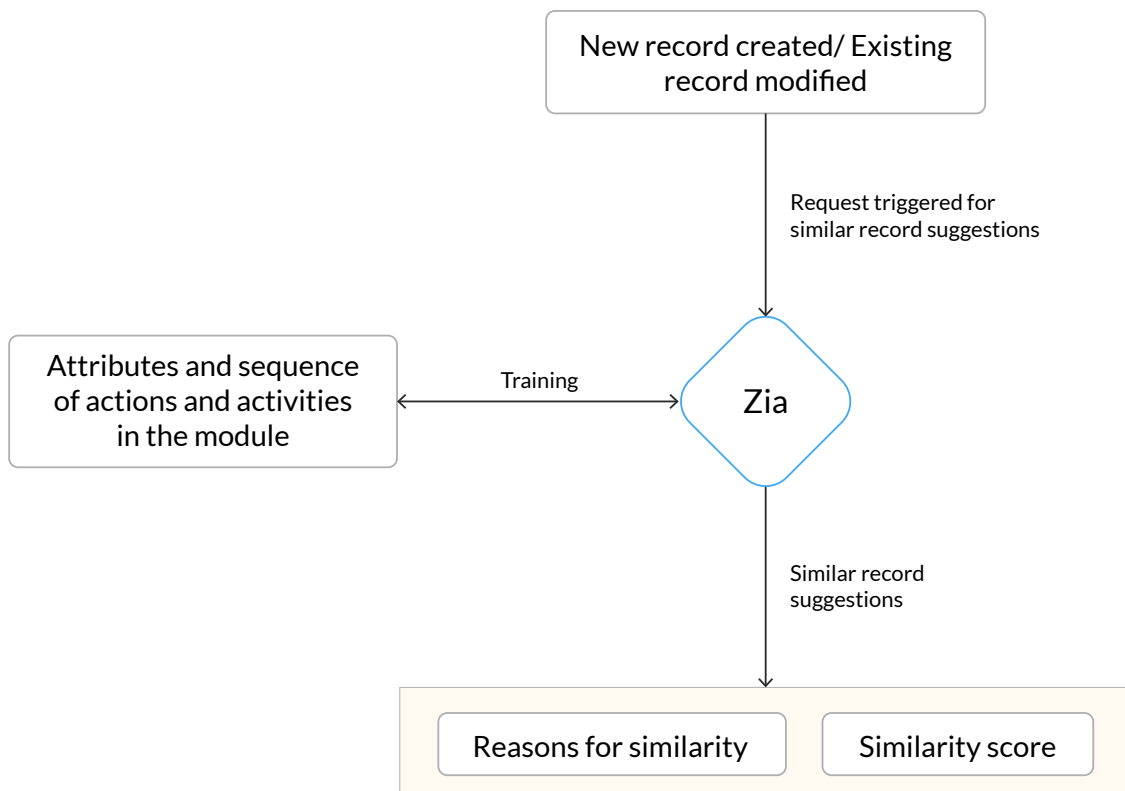
Zia's similarity recommender is a handy tool that compares one record with other records present in the module, identifies any similarities between them, and displays the five most similar records as recommendations.

The tool also indicates which factors are similar across records, such as revenue, geographical location, or industry.

Your sales reps can use this information to understand how a previous deal went through various stages and therefore to implement the appropriate measures to ensure the deal is successfully closed.

How it works

The flow diagram below depicts the working of Zia's similarity recommender in Zoho CRM:



Example scenario

Let's say you run a real estate business. A customer has recently bought a villa from you.

You have a similar villa deal around the same price range with a prospect.

Zia lists your previously successful villa deal as a similarity recommendation and indicates what the similarities are. Your sales reps can leverage this similarity data to approach the new prospect with an effective sales pitch.

Create New Rule

Rule Name

Similarity recommendation for

Criteria All Records Selected Records


Overview Timeline

Deal Owner Amelia Burrows

Email burrows.amelia@zylker.com

Phone 332-936-2383

Similar Deals



Villas

\$170,000,000

423,345 sq.ft

Similarity score 70

Why is this deal similar?

- Property Type is Villa
- City is Beverly Hills
- Expected revenue > \$150,000,000

Bottom line

- ✓ Understand customer needs and potential solutions through similar existing records.

Resources

To learn more about how to configure the similarity recommender in Zoho CRM, please review the documentation below:

- ✓ [Similarity recommender - help documentation](#)

Workflow suggestions

Why use workflow suggestions?

By creating workflow rules, you're identifying repetitive and predictable tasks and automating them—thereby saving your reps' time and effort. Just as performing these repetitive tasks consumes time, identifying them can also end up consuming much of your time. Zia workflow suggestions can identify repetitive tasks for you and suggest corresponding workflows.

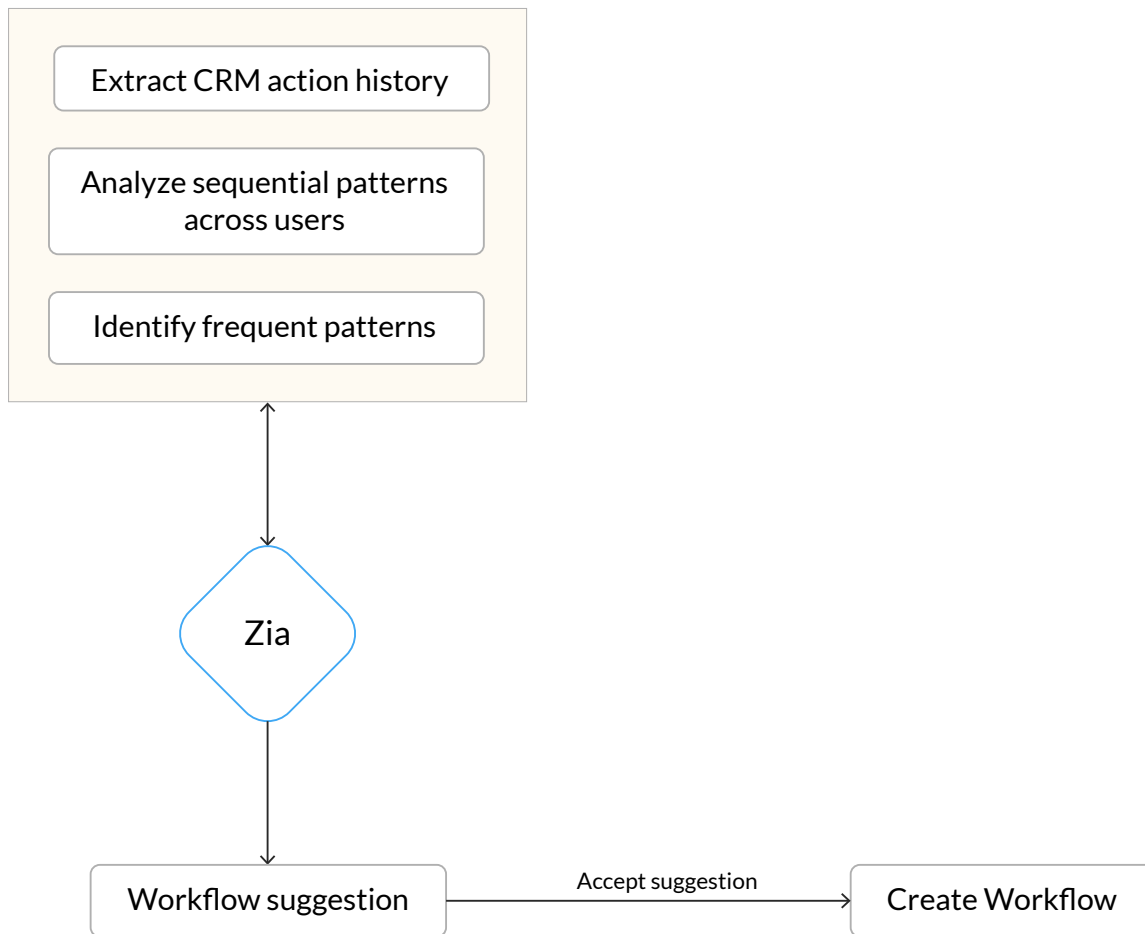
Workflow suggestions in Zoho CRM

Zia suggests workflow rules by analyzing recurring actions performed in your organization's CRM account. When multiple users in your organization perform the same specific actions, Zia suggests that you create workflow rules for these actions with relevant criteria, and notifies you each time it suggests a workflow rule for your organization. You can remove or modify suggested workflows by adding or removing criteria or actions as needed.

How it works

The flow diagram below depicts the working of workflow suggestions in Zoho CRM:

Process



Example scenario

Let's assume that when the value of the closing date field in the Deals module is two days away from its resolution time, most of the users in your organization regularly set the priority field as urgent. Zia now identifies this trend and suggests a workflow rule to automatically set the priority field value to urgent when the closing date is two days away.

Builder Analytics System Recommendations

System Recommendations

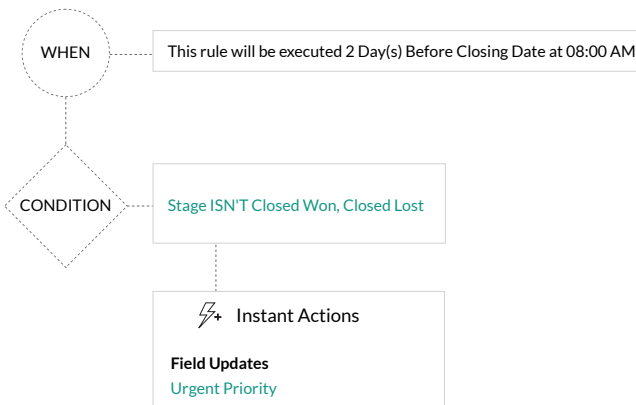
Zia analyzes and learns from every single process your organization execute inside CRM. These customized recommendations will improve the way you work.

Macro Suggestion

Workflow Suggestion

Zia suggested Workflow for Deals

Save 5 minutes per month of your team's time by creating the below suggested workflow.



```

graph TD
    WHEN((WHEN)) --- Rule[This rule will be executed 2 Day(s) Before Closing Date at 08:00 AM.]
    Rule --- CONDITION{CONDITION}
    CONDITION --- Stage[Stage ISN'T Closed Won, Closed Lost]
    Stage --- Actions[Instant Actions]
    Actions --- Updates[Field Updates  
Urgent Priority]
        
```

[Create as Workflow](#)

All Notification

Yesterday

Workflow - Suggestion

Maximise your team's productivity by automating some routine activities. Zia has got some tailor-made workflow suggestions for you.

Tuesday, Nov 8

Workflow - Attention

40% of your Deals are without any email follow up for the past 7 days.

Bottom line

- ✓ Automatically identify repetitive tasks.
- ✓ Create workflow rules based on Zia's suggestions.

Resources

To learn more about how to configure workflow suggestions in Zoho CRM, please review the documentation below:

- ✓ [Workflow suggestions - help documentation](#)

Owner assignment suggestions

Why would you need owner assignment suggestions?

Every record is unique and needs the most appropriate record owner to handle it based on its unique traits. Manually scanning through records to assign record owners is exhausting and time-consuming. To help make it easier, Zia can suggest owner assignments based on various factors.

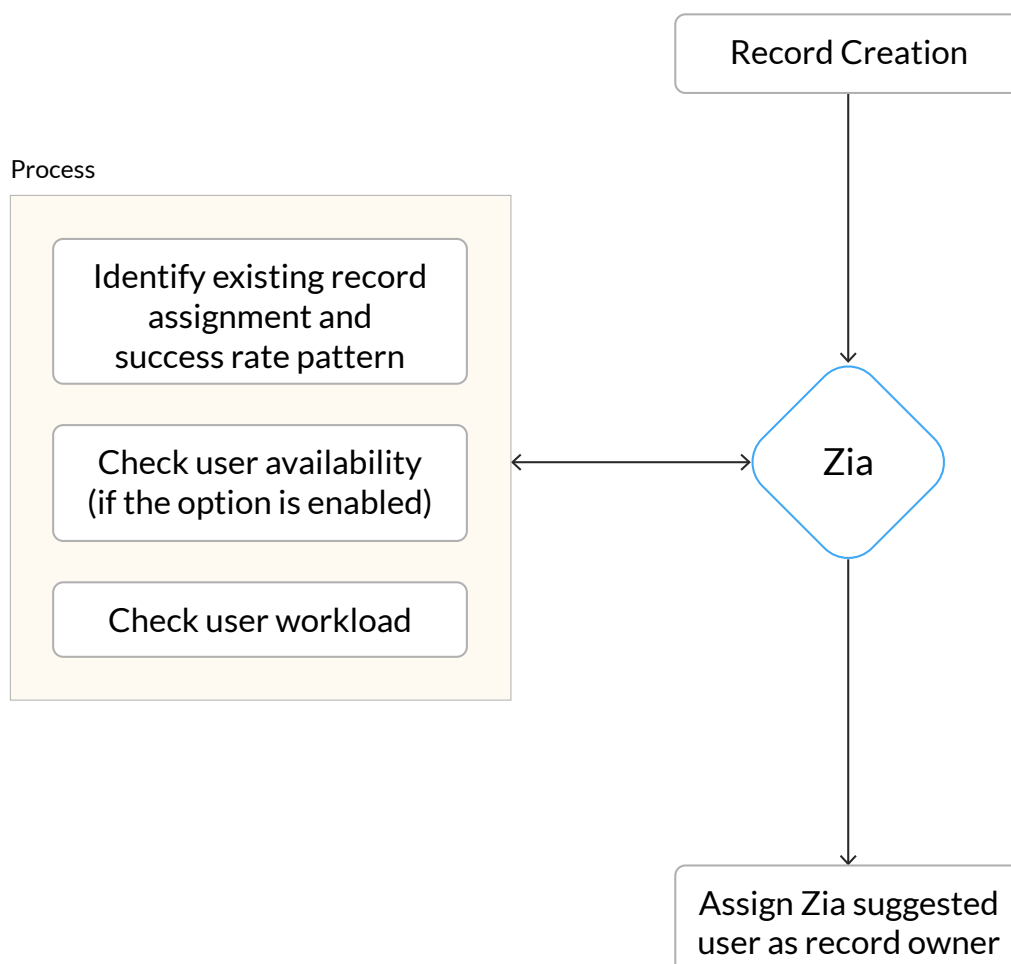
Owner assignment suggestions in Zoho CRM

Zia studies existing assignment patterns to determine which owner is most suitable for a record. The AI assistant accounts for all relevant fields to identify a pattern.

Another influential factor is the user threshold, which is the number of records a user can handle per day, week, or month. This factor helps Zia avoid overloading or under-loading a user with too many or too few records, respectively.

How it works

The flow diagram below depicts the working of owner assignment suggestions in Zoho CRM:






Example scenario

Let's say a rep in your organization—Robert—takes care of leads from the UK-based manufacturing industry, while another rep—Anil—handles leads from the India-based real estate vertical. Zia studies the records in your organization and understands which kinds of records are owned by which users. When a UK-based lead from the manufacturing industry reaches out to your organization, Zia suggests that the record be assigned to Robert, while also suggesting that any Indian-based leads from the real estate industry be assigned to Anil.

Rules Thresholds **Zia**

User pattern determined by Zia ⓘ

Users: 

Pattern 1	Count : 2	Users	User Count : 1
IF Industry is Manufacturing AND Region is UK		 Robert robert.s@zylker.com	
Pattern 2	Count : 2	Users	User Count : 1
IF Industry is Real Estate AND Region is India		 Anil anil.v@zylker.com	

Bottom line

- ✓ Assign records to the most appropriate owners.

Resources

To learn more about how to configure owner assignment suggestions in Zoho CRM, please review the documentation below:

- ✓ [Owner assignment suggestions - help documentation](#)

Macro suggestions

Why would you need macro suggestions?

You can execute multiple actions simultaneously for a group of records by building all of your routine actions into a macro. Also, you can further reduce your efforts by letting Zia identify these actions for you.

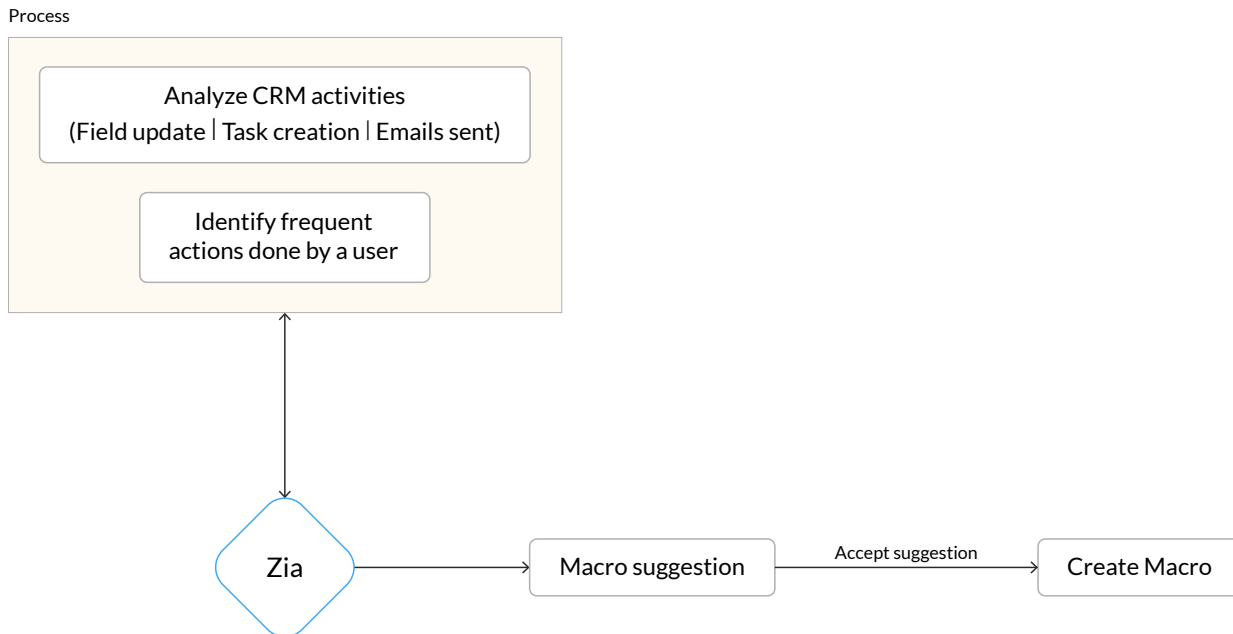
Macro suggestions in Zoho CRM

Similar to workflow suggestions, Zia auto-suggests macros for you to create based on your CRM activities. If you've been repeating the same set of actions over a period of time and on multiple records, Zia will automatically suggest that you create macros for these actions.

While workflow suggestions suggest you to create workflow rules based on recurring actions performed by many users in your organization, Zia offers macro suggestions to individual users based on recurring actions performed by those particular users.

How it works

The flow diagram below depicts the working of macro suggestions in Zoho CRM:

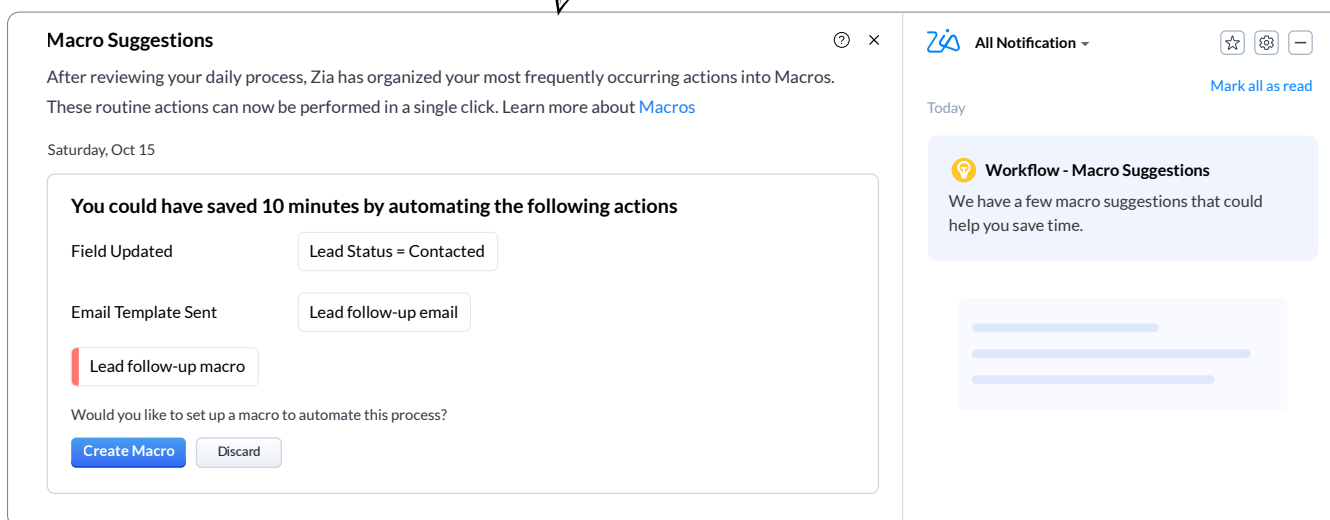
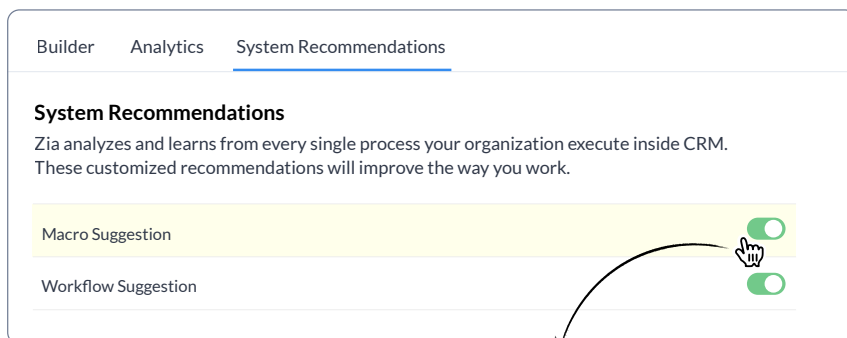


Example scenario

Let's say you perform a set of actions for leads created seven days ago and with whom you're yet to establish communication. Those actions are as follows:

- ✓ Send a follow-up email
- ✓ Update the lead status field to "Contacted"

You perform these actions on a daily basis and ensure that these leads are sent a follow-up email to improve your lead engagement and conversion. Zia will suggest that you create a macro out of these actions.



Bottom line

- ✓ Get automatic macro suggestions.

Resources

To learn more about how to configure macro suggestions in Zoho CRM, please review the documentation below:

- ✓ [Macro suggestions - help documentation](#)

Next best experience

Why would you need next best experience suggestions?

Every customer journey—from lead nurturing to deal closure—involves various stages. Different prospects have different challenges along the journey, some of them stuck in one stage and others in another stage. With Zia's next best experience suggestions, you can provide your prospects with the best possible experience by resolving their unique challenges at various stages throughout the customer journey.

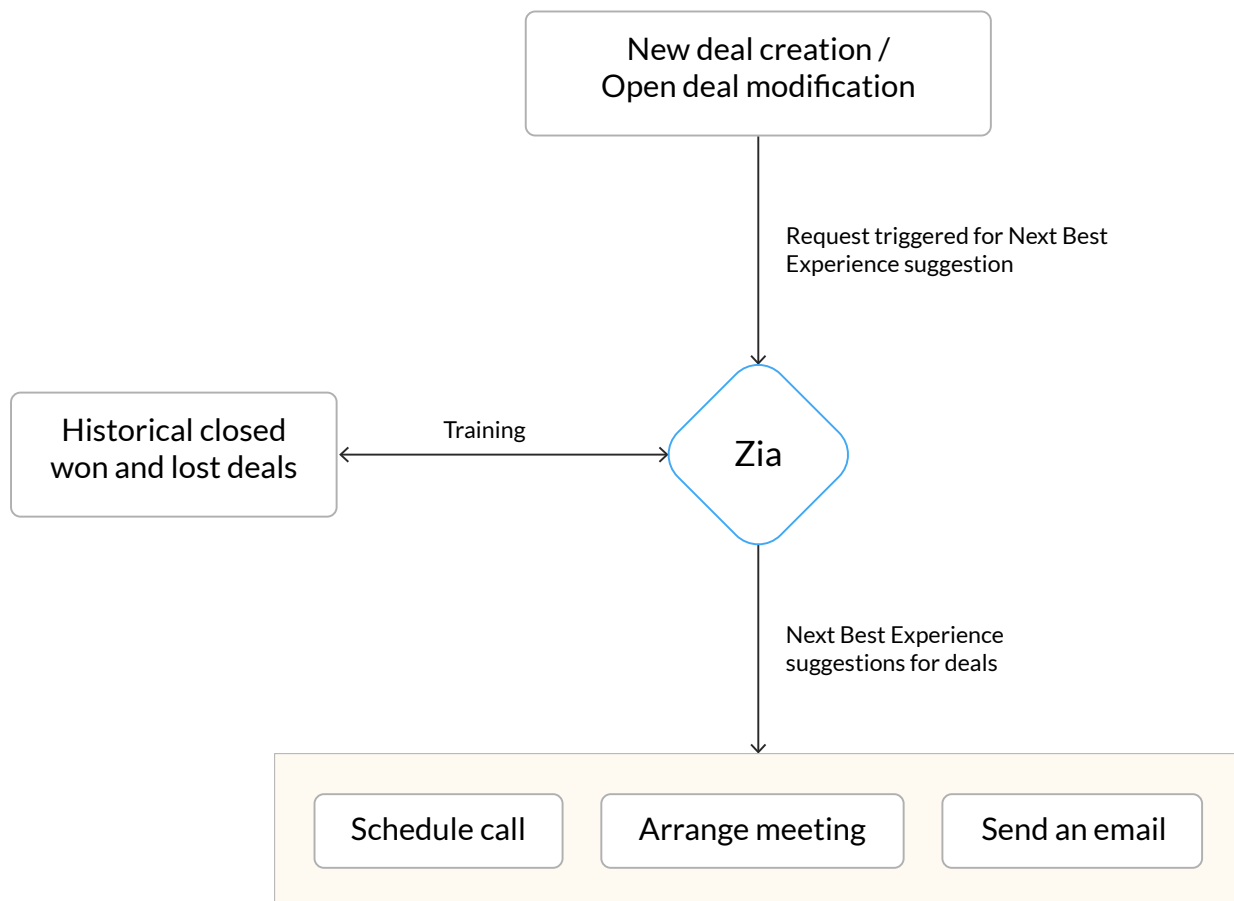
Next best experience in Zoho CRM

When the feature is enabled, Zia will monitor all open and active deals in your organization, analyze the deal stage, suggest the next best experience that you can provide, and prompt you to take action.

Zia does this by studying closed deals and analyzing the time taken for similar deals to progress from one stage to another. With this information, Zia correlates patterns and behaviors, such as industry, deal type, repeat customers, and more, to suggest the next best experience.

How it works

The flow diagram below depicts the working of next best experience suggestions in Zoho CRM:



Example scenario

For example, needs analysis is an important stage in a sales pipeline. During this stage, the major challenge a sales rep might face is obtaining a clear and full understanding of the prospect's requirements.

When your prospects enter this stage, the feature might prompt you to schedule a meeting within the next two days to put your prospects at ease and assess their needs—all based on historical data in your CRM.

Zylker Single Lens Specs Deal
 Regular customer High value deal

Overview Timeline

START Jan 1, 2022 CLOSING Apr 3, 2022

Qualification Needs Analysis Value Proposition Decision Making Proposal/Price Quote Negotiation/Review Closed Won Closed Lost

Deal Owner name Sage Wieser
 Stage Needs Analysis
 Expected Revenue USD 750,000
 Closing Date Apr 3, 2022
 Territory North America - ET

Next best experience
 Arrange a meeting within 2 days
[Create Meeting](#)

Meeting Information

Understanding technical and functional requirements

Location USA

All day

From Jan 20, 2022 9:00 AM

To Jan 20, 2022 11:00 AM

Host Sage Wieser

Participants Amelia Burrows

Meeting Color Picker -None-

[Add more details](#) Cancel Save

Bottom line

- ✓ Resolve personalized customer journey challenges.
- ✓ Avoid losing deals.
- ✓ Monitor open and active deal stages.

Resources

To learn more about how to configure next best experience feature in Zoho CRM, please review the documentation below:

- ✓ [Next best experience - help documentation](#)

Analytics

Strategy influencer

Why get insights on business goals?

Planning and implementing goals that best align with your organization is key to enhanced productivity and increased financial returns. To determine the most optimal plans for your organization, you need reliable insights. Setting goals without proper insights might lead to unrealistic or unsuitable targets. This, in turn, affects your business processes and provides you with an incorrect measure of your business. Zia provides you with these insights, saving you hours of data gathering and assessment and helping you avoid setting targets based on assumptions and instead set realistic goals.

Strategy influencer in Zoho CRM

The strategy influencer feature consists of AI-driven analytics that provide predictive, prescriptive, and diagnostic insights into your organization's business trends and patterns, using Zia's AI capabilities. It provides realistic targets and ways to achieve them. These insights help you understand the different factors affecting your business—positive and negative—so you can take the necessary corrective actions.

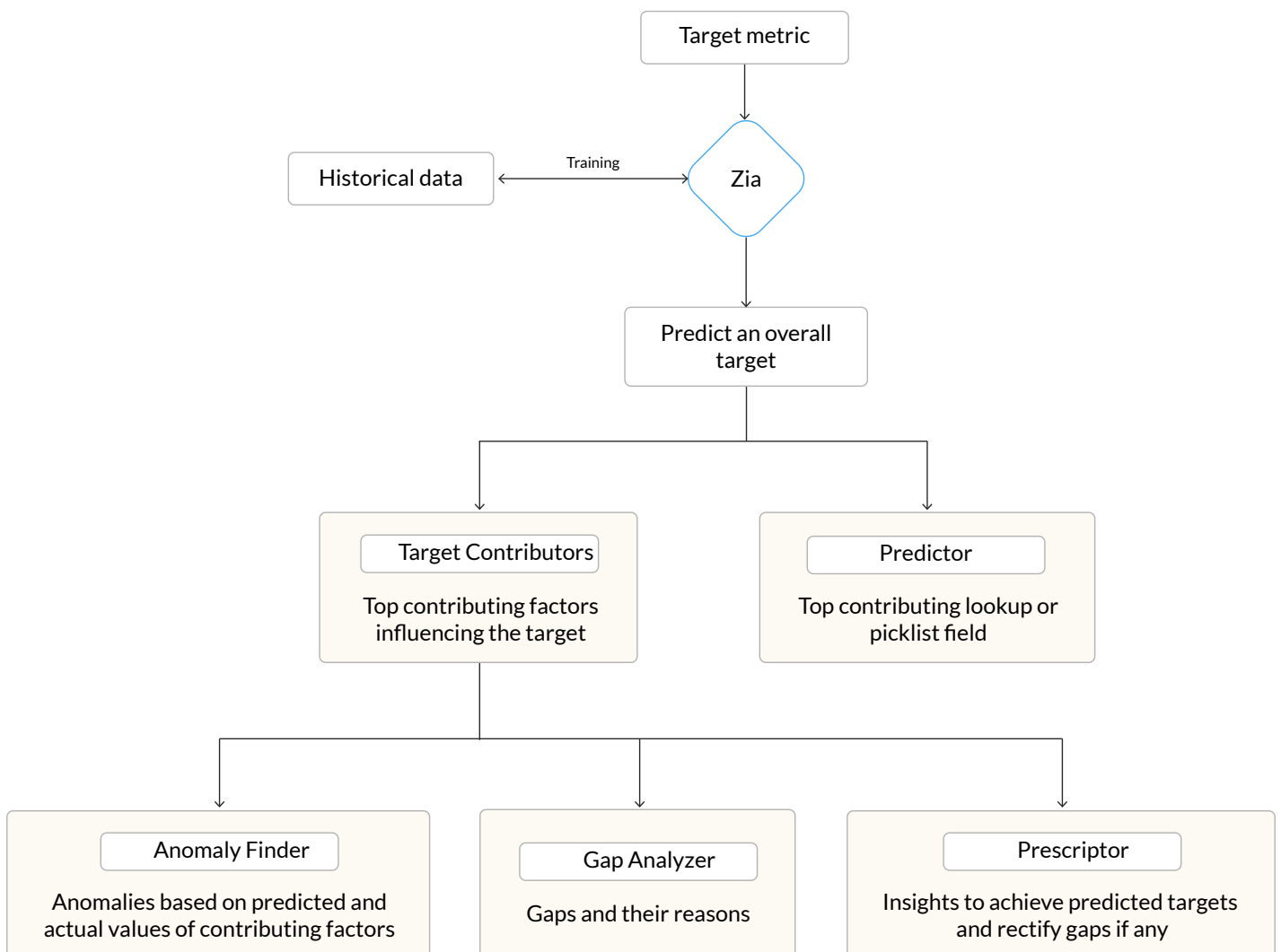
Strategy influencer predicts an overall target for user-defined target metrics. The insights are then provided in the form of the following components:

- **Target Contributors:** Lists the top contributing factors to achieve the overall target and specifies the target for each contributing factor, along with its actual achieved value.
- **Anomaly Finder:** Lists anomalies based on the actual achieved value for the predicted overall target. It can be positive (what benefited) if the overall target is achieved, or negative (what went wrong) if the overall target is not achieved.

- **Gap Analyzer:** Details major as well as minor gaps between predicted and actual values for a particular day or week, and the reasons for the gaps.
- **Predictor:** Identifies picklist and lookup fields that contribute the most towards your goals.
- **Prescriptor:** Suggests actions to achieve a predicted target and rectifications to achieve a missed target, both on a granular level. This includes daily, weekly, and monthly insights.

How it works

The flow diagram below depicts the working of strategy influencer in Zoho CRM:



Example scenario

Let's assume you run a home appliance business. You're planning targets to enhance your business output. For an effective implementation, you need relevant insights about your organization. Zia sets a realistic target and provides you with these insights through Strategy Influencer for your business.

Add Strategy Influencer ✕

1. Strategy Influencer Name

2. Select metric

3. Associated date field

4. Objective

Target Contributors

Last Week ▾

Target: Sum of Amount of Deals

\$ 10,000.00

Contributing Factors	Actual	Expected		
Count of Deals with Amount in the range \$ 1,884,351.75 - \$ 2,499,709.00 and Closing Date is this week	41	→ 48	▲ 17.07%	<div style="width: 83.33%;"></div>
Count of Deals with Probability in the range 9.999 - 40.0 and Closing Date is this week	52	→ 50	▼ 3.85	<div style="width: 104%;"></div>
Count of Deals with Campaign Source's Type as Partners and Closing Date is this week	38	→ 44	▲ 15.79%	<div style="width: 86.36%;"></div>
Count of Deals with Account Name's Account Type as Other and Closing Date is this week	65	→ 58	▼ 10.77%	<div style="width: 110.34%;"></div>
Sum of Expected Revenue of Deals with Expected Revenue in the range \$ 1,223,972.25 - \$ 2,499,665.00 and Closing Date is this week	\$ 66,631,008.10	→ \$ 81,065,819.83	▲ 21.66%	<div style="width: 82.2%;"></div>
Sum of Expected Revenue of Deals with Probability in the range 9.999 - 40.0 and Closing Date is this week	\$ 18,926,214.10	→ \$ 18,926,214.10	▼ 9.28%	<div style="width: 109.28%;"></div>
Sum of Probability of Deals with Probability in the range 9.999 - 40.0 and Closing Date is this week	1440	→ 1295.36	▼ 10.07%	<div style="width: 110.7%;"></div>

Anomaly Finder

Last Week ▾

What went wrong

Reasons	Expected	Achieved	Impacted Target
Count of Deals with Campaign Source's Type as Trade Show and Closing Date on Jun 4, 2022 decreased by 116.67%	13	6	-\$24,466.11
Count of Deals with Account Name's Account Type as Other and Closing Date is between Jun 4, 2022 and Jun 5, 2022 decreased by 100.00%	18	9	-\$27,027.60
Sum of Probability of Deals with Expected Revenue in the range \$ 83,972.25 - \$ 119,665.00 and Closing Date is between Jun 12, 2022 and Jun 14, 2022 decreased by 99.28%	1654	830	-\$35,299.83



Gap Analyser

Last Month ▾
⋮

Gap


\$ 60,300,000

Target Last Month

\$ 135,430,000

Reasons for Gap

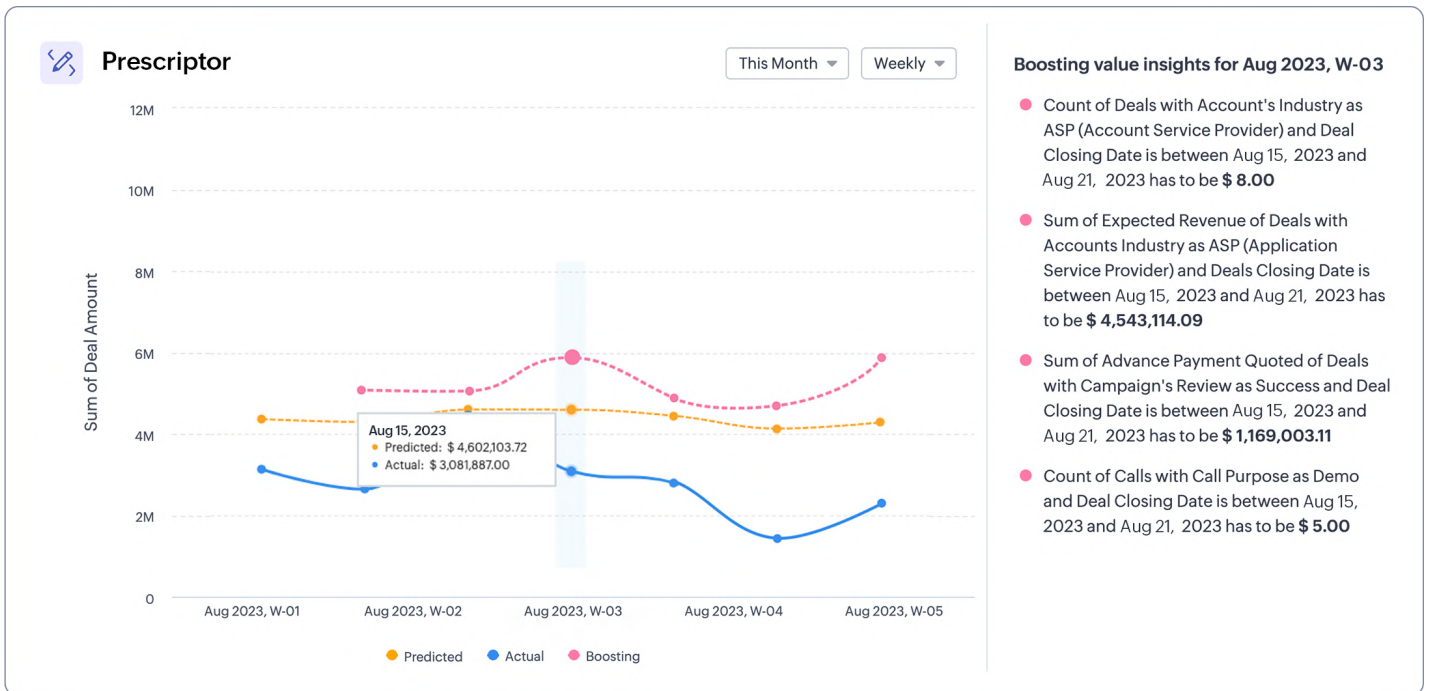
Factors	Gap Caused
<ul style="list-style-type: none"> ▼ Sum of Deal Amount of Deals with Deal Closing Date is between Feb 01, 2023 and Feb 06, 2023 ↗ Count of Calls with Call Purpose as Negotiation and Deals's Deal Closing Date is between Feb 01, 2023 and Feb 06, 2023 decreased by 175.00 % ↗ Count of Calls with Call Purpose as Demo and Deals's Deal Closing Date is between Feb 01, 2023 and Feb 06, 2023 decreased by 157.14 % ↗ Sum of Advance Payment Quoted of Deals with Campaign's Review as success and Deal Closing Date is between Feb 01, 2023 and Feb 06, 2023 decreased by 62.11 % ↗ Sum of Deal Amount of Deals with Account's Industry as Data/Telecom OEM and Deal Closing Date is between Feb 01, 2023 and Feb 06, 2023 decreased by 375.11 % ↗ Sum of Deal Amount of Deals with Account's Industry as ASP (Application Service Provider) and Deal Closing Date is between Feb 01, 2023 and Feb 06, 2023 decreased by 1639.92 % 	<p>\$ 14,915,000</p>



Predictor

This Week ▾

Customer Type	Achieved This Week	Predicted This Week	Predicted This Month	Predicted This Quarter
New	\$ 33,911.12	\$ 42,291.62 ▲ 10.78%	\$ 169,166.48	\$ 507,499.44
Existing	\$ 24,180.07	\$ 28,305.37 ▲ 11.37%	\$ 113,221.48	\$ 339,664.44
Total	\$ 58,091.19	\$ 70,596.99 ▲ 10.92%	\$ 282,387.96	\$ 847,163.88



You can utilize these insights to restructure your organizational strategies, improve sales, or implement retention activities accordingly.

Bottom line

- ✓ Tap into optimal target suggestions and ways to achieve them for your business goals.

Resources

To learn more about how to configure strategy influencer in Zoho CRM, please review the documentation below:

- ✓ [Strategy influencer - help documentation](#)

Enhanced suggestions for analytical components

Why get suggestions for analytical components?

Dashboards provide you with overviews of various aspects of your business operations to help you understand performance and incorporate necessary actions. Hence it is important that you select the right analytical components with relevant configuration, which can be a complex task. Zia can simplify this for you.

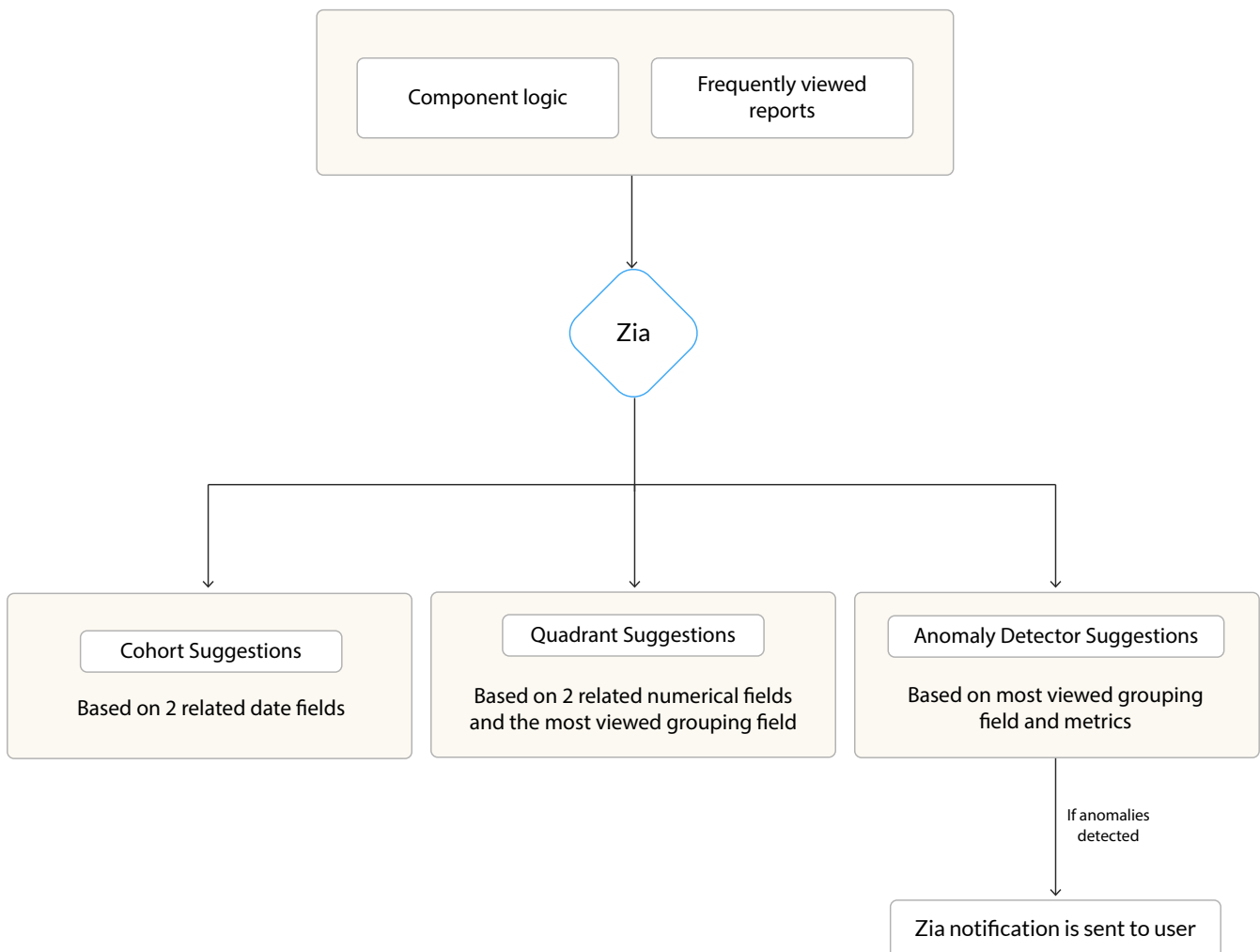
Enhanced suggestions for analytical components in Zoho CRM

Zia provides suggestions to create the most efficient analytical components that align with your organization's needs. Zia analyzes the purpose and logic for an analytical component coupled with the data usage patterns by the users. The suggestions are generated by analyzing frequently viewed reports by users. These suggestions are user-specific based on what a user focuses on and hence not the same for all users.

Based on these, Zia identifies the most helpful metrics in a module for their business and suggests the most appropriate component to them. Currently, Zia's suggestions will be available for **cohort**, **quadrant**, and **anomaly detector** components.

How it works

The flow diagram below depicts the working of enhanced suggestions for analytical components in Zoho CRM:



Example scenario 1

Imagine you operate an OTT content streaming service. You decide to track and analyze the number of new subscriptions you receive for each of your plans and decide on necessary strategies. One of the most frequent fields that you use is the OTT plan field. Zia studies these patterns and recommends a cohort with a relevant configuration.

← Standard Cohort
?

You can now pick a Cohort configuration from a list of components suggested by Zia

Try now
Later

1. Component Name

2. Object to be analyzed Select module Select grouping

3. Cohort Data Select module

+ Criteria filter

vs

Select measure

+ Criteria filter

4. Duration from Select date field to Select date field

5. Duration Interval Duration Interval

6. Duration Range 1 - 10

SALES COHORT FOR LEAD SOURCES

Lead Source	Record count	Cohort Duration (In years)		
		1	2	3
Facebook	100	12	18	20
Webinar	120	29	15	22
Trade Show	90	17	22	30
Cold Call	110	20	25	18
Referral	130	10	15	22

Cancel
Add & Reorder
Save

Analytics → Enhanced suggestions for analytical components

71

Cohort Suggestions ×

These suggestions are specific to each user. Pick any suggestion from the below list.

Sum of Annual Revenue with Created Time to Last Activity Time Cohort for Lead Source of Leads

Sum of Amount with Created Time to Closing Date Cohort for Lead Source of Deals

Sum of Amount with Created Time to Last Activity Time Cohort for Lead Source of Deals

Number of New Subscriptions with Plan Released Time to Plan Updated Time Cohort for OTT Plan of Deals

Select

Avg of Expected Revenue with Created Time to Last Activity Time Cohort for Stage of Deals

[Load More](#)

OTT PLANS MONTHLY PERFORMANCE

OTT Plan	Number of New Subscriptions	Plan Updated Time from Plan Released Time (In Months)		
		1	2	3
Basic	63	15	23	25
Regular	73	32	17	24
Elite	77	19	28	30
Complete	65	21	26	18

Example scenario 2

Let's say you run a resort and have multiple branches. You regularly update the number of bookings you receive and the revenue generated through your bookings. You'd now like to compare the number of bookings and revenue across all your branches. Zia suggests quadrants that can help you measure where each of your branches stands with respect to the intended metrics.

← Standard Quadrant
?

You can now pick a Quadrant configuration from a list of components suggested by Zia

Try now
Later

1. Component Name

2. Object to be analyzed Select module Select grouping

[+ Criteria filter](#)

3. Measure

X-axis Select measure

Y-axis Select measure

4. Benchmark Split equally

REVENUE GENERATED (VS) DEALS BY SALES PERS...

Name	Record Count (X)	Sum of Amount (Y)
Steve Wright	10	20,000
Michael Gold	15	60,000
Vaaric Jones	20	80,000
Fatimay Zeref	30	90,000
David Maxwell	40	80,000
Tai Chang	45	65,000
Jason Bell	50	50,000
Christopher	55	30,000
Kinza Saleem	60	15,000
Andrew Caddick	65	40,000
Ian Botham	75	55,000
Jerome Edwards	80	65,000
Henry John	85	90,000

Cancel
Add & Reorder
Save

Analytics → Enhanced suggestions for analytical components

73

Quadrant Suggestions



These suggestions are specific to each user. Pick any suggestion from the below list.

Sum of Days Visited VS Max of Average Time Spent (Minutes) by Lead Source (Contacts)

Avg of Annual Revenue VS Sum of Days Visited by Lead Source Contacts)

Number of Bookings VS Sum of Amount by Region (Deals)

Select

Sum of Days Visited VS Max of Average Time Spent (Minutes) by Contact Owner (Contacts)

Avg of Annual Revenue VS Sum of Days Visited by Contact Owner (Contacts)

[Load More](#)

Resort Revenue Across Regions



Example scenario 3

Imagine you own a pizza restaurant. You suddenly notice that there has been a significant dip in your restaurant's revenues for the past few days and realize you need to efficiently identify such anomalies regularly. To help you with this, Zia can suggest **anomaly components** to track your restaurant's revenue and notify you automatically so that you don't have to check for anomalies manually on a regular basis.

Add Anomaly Detector Suggestions | Preview Image ?

1. Component Name

2. Anomaly For

Select module ▼
Select measure ▼
Select date field ▼

[+ Criteria filter](#)


Compare with another metric ?

3. Anomaly Duration Select duration ▼ Select Frequency ▼

4. Objective Consider increase in value as positive ▼

Group By Select grouping ▼

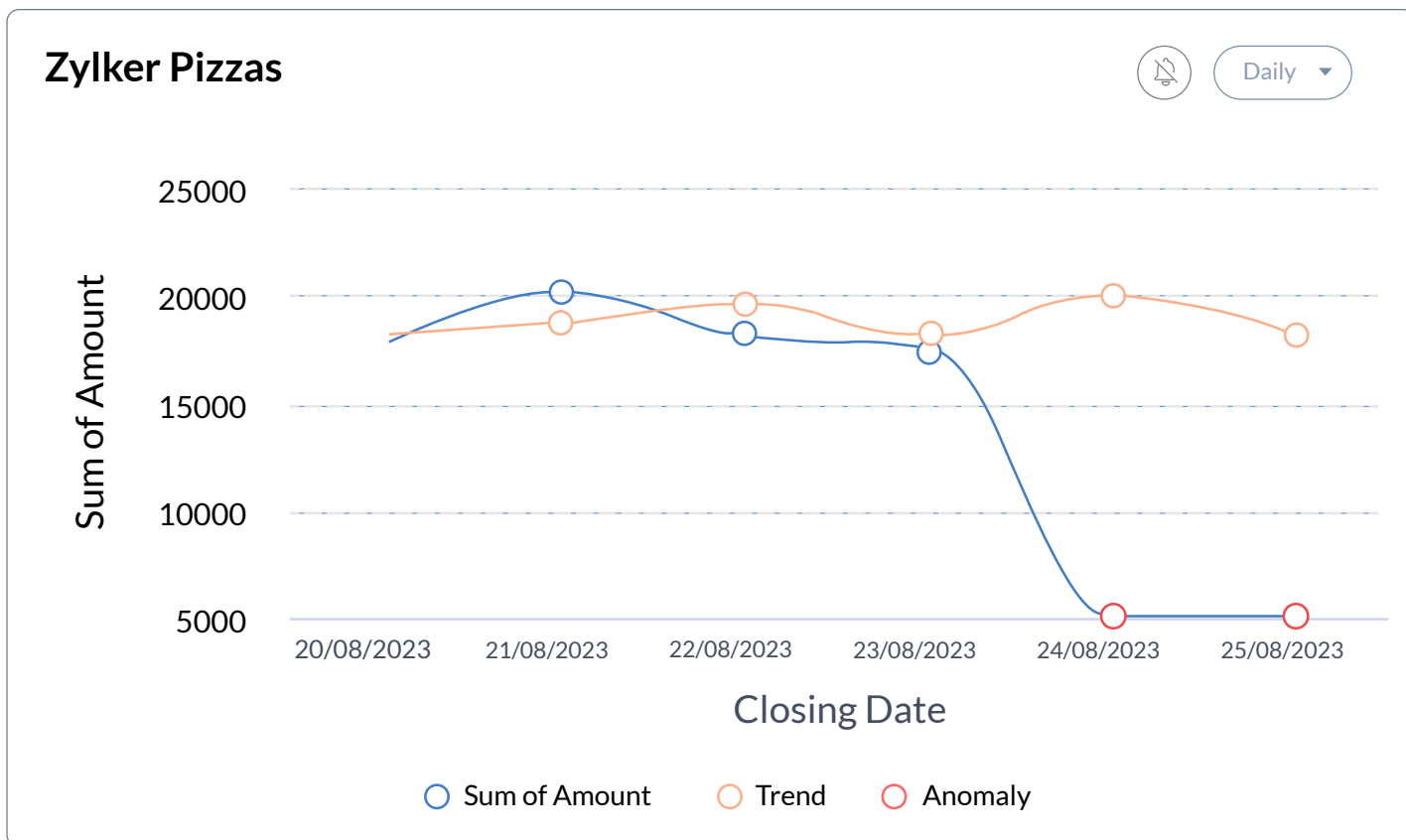
Cancel
Add & Reorder
Save

 **Anomaly Detector Suggestions**
×

These suggestions are specific to each user. Pick any suggestion from the below list.

Sum of Amount with Closing Date as Last 7 Days
Select

Sum of Annual Revenue by Lead Status with Created Time as Last 365 Days



Bottom line

- ✓ Harness suggestions and understand the most appropriate analytical components for your requirements.

Resources

To learn more about how to configure enhanced suggestions for analytical components in Zoho CRM, please review the documentation below:

- ✓ [Zia suggestions for cohort components- help documentation](#)
- ✓ [Zia suggestions for quadrant analysis components - help documentation](#)
- ✓ [Zia suggestions for anomaly components - help documentation](#)

Zia presentation

Why use Zia presentation?

Well-designed presentations with detailed and accurate business metrics can help you analyze your business in a comprehensive manner. But crafting such a presentation would require a lot of data, for which you'd need to perform exhaustive data analysis across your CRM. Zia Presentation does this job for you.

Zia presentation in Zoho CRM

Once you enable the feature, Zia prepares a slide deck that's pushed as a notification in the Zia Notifications panel each month.

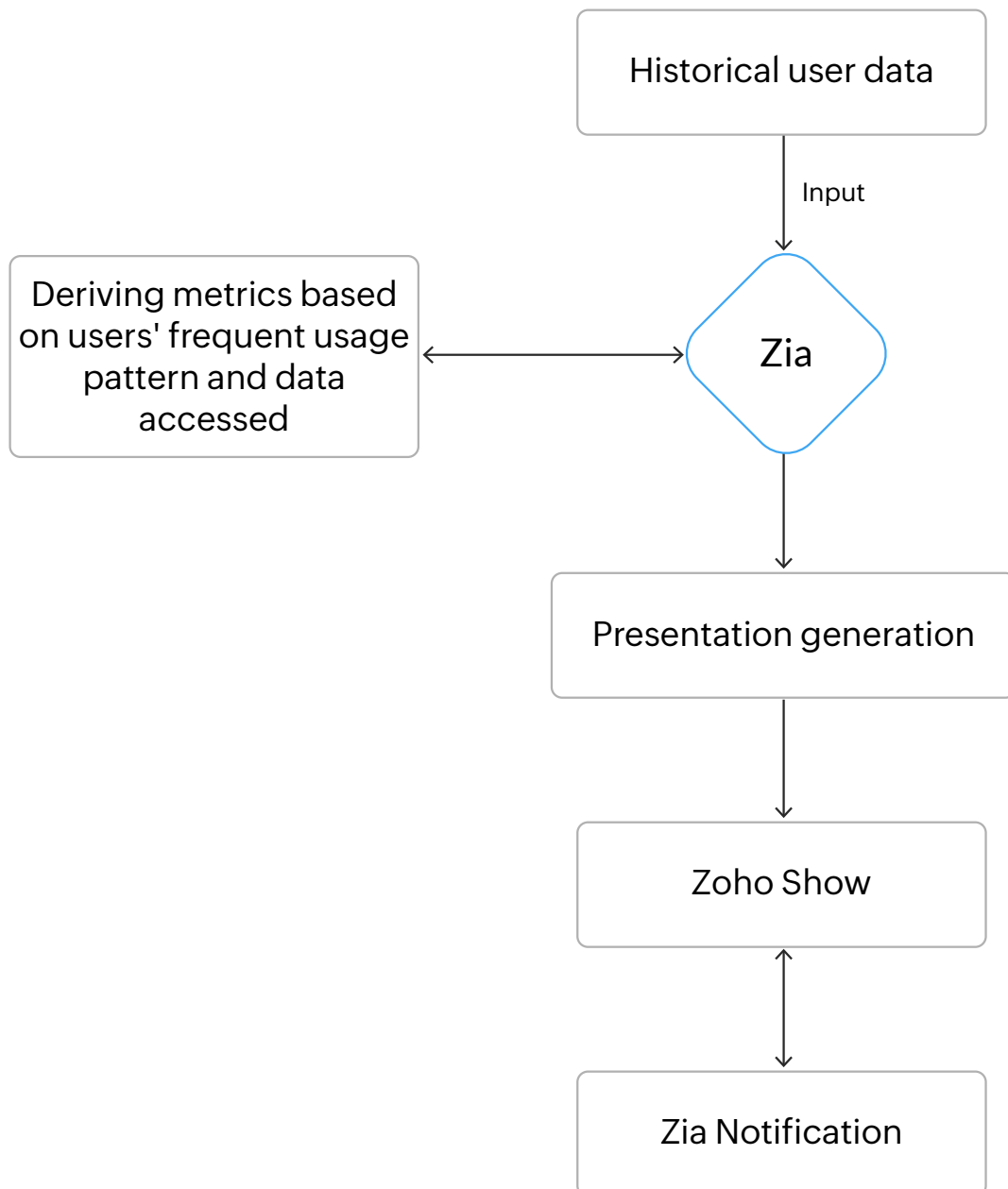
You can preview the presentation in the Zia notification panel upon clicking on the respective notification. You can also view it in Zoho Show. The deck contains module-level insights, performance-related KPIs, and behavioral analytics, providing you with a holistic view of your business performance.

Some of the analytics extracted include a trend analysis for a field over a period, an evaluation of the impact one field has had on another, a quadrant analysis to identify similar/dissimilar data points, and more. You can edit the generated presentation according to your needs in Zoho Show.

The analytics Zia creates derive from the importance of various modules and fields based on user input. Based on this data, Zia creates a relevant chart.

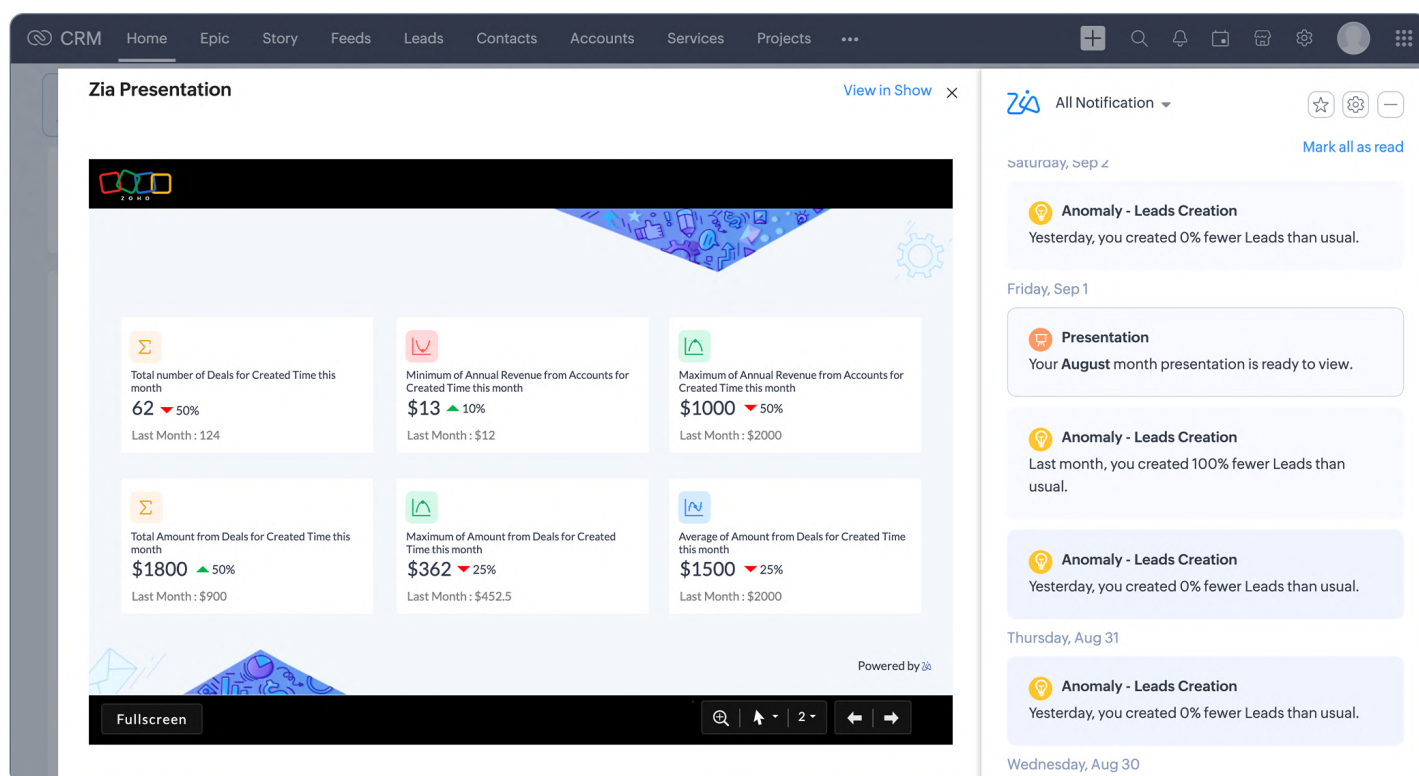
How it works

The flow diagram below depicts the working of Zia presentation in Zoho CRM :



Example scenario

Imagine you need to present the performance of your department to your superiors. You can create a presentation with all the necessary details. But you can make this easier by letting Zia do this for you. Zia generates presentations every month with important metrics based on your role in your organization.



The screenshot displays the Zia Presentation interface within the Zoho CRM application. The main dashboard features six key performance indicators (KPIs) comparing current month performance to the previous month:

Metric	Current Month	Change (%)	Last Month
Total number of Deals for Created Time this month	62	-50%	124
Minimum of Annual Revenue from Accounts for Created Time this month	\$13	+10%	\$12
Maximum of Annual Revenue from Accounts for Created Time this month	\$1000	-50%	\$2000
Total Amount from Deals for Created Time this month	\$1800	+50%	\$900
Maximum of Amount from Deals for Created Time this month	\$362	-25%	\$452.5
Average of Amount from Deals for Created Time this month	\$1500	-25%	\$2000

The interface also includes a navigation bar at the top with options like Home, Epic, Story, Feeds, Leads, Contacts, Accounts, Services, and Projects. A notification panel on the right side shows several alerts, including 'Anomaly - Leads Creation' and 'Presentation' notifications.

Bottom line

- ✓ Auto-generate presentations with in-depth organizational metrics.
- ✓ Analyze and make informed decisions relevant to your business.

Resources

To learn more about how to configure Zia presentation in Zoho CRM, please review the documentation below:

- ✓ [Zia presentation - help documentation](#)

Communication

Best time to contact customers

Why assess the best time to contact customers?

Contacting a customer at an inappropriate time might end up annoying the customer, damaging your relationship, and—worst case scenario—causing them to churn. Knowing that tiny mistakes like that can have such negative effects can be a difficult pill to swallow. Hence, it's important your sales reps know when to contact customers.

With many customers spread across different verticals, manually determining the best time to contact each customer is a time-consuming task. Zia does this job for you.

You also don't want to end up in a situation where you forgot to contact your leads or customers amid all your other tasks. Setting reminders can help you overcome this. But with Zia reminder, you need not manually set up reminders.

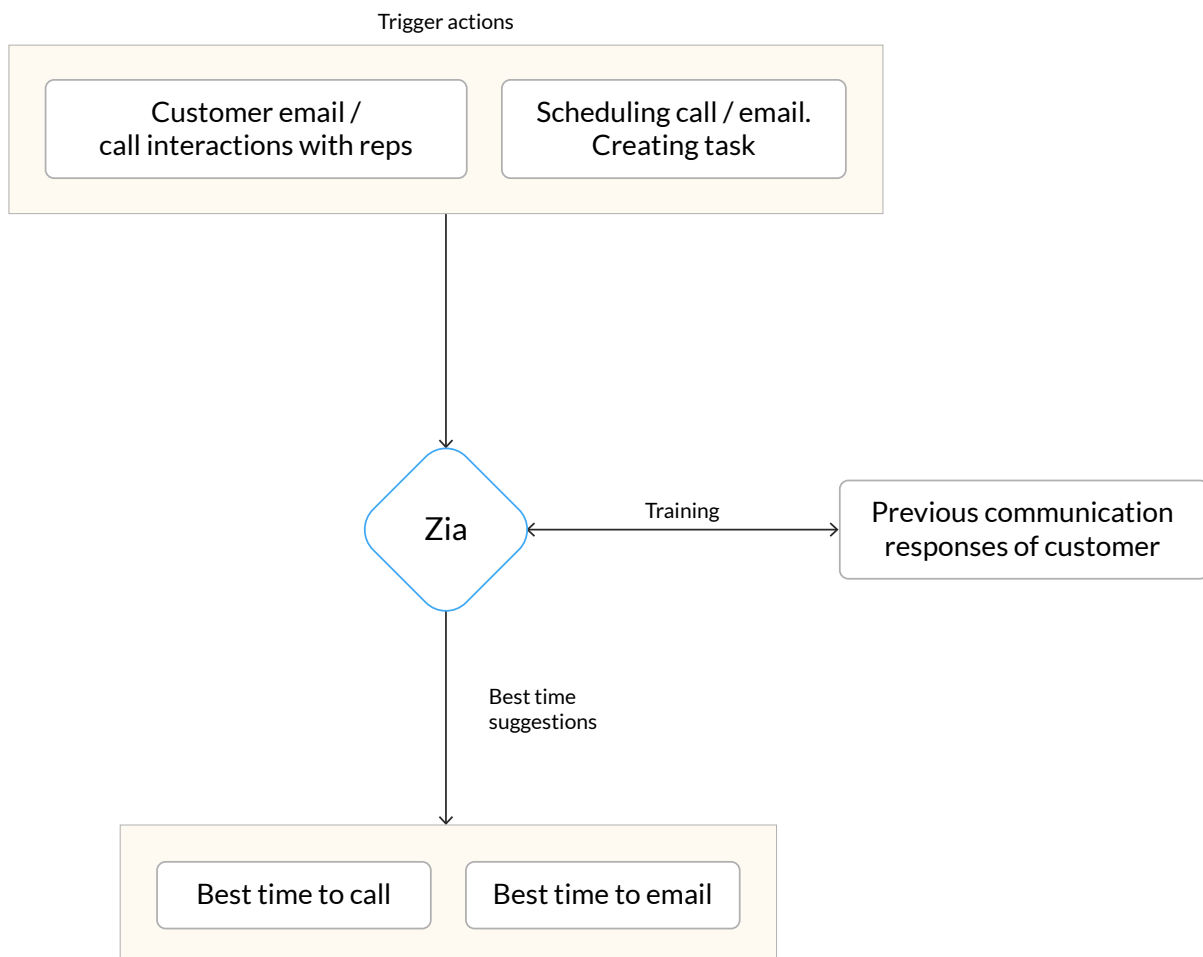
Best time to contact customers in Zoho CRM

Zia identifies the best time to contact a customer based on the customer's actions, such as when the customer answers your calls, replies to your emails, how long they take to respond to emails, and the time of day when they most often reply or take your calls. Based on this, Zia suggests the best time to send an email or call.

Zia sets up reminders for your records based on your best time to contact suggestions, thus eliminating the need for you to set these reminders manually. Zia also sends activity reminders based on their respective best time to contact suggestions.

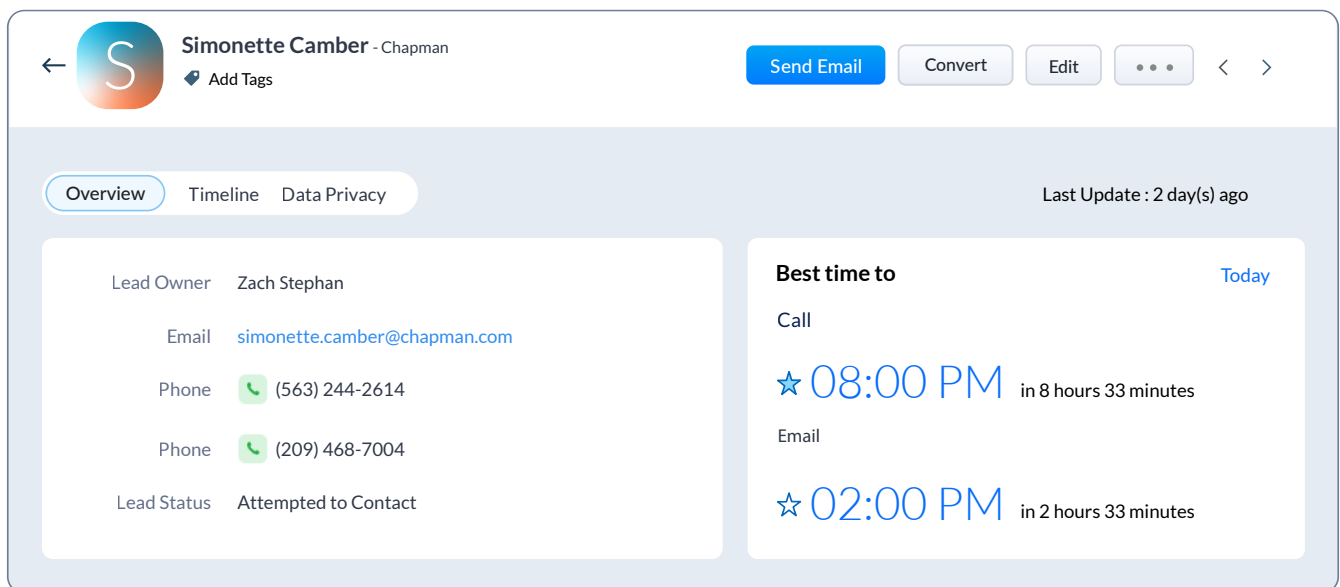
How it works

The flow diagram below depicts the working of best time to contact suggestions in Zoho CRM:



Example scenario 1

Let's assume you had an email conversation with a customer. Zia tracks factors like the time of the customer's replies to your emails and how long she took to respond to your emails, and then comes up with a suitable time to contact that customer.




Simonette Camber - Chapman
Add Tags


Send Email Convert Edit

Overview Timeline Data Privacy Last Update : 2 day(s) ago

Lead Owner Zach Stephan

Email simonette.camber@chapman.com

Phone  (563) 244-2614

Phone  (209) 468-7004

Lead Status Attempted to Contact

Best time to Today

Call

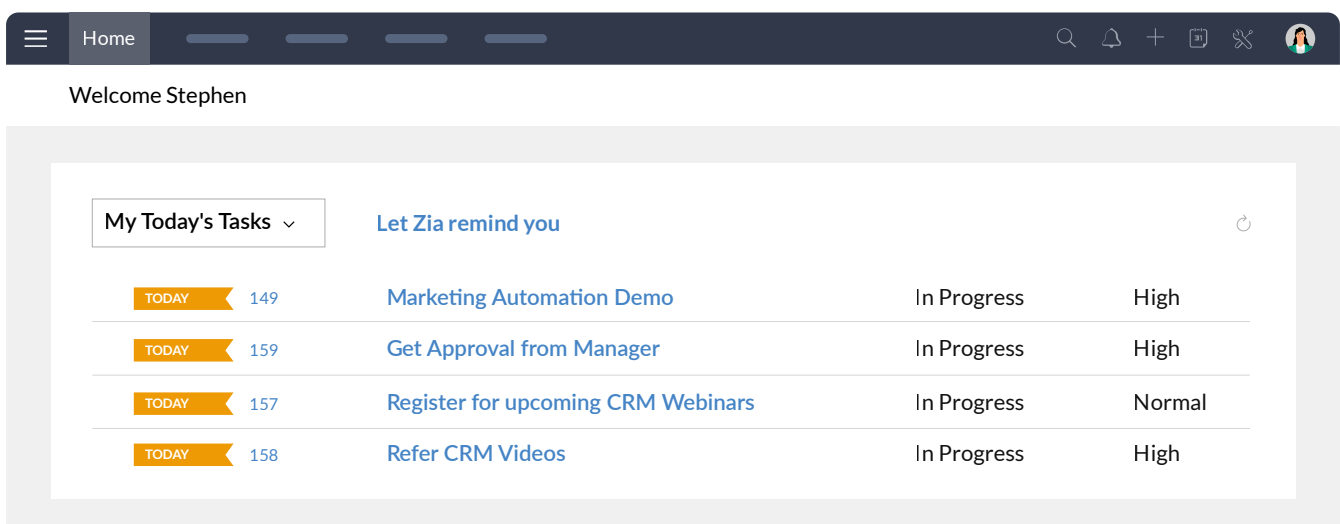
★ 08:00 PM in 8 hours 33 minutes

Email

★ 02:00 PM in 2 hours 33 minutes

Example scenario 2

Let's say you have around 4 tasks to be completed today. You don't have to set reminders for each task. Instead, you can just click on the Let Zia remind you option, and that's it—Zia will take care of the reminders for you.



Home

Welcome Stephen

My Today's Tasks ▾ Let Zia remind you

TODAY 149	Marketing Automation Demo	In Progress	High
TODAY 159	Get Approval from Manager	In Progress	High
TODAY 157	Register for upcoming CRM Webinars	In Progress	Normal
TODAY 158	Refer CRM Videos	In Progress	High

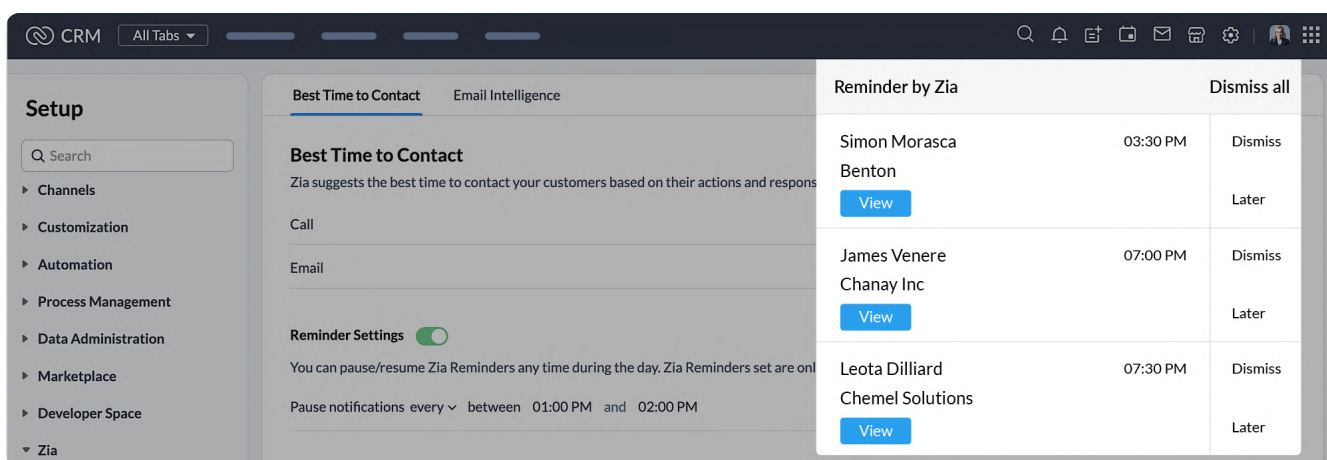
Set Reminder by Zia

Select which records you'd like Zia to remind you about. Zia calculates when a contact is most likely to respond and sets a reminder for that time.

- Zia reminders are only valid for one day. Every night at 12AM, the previous day's reminders are cleared from your notifications and a new set of Zia reminders are generated.
- Regardless of how many records you select, Zia will only display up to 300 reminders per day.
- Also include new records that get added to this view

Cancel

Set Reminder



The screenshot shows the Zoho CRM interface. On the left is a 'Setup' sidebar with categories like Channels, Customization, Automation, Process Management, Data Administration, Marketplace, Developer Space, and Zia. The main area is titled 'Best Time to Contact' under 'Email Intelligence'. It includes a 'Reminder Settings' toggle (turned on) and a note about pausing notifications between 01:00 PM and 02:00 PM. A 'Reminder by Zia' notification table is overlaid on the right, listing contacts with their suggested best times to contact and options to 'Dismiss' or 'View'.

Reminder by Zia		Dismiss all
Simon Morasca	03:30 PM	Dismiss
Benton		Later
James Venero	07:00 PM	Dismiss
Chanay Inc		Later
Leota Dilliard	07:30 PM	Dismiss
Chemel Solutions		Later

Bottom line

- ✓ Prevent inappropriately timed customer communications
- ✓ Improve chances of getting customer responses
- ✓ Set automatic activity reminders
- ✓ Avoid missing out on lead and customer communications

Resources

To learn more about how to configure the best time to contact suggestions and the related Zia reminders feature in Zoho CRM, please review the documentation below:

- ✓ [Best time to contact customers - help documentation](#)
- ✓ [Zia reminders - help documentation](#)

Best time to contact analytics

Why analyze best time to contact suggestions?

Zia provides you with suggestions regarding the best time to contact a customer based on previous customer interactions. But as with any suggestion, you need to analyze how accurate and effective the suggested times are, and what value they add to your organization. The best time to contact analytics feature helps you achieve this.

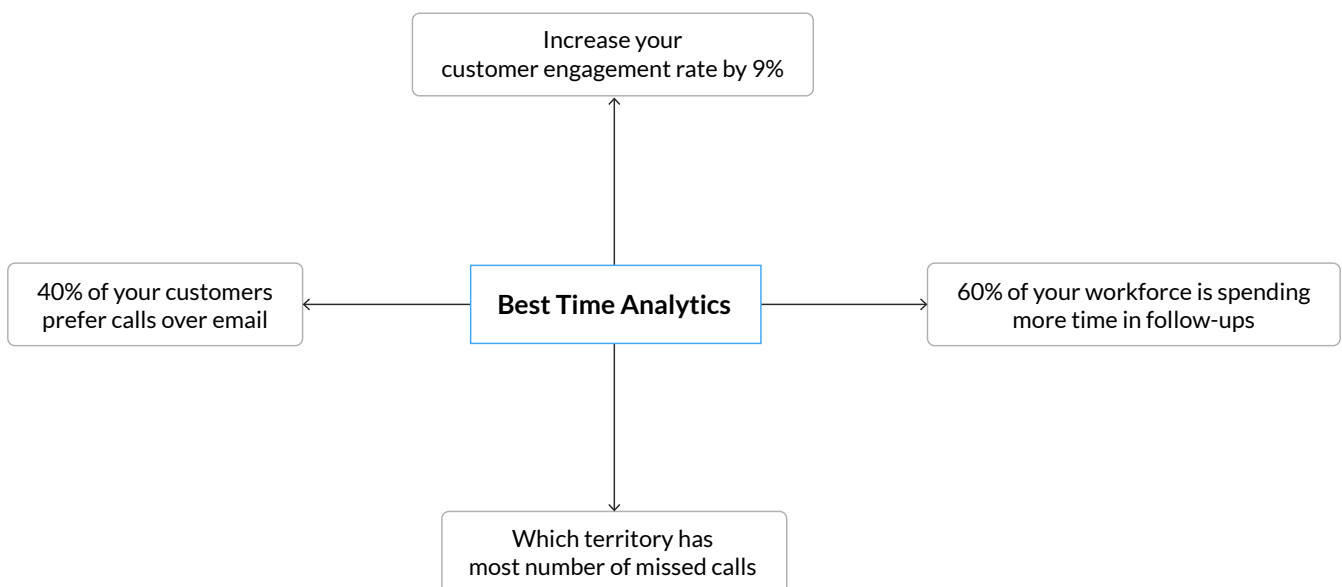
Best time to contact analytics in Zoho CRM

In Zoho CRM, Zia compares your interactions with best time to contact suggestions and provides various analytics, such as the summary of best time to contact suggestions, individual analyses of outgoing calls and emails, and how your reps use the best time to contact feature for emails and calls.

These analytics help you understand factors like why a lead failed to convert, how efficient sales reps are, and how effective your emails and calls are—all with respect to Zia's best time to contact suggestions.

How it works

The flow diagram below depicts some of the analytics that best time to contact analytics in Zoho CRM provides you with :











Example scenario

Let's say you've recently lost a few leads. As part of your analysis of why, you want to check when your sales reps contacted those leads. Instead of having to manually dig through each rep's records, you can rely on Zia, which reports how reps have used the best time to contact suggestions.

Best time followers

This section helps you to understand who and all used best time for their communication and their respective conversion rates.

Most Used ⓘ									
	Best time			Different time					
User name	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Total activities done	Best time usage count	Success of best time
 Amelia Burrows	762 (15%)	784 (89%)	53%	548 (35%)	1613(45%)	42%	3707	1546	↑ 11%
 Jacob Luluwayo	657 (30%)	1309 (67%)	54%	1451 (43%)	731(83%)	56%	4148	1966	↓ 2%
 Joane Lee	1280 (51%)	503 (30%)	45%	597 (53%)	998(12%)	27%	3378	1783	↑ 18%
 Tresa Sweely	1493 (62%)	1154 (42%)	53%	481 (14%)	989(6%)	9%	4117	2647	↓ 21%

Least Used ⓘ									
	Best time			Different time					
User name	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Outbound emails (Email open rate)	Outbound calls (Call answer rate)	Success rate	Total activities done	Best time usage count	Success of best time
 Martha Hills	1821 (48%)	873 (80%)	59%	472(92%)	1455(63%)	70%	4621	2694	↓ 11%
 Peter Gallante	1254 (57%)	430 (38%)	53%	1014 (97%)	681(85%)	92%	3379	1684	↓ 39%
 Leota Dilliard	1393 (68%)	567 (83%)	72%	671 (83%)	793(36%)	58%	3424	1960	↑ 14%
 Tai Chang	787 (45%)	118 (26%)	55%	1037 (93%)	805(54%)	47%	3826	1974	↑ 8%

Bottom line

- ✓ Evaluate performance of best time to contact suggestions and understand conversion failures.
- ✓ Analyze the performance of your emails and calls.
- ✓ Analyze reps' best time suggestion usage.

Resources

To learn more about how to configure best time to contact analytics in Zoho CRM, please review the documentation below:

- ✓ [Best time to contact analytics - help documentation](#)

Vision AI

Why validate images using vision AI ?

When selling products, it's essential that you maintain accurate images for those products—from the product's latest branding to the product's correct color. Customers prefer not to buy products with incorrect, unrelatable, or absent images. With bad product images, there's a chance of losing customers and having to invest a lot of time into correcting the images. The image validation feature, part of Zia's vision AI capabilities, helps you overcome this challenge.

Image validation in Zoho CRM

Zia's image validation feature validates images in one of two ways: classification or detection.

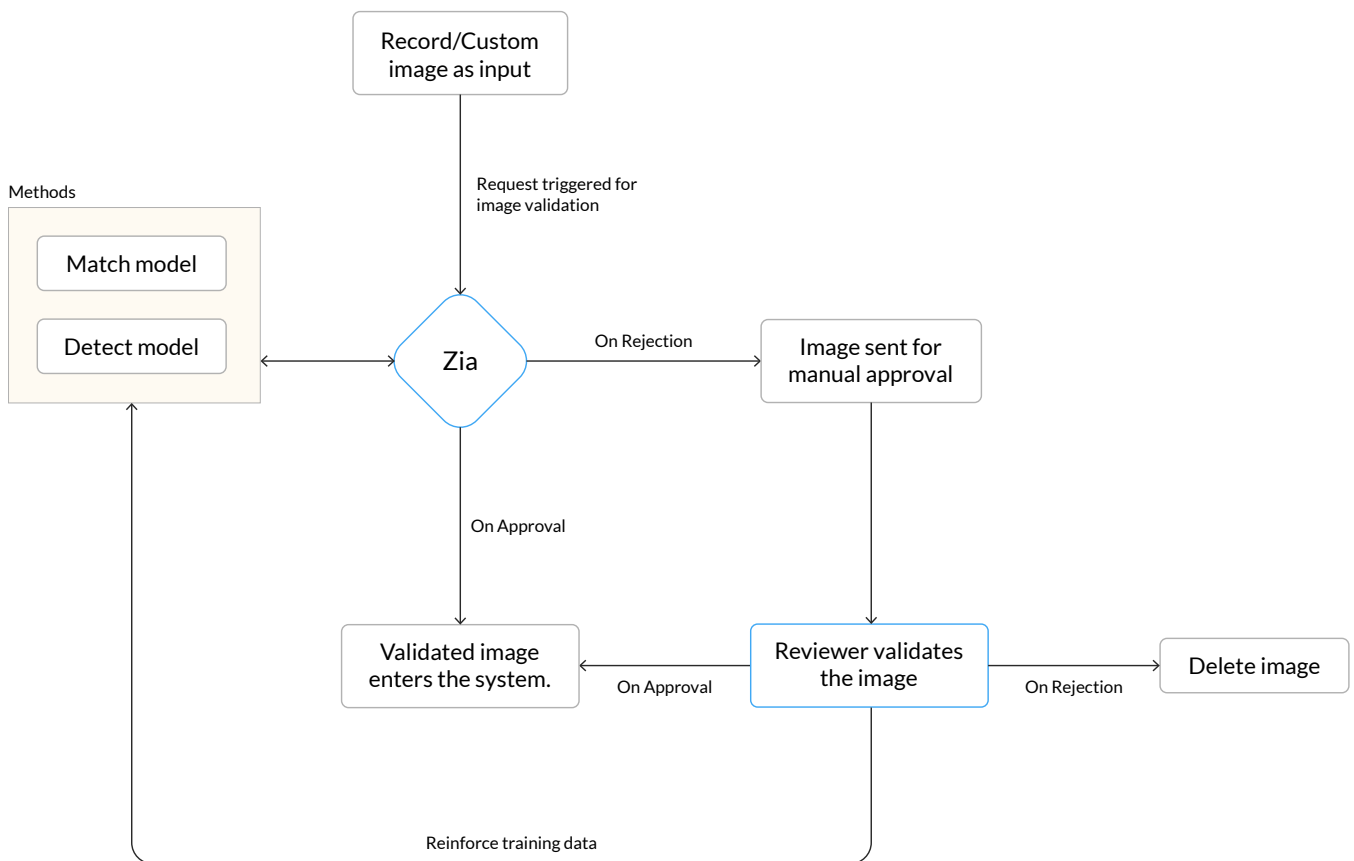
For image classification, Zia considers the entire image for validation and matches it to the pattern learned through training data. For example, Zia might prevent someone from accidentally uploading a picture of a washing machine instead of a refrigerator. You can define "desired" or "undesired" images for Zia's validation based on acceptable and unacceptable images, respectively.

For image detection, instead of assessing the entire image, Zia matches a part of an image to the pattern learned from the training. For example, a car must have a number plate. If a number plate isn't detected, it's considered invalid and sent for manual approval. You can train Zia to mark an image as valid or invalid based on whether an object is detected or not detected.

Zia also calculates success rate that gives you the percentage of successful validations which helps you analyze your training data.

How it works

The flow diagram below depicts the working of image validation in Zoho CRM:




Example scenario 1

Let's say you run a car service company. Since you provide services related specifically to cars, you only need to maintain images of your customers' cars. You classify these cars into various segments such as SUV, MUV, hatchback, and so on. For example, you now validate SUV and hatchback cars.


You can use the match validation type to train Zia to recognize SUV and hatchback cars. Zylker Companion X650 is a hatchback car that is entered as an input. It undergoes image validation and meets the rule criteria. Hence the image validation is successful. If the rule criteria are not met, let us say if the Zylker Companion X650 would have been a sedan car, the image validation fails as it doesn't meet the model's criteria.

Type of validation



Match the image


Match the entire input image to the pattern that Zia has created using the training data.



Detect objects


Detect objects in the input image by Zia has created using training data.

Upload Training Data ?



Desired

Upload permissible images according to your organization's preferences.




Undesired

Upload images that might be prohibited or unexpected in your organization.


1

OR

 SUV cars ×

[Add more images](#)

2

 Hatchback cars ×

[Add more images](#)

Car Service

Modified By : Martha Hills

Module	Job Cards
Layout	All Layouts
Field	Cars Image
Action on failure	Send image for approval


Training data

Match

Desired	SUV cars SUV Cars Hatchback cars Hatchback Cars , Hatchback Cars
---------	---

Rule pattern for validation success ([SUV cars is matched](#) or [Hatchback cars is matched](#))

Job Cards



Zylker Companion X650

Add Tags

Send Email
Convert
Edit
⋮

Related List

- Notes
- Attachments
- Emails
- Open Activities
- Closed Activities
- [Add related List](#)

Overview
Timeline
Last Update : a while ago

Company **Benton Travels**

Email keyleigh.lace@roflorence.com

Modified By **Martha Hills**
Tue, 15 Nov 2022 04:20 PM

Hide Details


Job Cards Information

Job Cards Name	Zylker Companion X650	Company	Benton Travels
Email	keyleigh.lace@roflorence.com	Modified By	Martha Hills <small>Tue, 15 Nov 2022 04:20 PM</small>
Created by	Amelia Burrows <small>Tue, 15 Nov 2022 04:17 PM</small>		

Example scenario 2


Let's say that you are a car reseller. You need to ensure that the cars you resell do not contain dents and paint scrapes. You upload images of the cars that you are reselling and create an approval process where only images with no dents and paint scrapes are approved. One of the cars has a dent that reflects in the uploaded image and hence the validation will fail and the image will be sent for manual approval.

Type of validation



Match the image

Match the entire input image to the pattern that Zia has created using the training data.




Detect objects

Detect objects in the input image by Zia has created using training data.

Upload Training Data ?

1 Object name


 Dents

Add more images

Object Is detected Is not detected

AND

2 Object name

 Scrapes

Add more images

Object Is detected Is not detected

Car Resale
Modified By : Martha Hills

Module	Cars
Layout	All Layouts
Field	Car Image
Action on failure	Send image for approval

Training data

Detect

Not to be detected	<ul style="list-style-type: none"> Car dents Dents Paint scrape Scrapes
--------------------	---


Rule pattern for validation success ([Car dents is not detected](#) or [Paint scrape is not detected](#))

Zylker Companion Y850 Cars ×

Image Approval 1

Image validation failure

The uploaded image has been sent for approval on image validation failure. The following image(s) does not align with organization norms.



Object detected	Car dents(2)
Field	Car Image
Rule Name	Car Resale
Awaiting Since	Today
Rule pattern	(Car dents is not detected and Paint scrape is not detected)

Accept
Remove

Bottom line

- ✓ Prevent mismatches between products and their respective images.

Resources

To learn more about how to configure image validation in Zoho CRM, please review the documentation below:

- ✓ [Image validation - help documentation](#)

Conversational AI

Why use conversational AI?

Through conversational AI, your computer applications can comprehend human modes of communication such as voice or chat and execute your instructions for you. For example, to fetch data, it might not be very efficient to search manually or even apply filters. Using the Ask Zia feature, a part of Zia's conversational AI capabilities, you can simply ask your queries to Zia, through voice or chat, and fetch the required data.

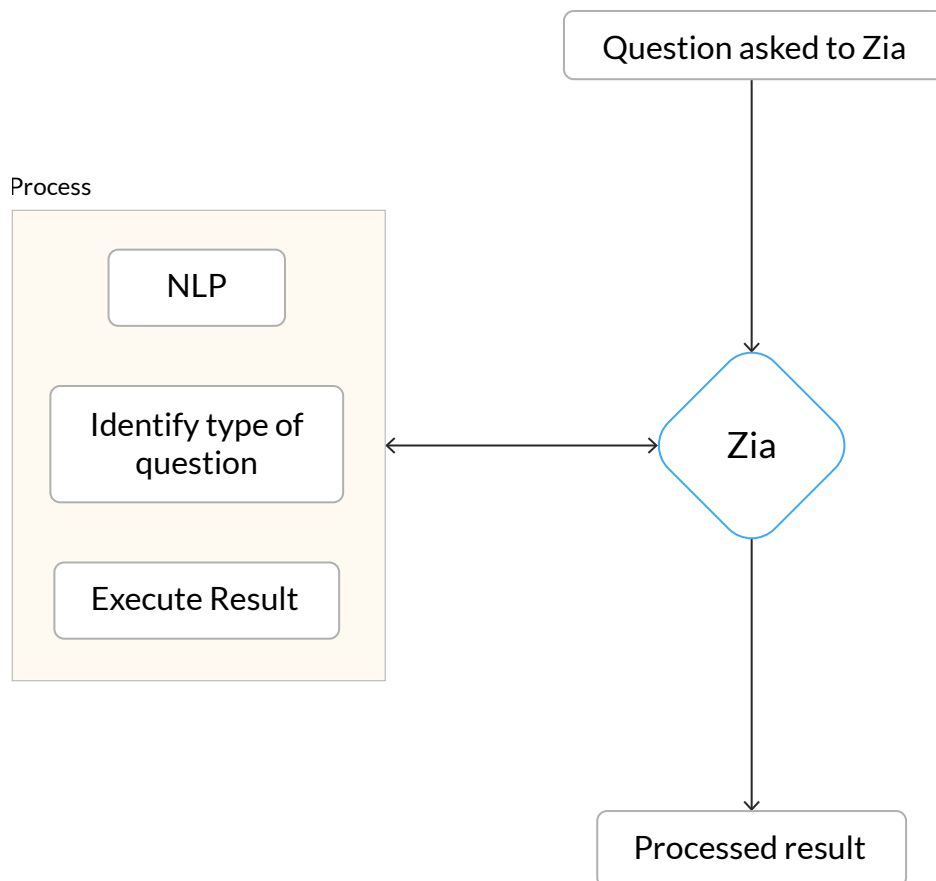
Ask Zia in Zoho CRM

Zia fetches your data from your CRM upon request. For example, if you say, "Hey Zia, get me the deals closing this month by stage." Zia will retrieve the information for you instantly. Based on what you ask, Zia can fetch data like lists of records, operational answers like sums or averages, dashboard components, globally matching search results, and FAQ answers. You can view the route that Zia used to arrive at the answers provided.

Zia also lets you pre-define skills and set a corresponding trigger action. For example, if you would like Zia to schedule a meeting at a specific time with a specific user, you can pre-configure it using Zia Skills. Now, when you ask Zia to schedule a meeting, the configured Zia Skills suggestion will be displayed, and you can proceed as needed.

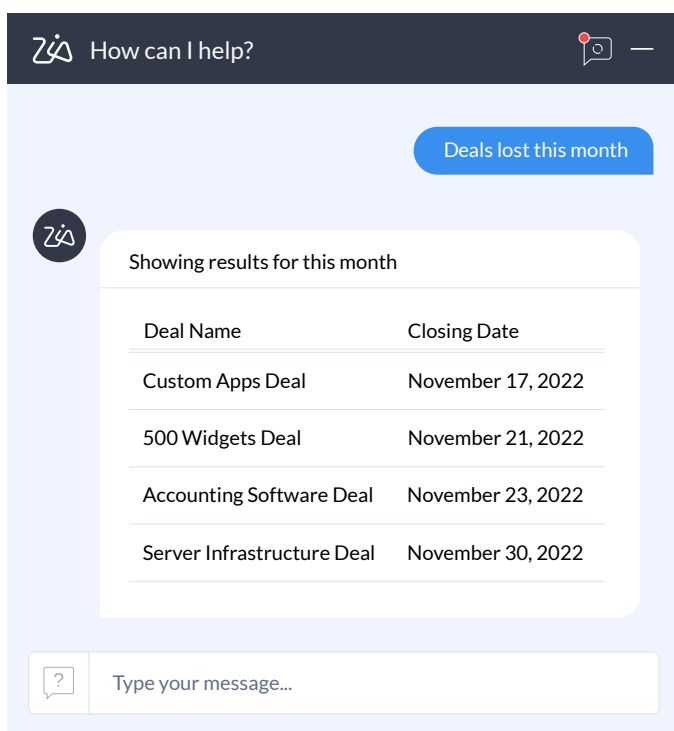
How it works

The flow diagram below depicts the working of Ask Zia in Zoho CRM:



Example scenario

Say you're in the middle of a meeting and quickly need to present your audience with the deals that were lost this month. You can ask Zia to fetch this data and the AI assistant will fetch it for you instantly.



Bottom line

- ✓ Fetch CRM data by asking Zia.
- ✓ Understand data-fetching process.

Resources

To learn more about how to configure Ask Zia in Zoho CRM, please review the documentation below:

- ✓ [Ask Zia - help documentation](#)

Email intelligence

Email sentiment analysis

Why analyze customer sentiment in emails?

You may receive a large number of emails everyday, but the ones that have a negative tone—sometimes even consecutively negative emails—usually require more immediate attention over others. But to identify the emails that need to be prioritized or require immediate attention, you need to analyze your email content fully. The email's subject line may not always indicate what the purpose of the email is. This amount of analysis is a time-consuming affair.

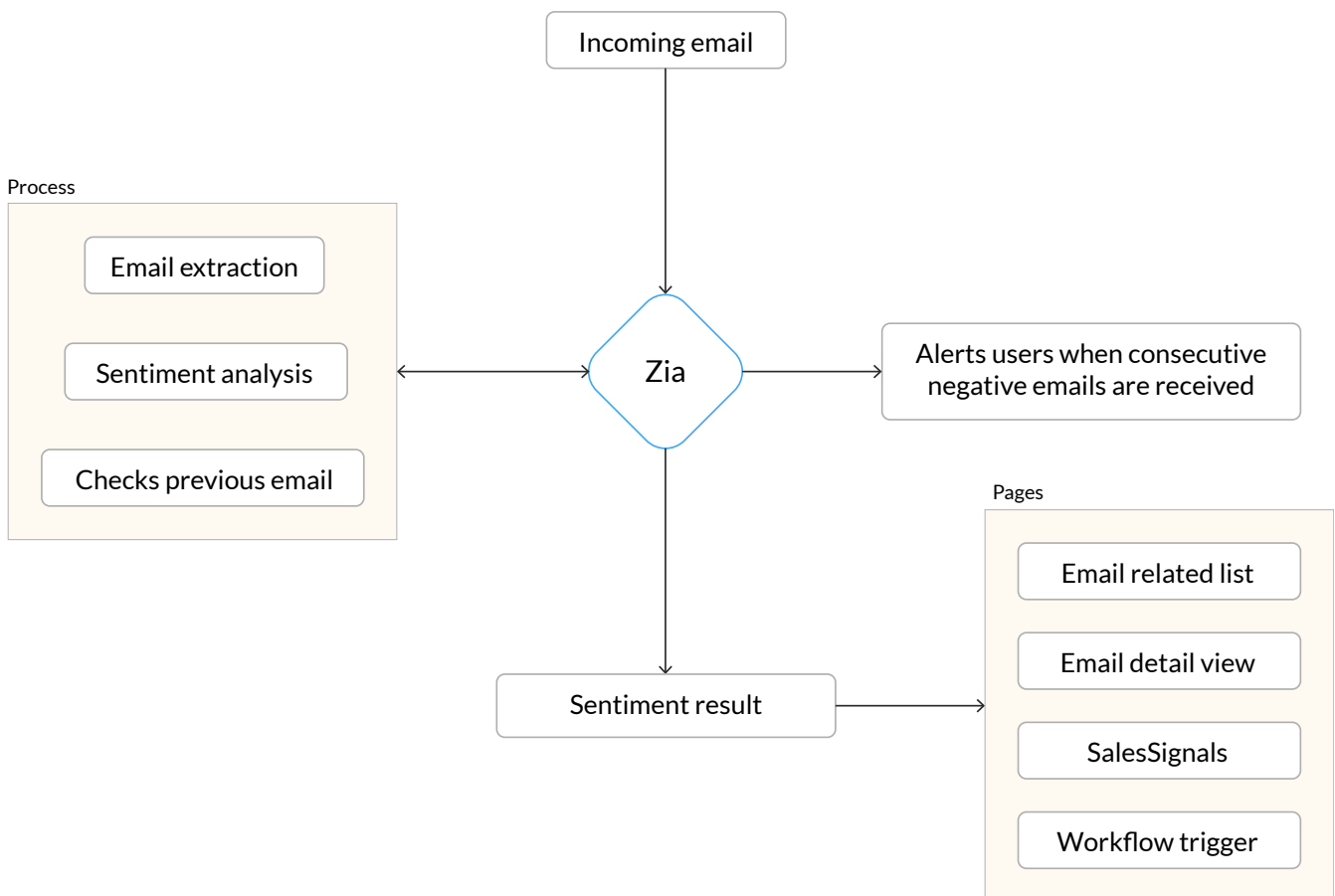
Email sentiment analysis in Zoho CRM

Zia's email sentiment analysis groups your emails into various sentiment categories: positive, negative, and neutral. Emails with a happy tone are grouped under positive, those with an unhappy tone are grouped under negative, and those with both of these traits are grouped under the neutral category.

You're also notified every time a customer sends consecutive negative emails, so you can keep an eye on these customers, take insights from your previous conversations with them, and act accordingly—which could help retain a customer who might otherwise be lost.

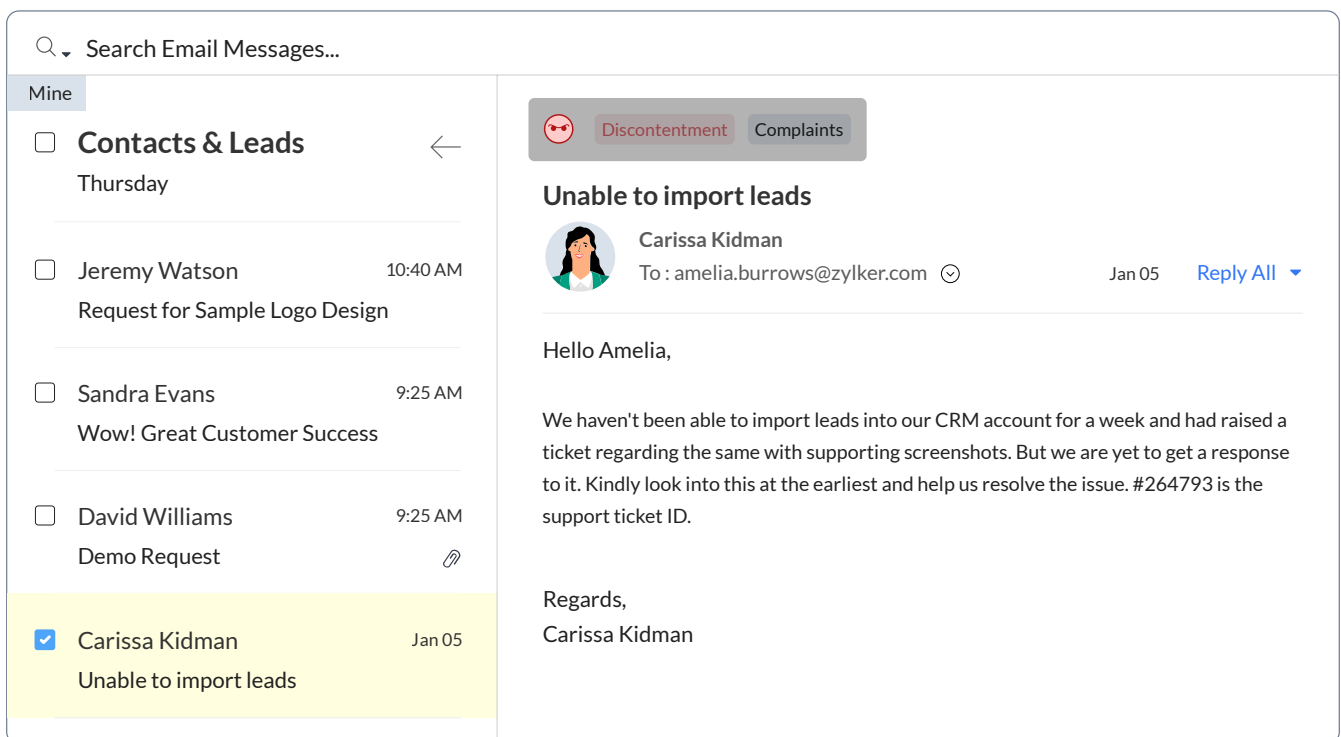
How it works

The flow diagram below depicts the working of email sentiment analysis and consecutive negative sentiments in Zoho CRM:




Example scenario 1


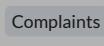
Let's say you've received an email from a customer saying that she had reached out for support regarding an issue in your product, but it's been a long time since she got a response from you. The sentiment of this email is negative since the customer is unhappy with your support. Hence, you should prioritize this customer and quickly attend to her queries.






Search Email Messages...

Mine

- Contacts & Leads** ←
Thursday
- Jeremy Watson 10:40 AM
Request for Sample Logo Design
- Sandra Evans 9:25 AM
Wow! Great Customer Success
- David Williams 9:25 AM
Demo Request 
- Carissa Kidman** Jan 05
Unable to import leads

 Discontentment 

Unable to import leads

 Carissa Kidman
To : amelia.burrows@zylker.com  Jan 05 [Reply All](#) 


Hello Amelia,

We haven't been able to import leads into our CRM account for a week and had raised a ticket regarding the same with supporting screenshots. But we are yet to get a response to it. Kindly look into this at the earliest and help us resolve the issue. #264793 is the support ticket ID.

Regards,
Carissa Kidman

Example scenario 2

Take the previous example where a customer was unsatisfied with the response time from your support. For various reasons, you haven't been able to respond to that customer. The customer then sends three more emails at regular intervals and is on the verge of churning. You now identify this trend and quickly reach out to the customer to resolve her problem.




Frustration
Complaints


◀
▶
✕

No response for more than a month

From : carissa.kidman@chapman.com

To : burrows.amelia@zylker.com 

Feb 13

[Reply All](#) 

Hello Amelia,

It has been more than a month since we had reached out for help regarding issues with importing leads into our CRM account. We reached out to you a couple of days back as well but didn't hear back. While we were genuinely interested in using your product, this has been a frustrating experience for us. We have therefore decided to switch to other alternatives.

Regards,
Carissa Kidman

Bottom line

- ✓ Understand customer sentiments in emails.
- ✓ Identify consecutive negative sentiments.
- ✓ Prioritize customer-related activities.

Resources

To learn more about how to configure email sentiment analysis in Zoho CRM, please review the documentation below:

- ✓ [Email sentiment analysis - help documentation](#)

Email intent

Why assess the intent of customer emails?

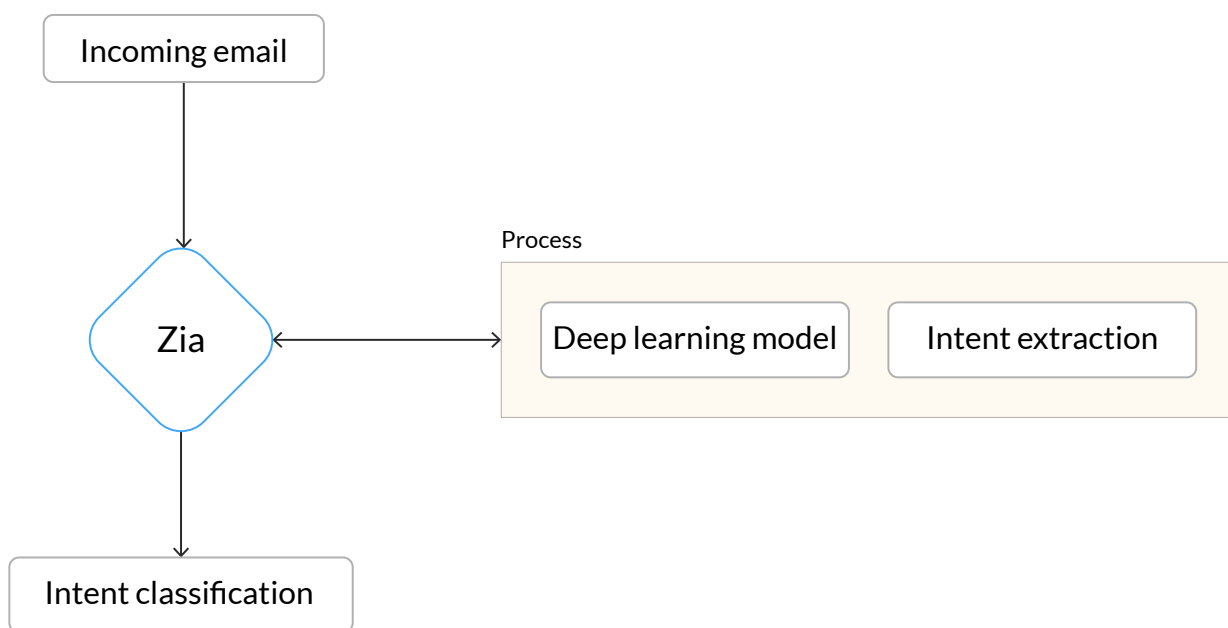
Your customers send you emails for various purposes—sometimes for a query or a complaint about your products and services. Zia helps you understand the intent of your customers through their emails.

Email intent in Zoho CRM

Based on the content of your customers' emails, Zia will identify the intent of each email as a query, request, complaint, or other.

How it works


The flow diagram below depicts the working of email intent assessment in Zoho CRM:



Example scenario

You receive an email from a customer who wants to upgrade his subscription plan because his company has grown significantly. In this case, he reaches out to you regarding purchasing a higher plan. Zia understands this and classifies the intent of this email as Purchase.

←



John Doe
Last Update : a while ago

Edit

⋮

😊

Happy

Purchase

⏪
⏩
✕

Request to upgrade CRM account to a higher plan

From : john.doe@codetwo.com
To : burrows.amelia@zylker.com 04:44 PM [Reply](#) ▾

Hello Amelia,

Owing to the expansion and robust growth that CodeTwo has witnessed over the past couple of years, we are in need of more features and capabilities to handle our company’s sales processes. We would like to connect with you to explore and understand in detail the most suitable subscription plan which we can upgrade to. Please revert to us so we can proceed further.

Regards
John Doe

Bottom line

- ✓ Understand intent and purpose of customer emails.

Resources

To learn more about how to configure the email intent feature in Zoho CRM, please review the documentation below:

- ✓ [Email intent - help documentation](#)

Custom email intent

Why set up custom intents for customer emails?

To provide your customers with solutions, you first need to understand the intent with which they've sent you emails. Zia's email intent feature infers your customers' intents via the content of their emails. But there might be instances where you need industry-specific intent categories because the default intent categories might not aptly characterize your business contexts. In these cases, Zia enables you to create your own intent categories.

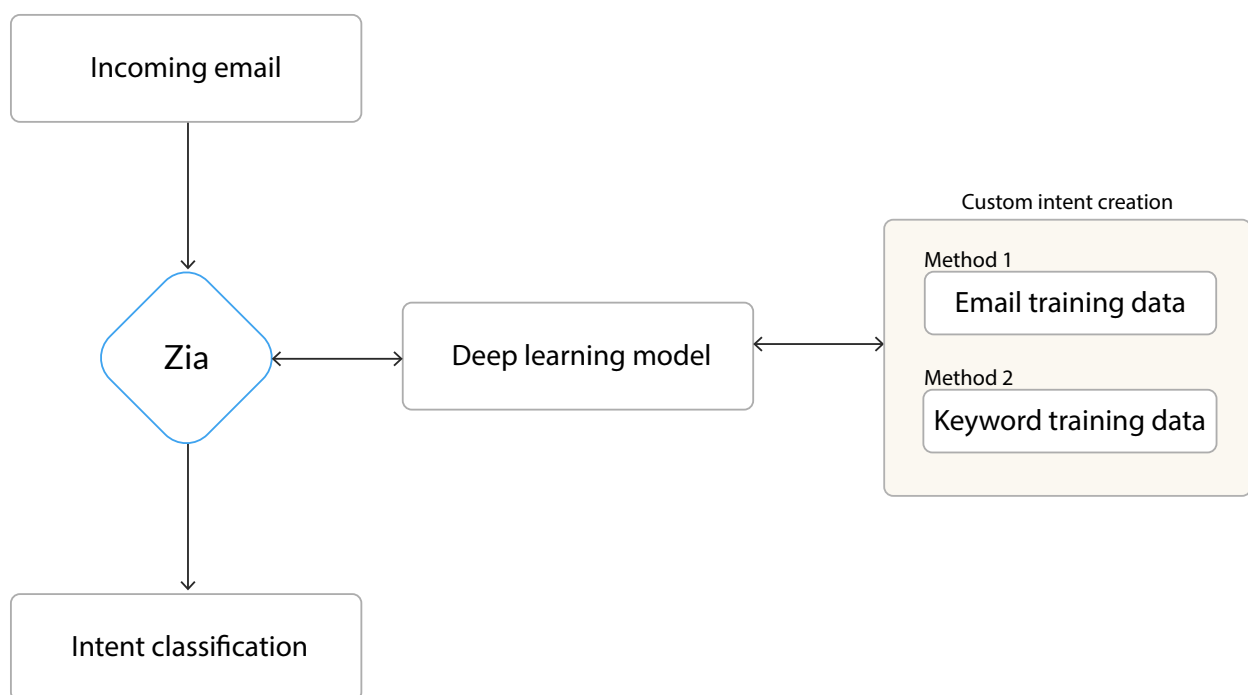
Custom email intent in Zoho CRM

Using custom email intent, you can train Zia and create your own custom intent suggestions to cater to your customers' exclusive business needs. This can be done in two ways: without sample data and with sample data.

Without sample data, you can create custom intent using up to five keywords that relate to the desired intent. With sample data, you can either paste email content as a sample or upload a file.

How it works

The flow diagram below depicts the working of custom email intent in Zoho CRM:



Example scenario 1

Let's assume you receive a lot of emails from customers asking for generative AI capabilities. Since you get a lot of requests for generative AI, you can create a custom intent named "Generative AI" and provide the relevant keywords for Zia to categorize. This helps you quickly identify emails that contain requests for generative AI capabilities.

Best Time to Contact Email Intelligence **Email Intent** Call Transcription Best Time Analytics


Create a new custom intent

Give your intent a name

Add a description

Creation method Without sample data With sample data

Add keywords that relate to the intent (Use meaningful words with comma separation without duplicate) 5/5

 Happy GenerativeAI < > ✕

Requesting access to new generative AI features

From : chau.kitzman@morlong.com Enrich data ⓘ

To : "Amelia Burrows" <amelia.burrows@zylker.com> Aug 27 Reply ▾

Hello Amelia,

We have been requesting generative AI features for our business needs for quite sometime now. We are happy that Zylker has worked on addressing these needs by launching its generative AI capabilities. We would like to get in touch regarding access to these features for our organization. Please get back to us on this.

Thanks & Regards
Chau Kitzman

Example scenario 2

Imagine you run a food delivery business. Recently, you've been receiving a lot of complaints from customers regarding delays in food deliveries. To handle this issue, you can create a custom intent called "Delivery Delays" to tackle this. You can collect content samples from emails related to delayed deliveries you've already received over time and either paste the email content or upload the sample email files to train Zia to recognize similar emails. This helps you instantly identify emails related to delivery delays and address them quickly.

Best Time to Contact
Email Intelligence
Email Intent
Call Transcription
Best Time Analytics

Create a new custom intent

Give your intent a name

Add a description

Creation method Without sample data With sample data

Upload sample data
A minimum of 25 emails is necessary for intent creation.

Enter email

File upload


Upload an individual email file(.eml, .html) or a bulk upload file(zip, .tgz) with the collection of .eml, .html files in it that reflect the intent you wish to create.

📎

Delivery Delays Email Samples.zip

0.674 MB

✕



Frustration
DeliveryDelays

<
>
×

Delay in delivery of food

From : carissa.kidman@gmail.com

To : "Delivery Support"<deliverysupport@zylker.com> ☺

Enrich data ⓘ

Sep 2 Reply ▼

Hi team,

I would like to bring to your notice that there have been multiple delays in food delivery from Zylker for the past couple of weeks. This has been a really frustrating experience. Kindly look into this issue and ensure timely delivery of food.

Thanks & Regards
Carissa Kidman

Bottom line

- ✓ Create custom intents specific to your business needs.
- ✓ Understand intents and purposes of customer emails better.

Resources

To learn more about how to configure custom email intent in Zoho CRM, please review the documentation below:

- ✓ [Custom email intent - help documentation](#)

Email emotion analysis

Why analyze customer emotions in emails?

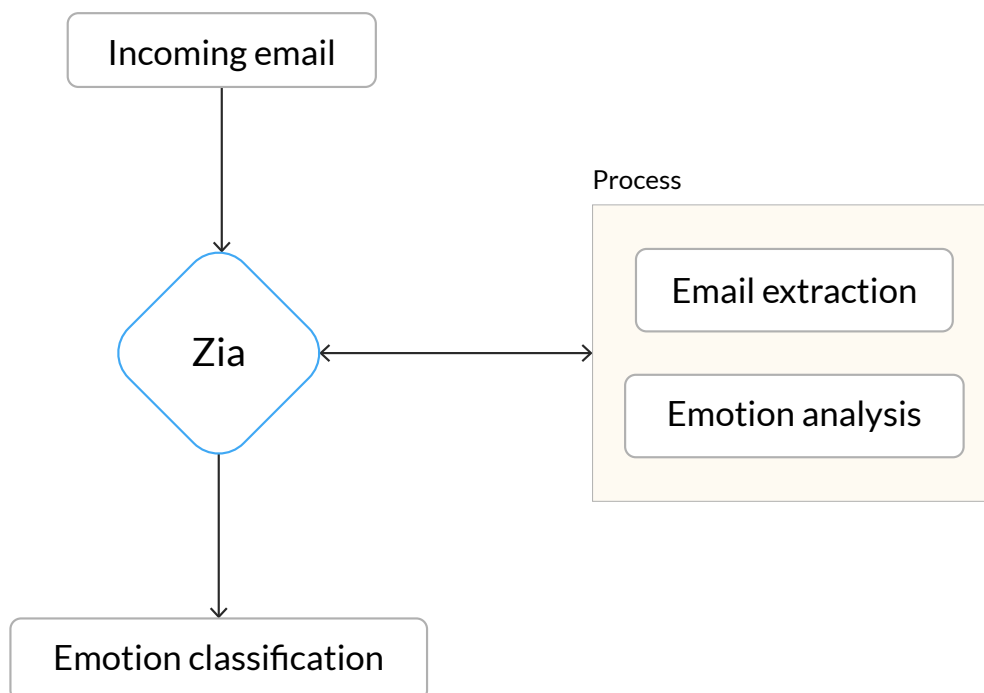
Customers convey various emotions through their emails. They may be happy about your support or frustrated with your product. It's important to understand their emotions to optimize your email prioritization. While the email sentiment feature provides you with the overall tone of your customers' emails, the emotion feature details for you the specific emotions present, both positive and negative, to help you understand the causes of these emotions and subsequent line of actions needed.

Email emotion analysis in Zoho CRM

Zia is trained to categorize emails based on the emotions expressed within them, such as happy, enthusiastic, grateful, confused, frustrated, discontented, trusting, and neutral. With these classifications, you can identify emails that need your immediate attention and prioritize them.

How it works


The flow diagram below depicts the working of email emotion analysis in Zoho CRM:



Example scenario

You get an email in which a customer expresses enthusiasm about the upcoming email automation upgrades to your product. Zia identifies this emotion and classifies it accordingly. In this case, the marketing team can consider this as high-priority and focus on extending this upgrade to the interested customer.

←



Tresa Sweely
Last Update : a while ago

Edit

⋮

😊

Enthusiasm

Others

◀
▶
✕

Interested in learning more about your upcoming email automation upgrades

From : tresa.sweely@dltiles.com
To : hills.martha@zylker.com 04:44 PM [Reply](#) ▾

Hello Martha,

We came across Zylker's recent blog post on email automation, in which there was also a mention on your upcoming email automation features. We have been discussing revamping our email automation for a while now and are excited about exploring these upcoming features. Please let us know how we can get in touch with you for further discussions.

Regards
Tresa Sweely

Bottom line

- ✓ Identify specific customer emotions based on email content.

Resources

To learn more about how to configure email emotion analysis in Zoho CRM, please review the documentation below:

- ✓ [Email emotion analysis - help documentation](#)

Activity extraction

Why extract activities from emails?

Emails contain not only responses and conversational messages, but also information about meetings, calls, and tasks to be performed. Zia can also capture these details so you can take the necessary actions.

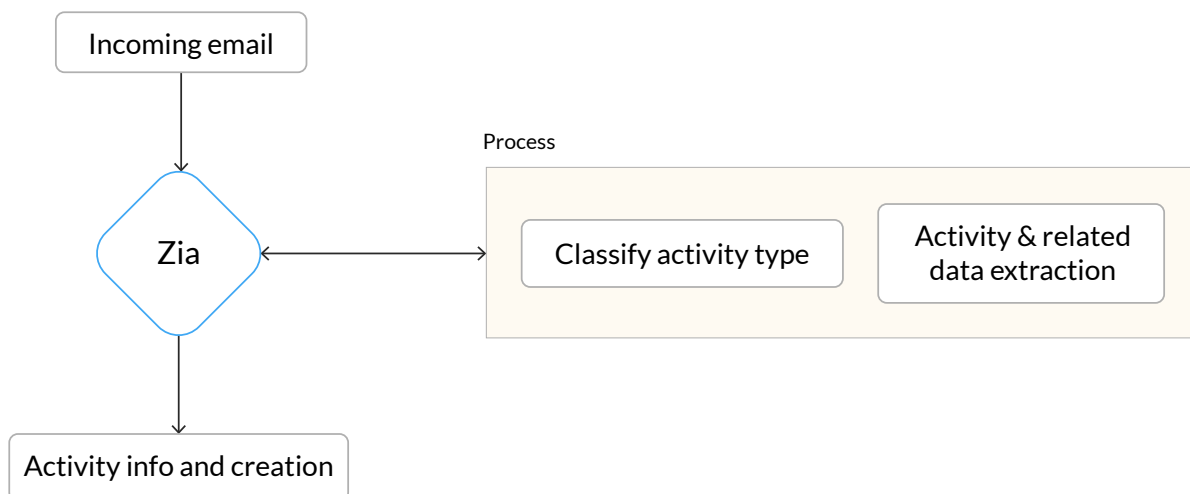
Activity extraction in Zoho CRM

Rather than going through your customer emails manually to look for information about meetings and tasks, Zia can identify these details from your customer emails and provide you with suggestions to add these activities to your CRM.

Zia can also identify activities as and when they arise instead of you having to open emails manually. You're notified of these activities via the Zia notification panel.

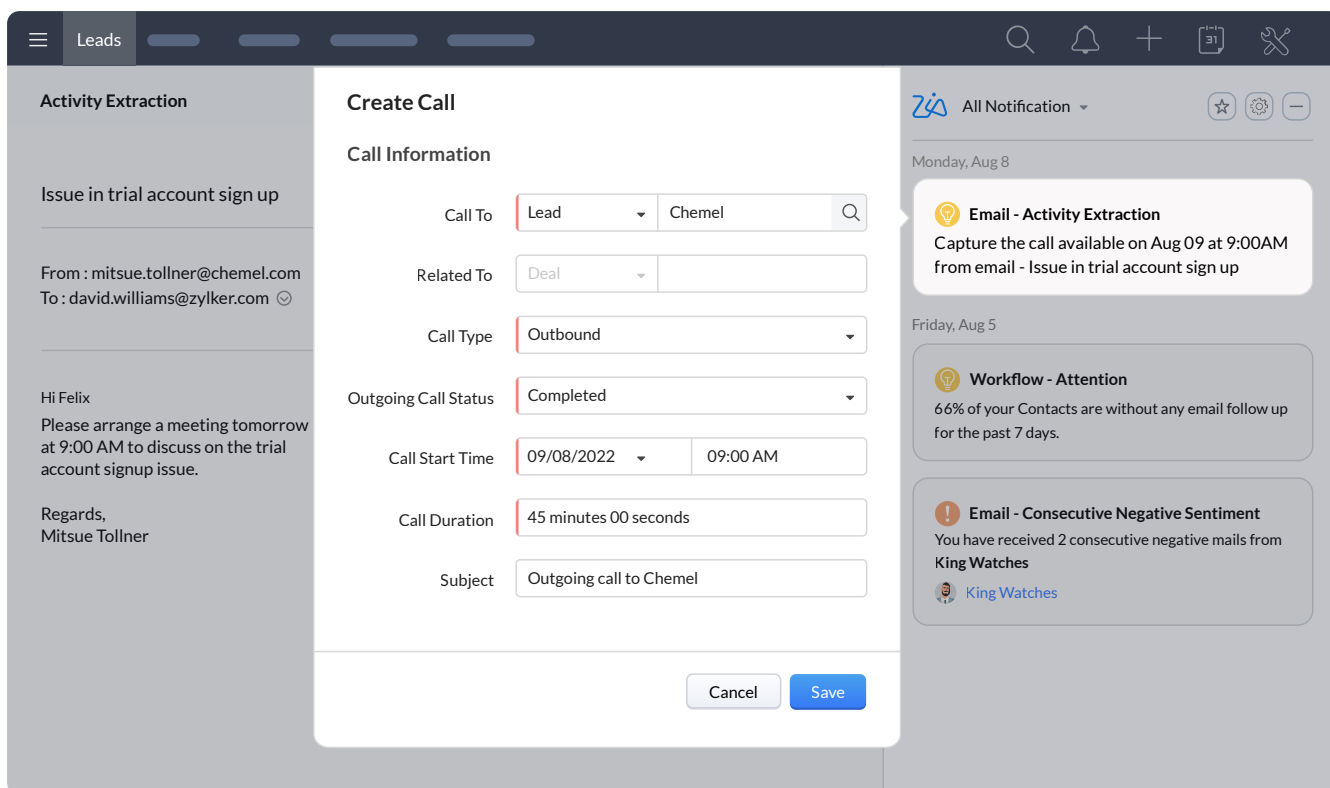
How it works

The flow diagram below depicts the working of activity extraction in Zoho CRM:



Example scenario

You've received an email from a customer who wants to have a call with you to discuss an issue he has faced with your product. You ask him for a suitable time for the call and he responds with one. Zia identifies this information and suggests you to add it as a call activity in your CRM.



The screenshot shows the Zoho CRM interface. On the left, an email is displayed with the subject 'Issue in trial account sign up' and content: 'Hi Felix, Please arrange a meeting tomorrow at 9:00 AM to discuss on the trial account signup issue. Regards, Mitsue Tollner'. The main area is a 'Create Call' form with the following fields:

- Call To:** Lead (dropdown), Chemel (text input)
- Related To:** Deal (dropdown)
- Call Type:** Outbound (dropdown)
- Outgoing Call Status:** Completed (dropdown)
- Call Start Time:** 09/08/2022 (date), 09:00 AM (time)
- Call Duration:** 45 minutes 00 seconds
- Subject:** Outgoing call to Chemel

At the bottom of the form are 'Cancel' and 'Save' buttons. On the right, a notification panel titled 'All Notification' shows three notifications:

- Monday, Aug 8:** Email - Activity Extraction: Capture the call available on Aug 09 at 9:00AM from email - Issue in trial account sign up
- Friday, Aug 5:** Workflow - Attention: 66% of your Contacts are without any email follow up for the past 7 days.
- Friday, Aug 5:** Email - Consecutive Negative Sentiment: You have received 2 consecutive negative mails from King Watches (with a link to King Watches)

Bottom line

- ✓ Add activities mentioned in customer emails into CRM.

Resources

To learn more about how to configure activity extraction in Zoho CRM, please review the documentation below:

- ✓ [Activity extraction - help documentation](#)

Email summary

Why refer to email summaries?

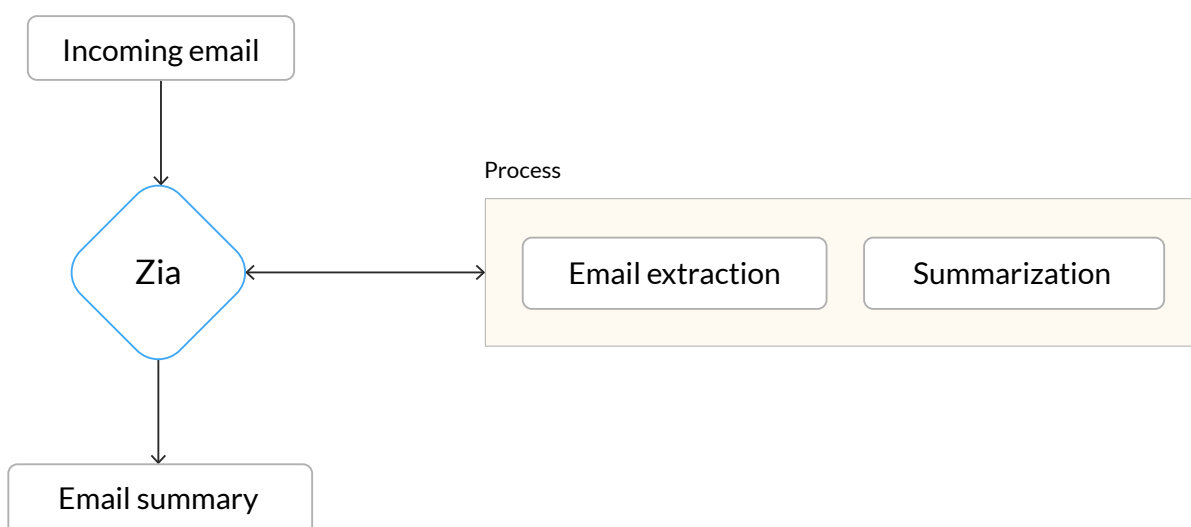
Emails contain lots of content, but the gist of an email might actually be just a couple of lines. Zia helps you identify the gist of your customer emails.

Email summary in Zoho CRM

The email summary feature automatically summarizes the content of your customer emails and gives you their gist in a single line. You can therefore get an idea of what a particular email is about without opening it. This is super helpful if you're handling a large number of emails.

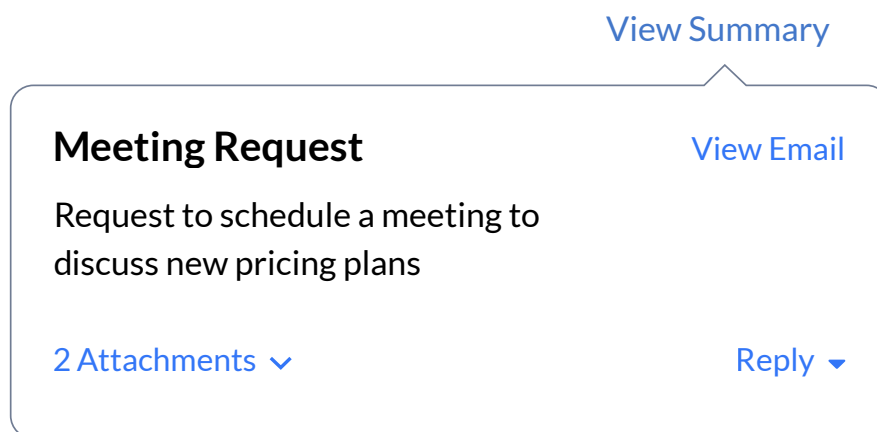
How it works

The flow diagram below depicts the working of the email summary feature in Zoho CRM:



Example scenario

You receive an email from a customer with a lot of questions about your new pricing plans. In this case, Zia will summarize the content of the email for you in a single line to help you understand that the email is about queries regarding your new pricing plans.



View Summary

Meeting Request [View Email](#)

Request to schedule a meeting to discuss new pricing plans

[2 Attachments](#) [Reply](#)

Bottom line

- ✓ Summarize customer emails.

Resources

To learn more about how to configure the email summary feature in Zoho CRM, please review the documentation below:

- ✓ [Email summary - help documentation](#)

Competitor alerts

Why use competitor alerts?

There might be instances when you receive emails from your leads or contacts that mention your competitors. These emails might contain their opinions of your competitors—information which could be crucial for you in order to cater to the needs of these leads or contacts promptly and acquire or retain them. Manually scouring through your emails to find mentions of your competitors is infeasible and tiresome, and there's a chance that you might miss something. Zia's competitor alerts are helpful in these situations.

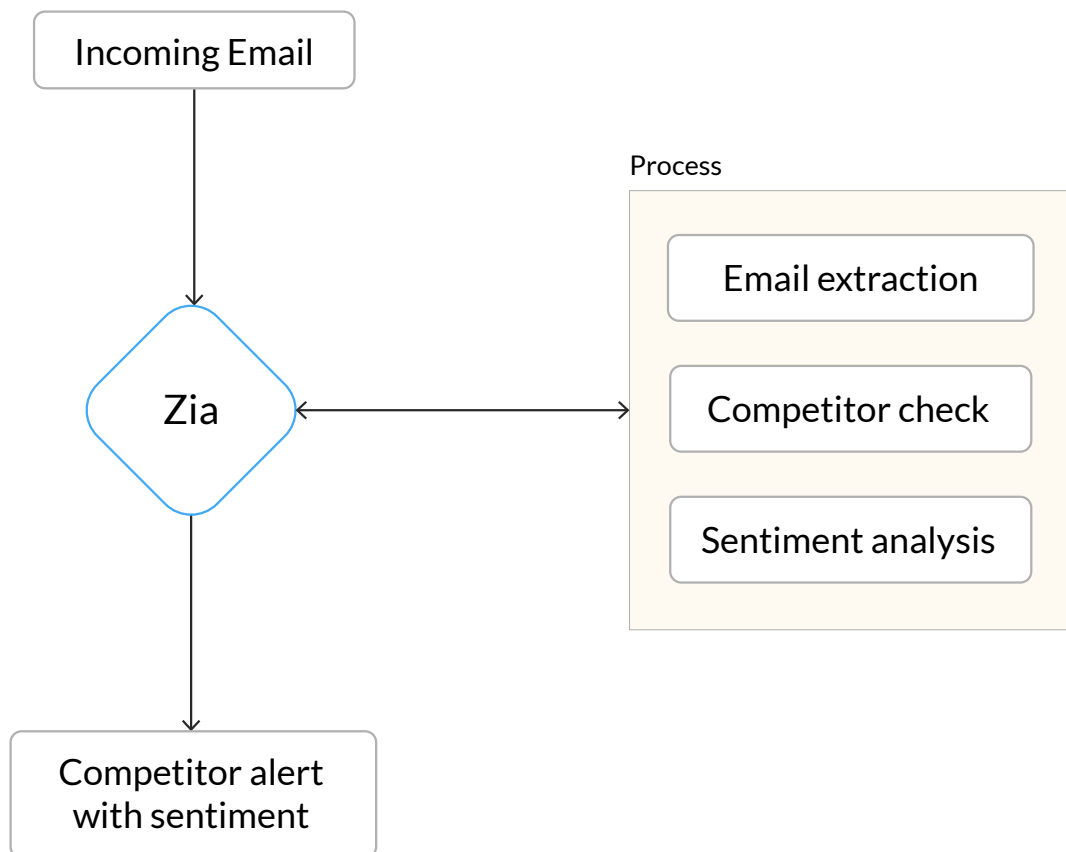
Competitor alerts in Zoho CRM

The competitor alerts feature notifies your sales reps when your leads or contacts mention your competitors in their emails. Zia can also analyze an email and understand if a customer's sentiment is positive or negative towards a competitor.

Based on these insights, your sales reps can identify leads or contacts that mention your competitors and quickly provide suitable solutions to gain their confidence and avoid churn.

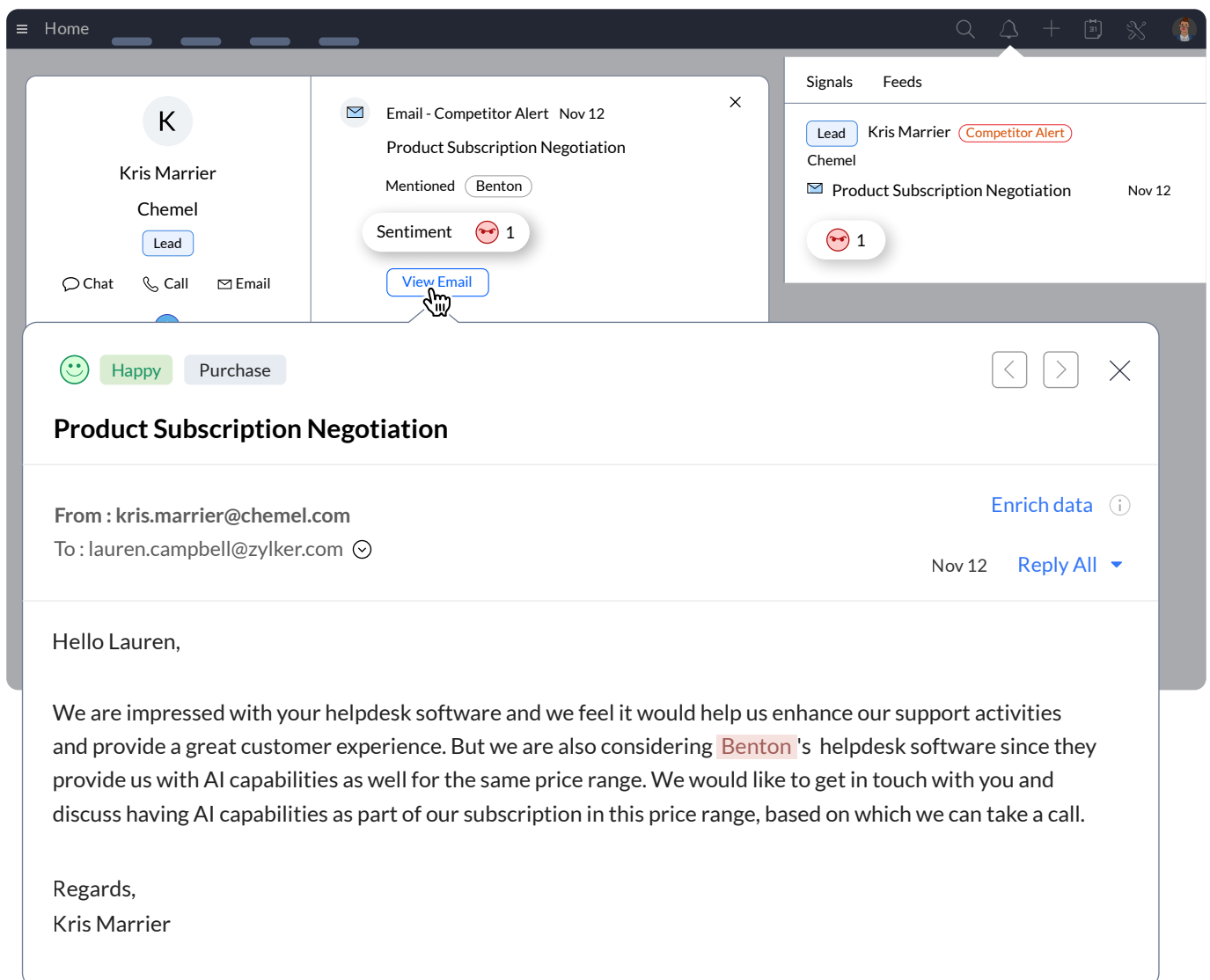
How it works

The flow diagram below depicts the working of competitor alerts in Zoho CRM:



Example scenario

You receive an email from a lead who's interested in buying your product, but the lead mentions that one of your competitors is offering him a similar product with AI features in the same price range.



The screenshot displays the Zoho CRM interface. On the left, a lead card for Kris Marrier (Chemel) is shown with a 'Lead' tag and communication options for Chat, Call, and Email. The main area shows an 'Email - Competitor Alert' notification from Nov 12, titled 'Product Subscription Negotiation'. It mentions 'Benton' and has a 'Sentiment' of 'Sad' with a count of 1. A 'View Email' button is highlighted with a mouse cursor. On the right, a 'Signals' panel shows a 'Competitor Alert' signal for Kris Marrier. Below, a detailed view of the email is shown, including the subject 'Product Subscription Negotiation', sender 'kris.marrier@chemel.com', recipient 'lauren.campbell@zylker.com', and date 'Nov 12'. The email body contains the following text:

Hello Lauren,

We are impressed with your helpdesk software and we feel it would help us enhance our support activities and provide a great customer experience. But we are also considering **Benton**'s helpdesk software since they provide us with AI capabilities as well for the same price range. We would like to get in touch with you and discuss having AI capabilities as part of our subscription in this price range, based on which we can take a call.

Regards,
Kris Marrier

Though there's nothing actually negative about your product, the lead has a more positive impression on your competitor's product, which is unfavorable to you. Knowing he has this impression, you can get in touch with the lead and offer the best possible deal.

Bottom line

- ✓ Automatically extract competitor mentions from emails.

Resources

To learn more about how to configure the competitor alert feature in Zoho CRM, please review the documentation below:

- ✓ [Competitor alert - help documentation](#)

Autocomplete

Why use autocomplete?

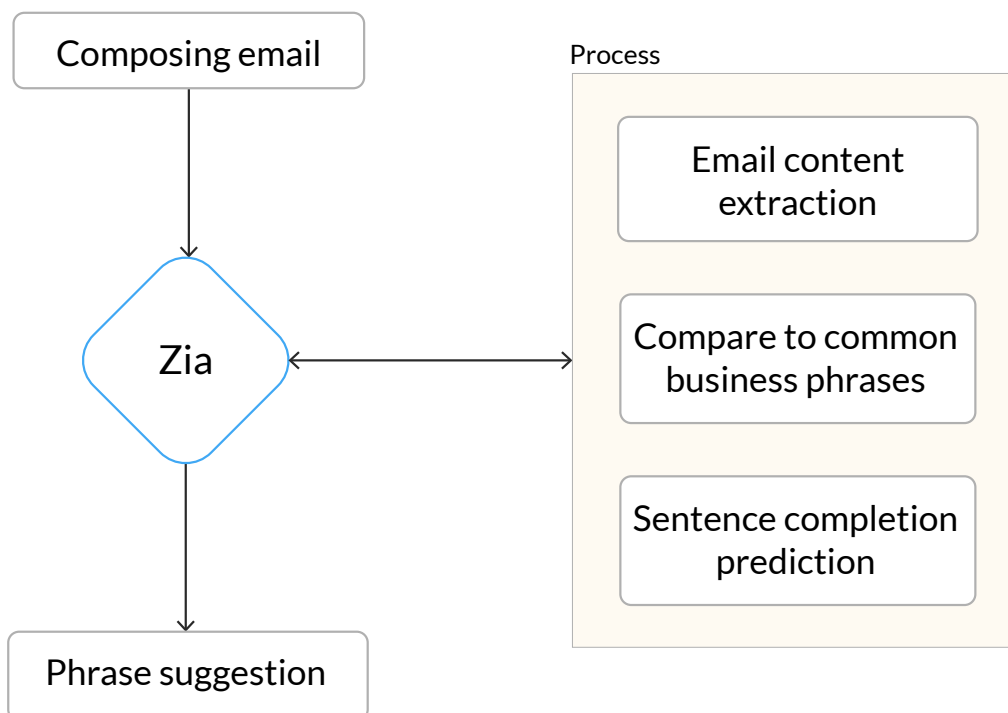
When you compose emails, you may often include content that is common or predictable. For example, if you're starting a sentence with "How", there's a good chance that you might be about to type "How are you?" or something similar. Zia provides you with more convenience by offering relevant phrase suggestions and helps you draft your email faster with the intended content.

Autocomplete in Zoho CRM

Once you enable Zia and start to draft an email, you'll receive phrase suggestions as you type. You can accept these suggestions or ignore them.



How it works

The flow diagram below depicts the working of autocomplete in Zoho CRM:



Example scenario

You get an email from a customer in which he expresses satisfaction over an issue resolved promptly from your end. You would obviously send a response thanking him. As part of your email, you start typing "It was a". Zia suggests a phrase like, "It was a pleasure talking to you." You can choose to accept the suggestion or ignore it and continue typing your own content.

To Peter Hugh
Subject
B <i>I</i> <u>U</u> S x_2 x^2 <u>A</u>  <u>I</u> _x 
Thank you for the feedback. Glad to hear that your issue was resolved satisfactorily. It was a pleasure talking to you

Bottom line

- ✓ Receive phrase suggestions during email compose.

Resources

To learn more about how to configure the autocomplete feature in Zoho CRM, please review the documentation below:

- ✓ [Autocomplete - help documentation](#)

Email subject line suggestions

Why suggest email subject lines?

Email subject lines are usually the most visible part of an email. They need to have the appropriate tone and also be catchy in order to get your customers' attention and enhance your emails' open rates. Zia can devise effective email subject lines for you.

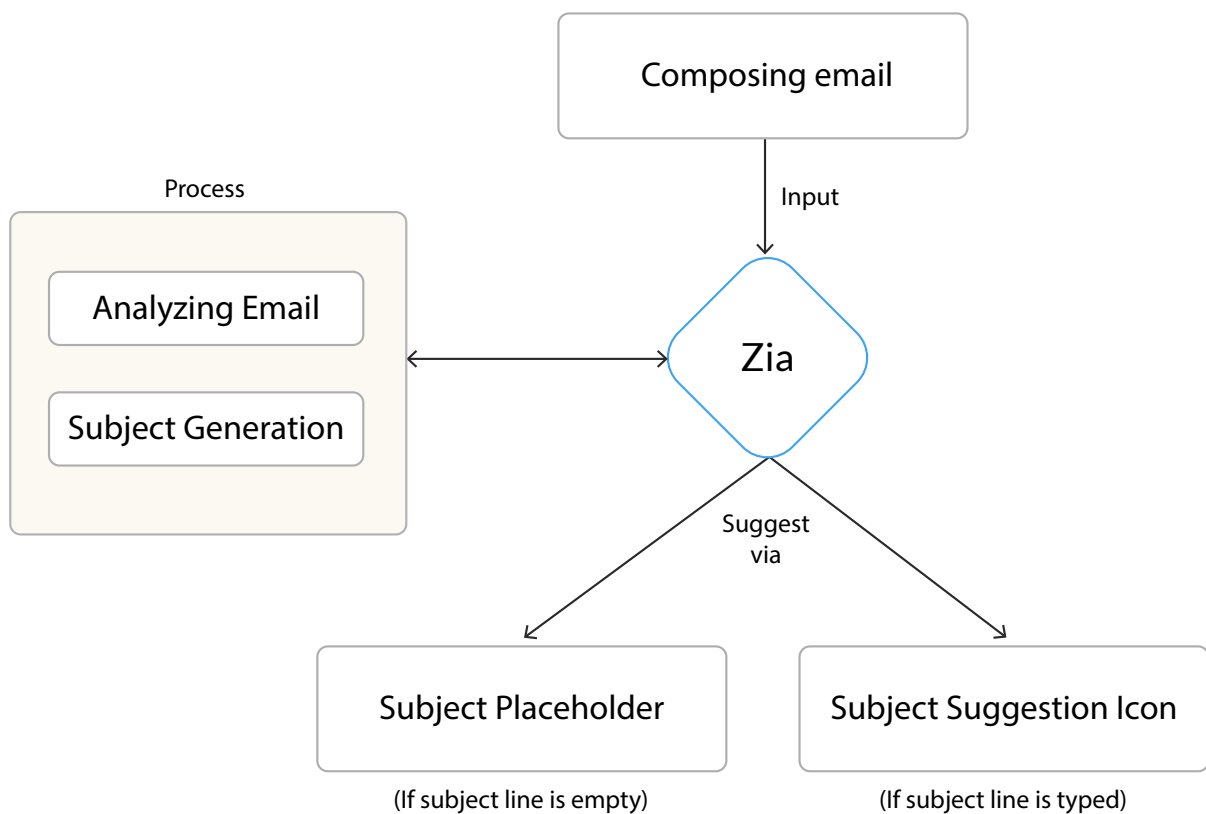
Email subject line suggestions in Zoho CRM

Zia will analyze the email content you type and suggest a suitable subject line for it in the subject box. You can click on the suggested subject line to use it, or ignore it and come up with your own.

In case you forget to add a subject line, Zia's suggestion will again appear in the "Specify email subject" pop-up, which you can again either use or ignore in favor of your own subject line.

How it works

The flow diagram below depicts the working of email subject line suggestions in Zoho CRM:



Example scenario

Suppose you've recently started a non-profit organization. Apart from receiving donations, you plan on conducting a small-scale sports meet to gain more visibility and raise funds for your organization. For this, you need sponsors. You've identified a few potential sponsors for the event and plan to initiate contact with them by email. As important as your email content is, you also need a solid subject line that will convince your sponsors to open the email and read it. Zia can help you generate effective subject lines.

Req
✕

Amelia Burrows <amelia.burrows@zylker.com>
Draft saved at 03:55PM Insert Template ▾

To James Merced Bcc Cc

Req 💡

Zia Suggested Subject Line ✕

Request for Sponsorship of Sports Event for Non-profit Organization.

Dear James,

We hope this message finds you well. On behalf of our non-profit organization, Zylker Welfare Association, we humbly request your assistance in sponsoring a sports event to be conducted by us to raise funds for our organization. We understand that this request may seem unexpected, and we thank you for considering to join us in our endeavour.

We hope that this initiative is a success, and we truly appreciate any help you can provide. Please do not hesitate to get in touch if you have any questions or queries.

We look forward to hearing from you.

Regards,
Amelia Burrows

Send

Bottom line

- ✓ Generate appealing email subject lines using Zia’s suggestions.

Resources

To learn more about how to configure email subject line suggestions in Zoho CRM, please review the documentation below:

- ✓ [Email subject line suggestions - help documentation](#)

Conversation intelligence

Call transcription

Why transcribe call recordings?

From identifying business requirements to providing post-purchase support, calls are an integral part of business processes. It's important that information from these calls is available for further processing towards various business activities. Rather than taking notes on the go during calls, you can employ Zia to transcribe the call.

Call transcription in Zoho CRM

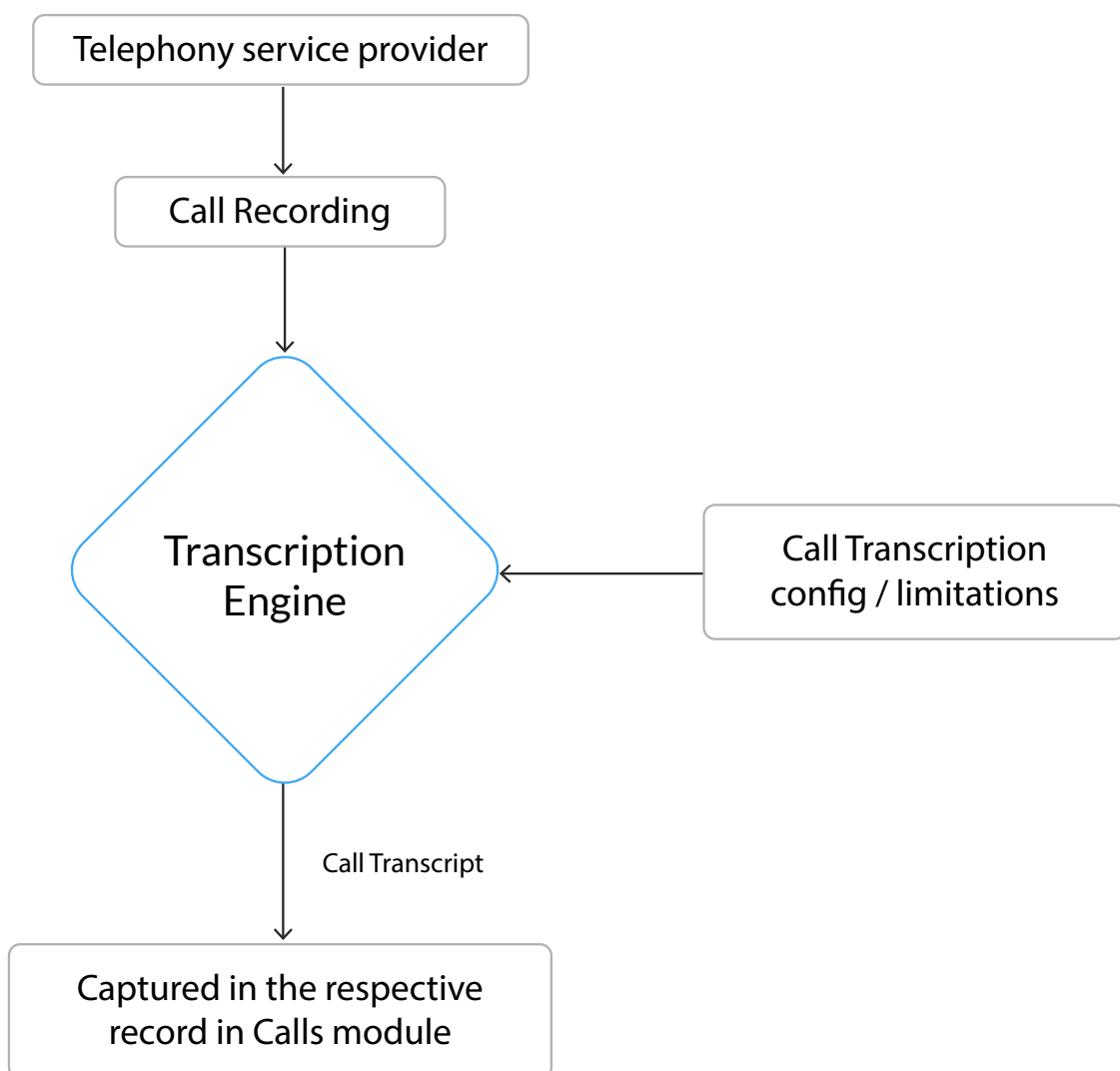
The call transcription feature in Zoho CRM automatically transcribes call audio recordings into plain text in the Call Activity module.

You also have the call transcription dashboard, where you can view information such as your minute limit for a particular month, minutes spent, minutes remaining, modules, profiles, call types, and the maximum duration of a single call in order for it to be transcribed.

From call transcriptions, you can obtain details such as the contact's sentiment, intent, and emotion, as well as a summary—thanks to Zia's call intelligence capabilities.

How it works

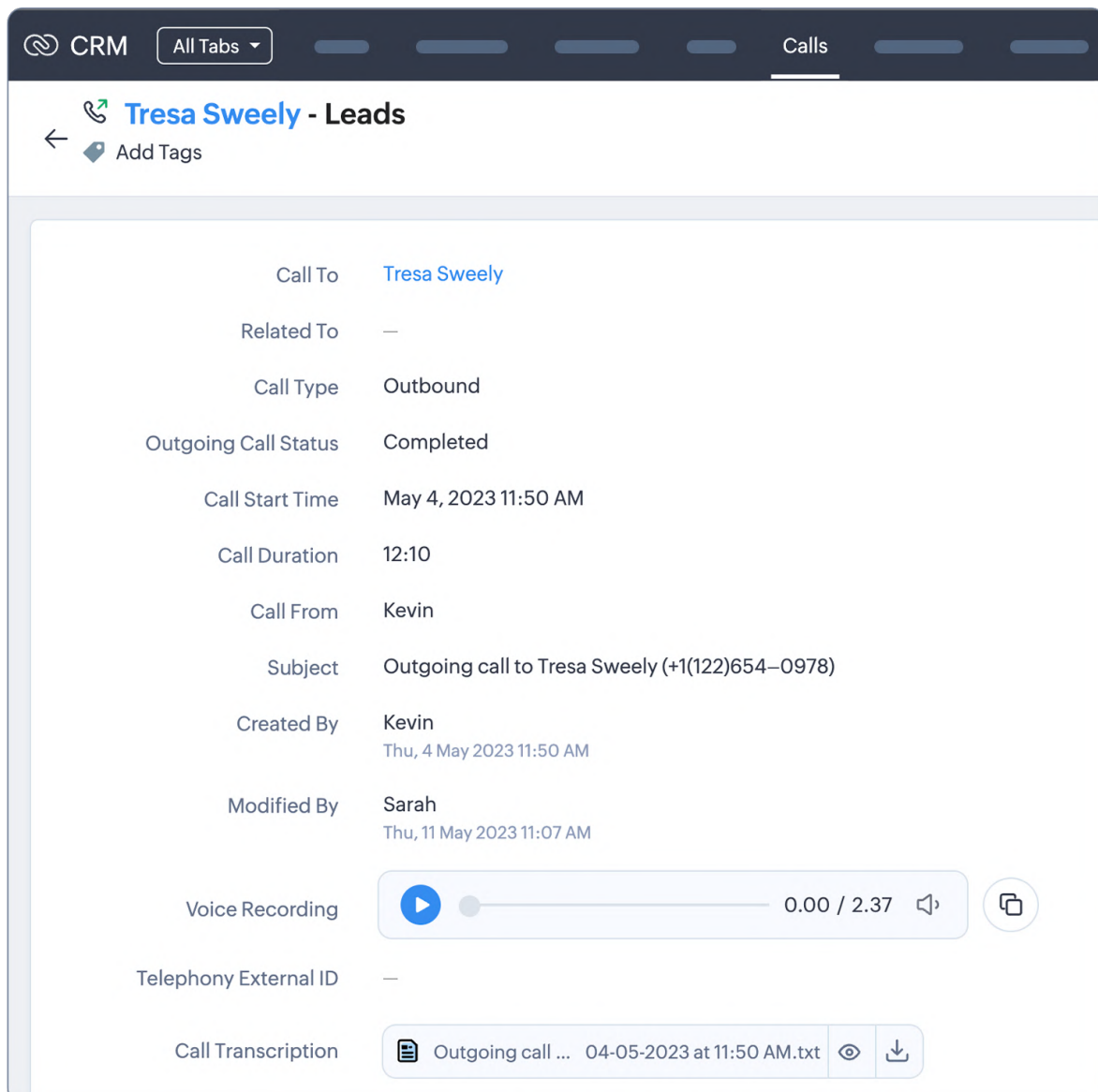
The flow diagram below depicts the working of call transcription in Zoho CRM:



Example scenario

One of your agents, Kevin, had a call with a lead to discuss her requirements. He provides her with a couple of solutions that can help address her needs. Before making further decisions regarding your product offering, she takes some time and returns a week later to resume further discussions.

For whatever reason, Kevin has left your organization by this time, and this lead has been assigned to another agent, Sarah. Fortunately, the call transcription feature transcribed Kevin’s call with the lead, which helps Sarah interact with the lead without the lead having to explain everything again from scratch.



The screenshot displays the Zoho CRM interface for a call record. At the top, there is a navigation bar with the Zoho CRM logo, 'All Tabs', and 'Calls'. Below this, the lead name 'Tresa Sweely - Leads' is shown with a back arrow and 'Add Tags' option. The main content area lists call details:

- Call To: Tresa Sweely
- Related To: —
- Call Type: Outbound
- Outgoing Call Status: Completed
- Call Start Time: May 4, 2023 11:50 AM
- Call Duration: 12:10
- Call From: Kevin
- Subject: Outgoing call to Tresa Sweely (+1(122)654-0978)
- Created By: Kevin
Thu, 4 May 2023 11:50 AM
- Modified By: Sarah
Thu, 11 May 2023 11:07 AM
- Voice Recording: A playback control bar showing 0.00 / 2.37 minutes with a play button and a download icon.
- Telephony External ID: —
- Call Transcription: A document icon followed by the text 'Outgoing call ... 04-05-2023 at 11:50 AM.txt' and icons for viewing and downloading.

Bottom line

- ✓ Transcribe call audio recordings as text documents.

Resources

To learn more about how to configure call transcription in Zoho CRM, please review the documentation below:

- ✓ [Call transcription - help documentation](#)

Call intelligence

Why analyze calls?

Information from calls can help you analyze the needs of your leads and customers and come up with effective strategies to resolve their needs. For greater productivity, you can lean on Zia to provide these analytics for you.

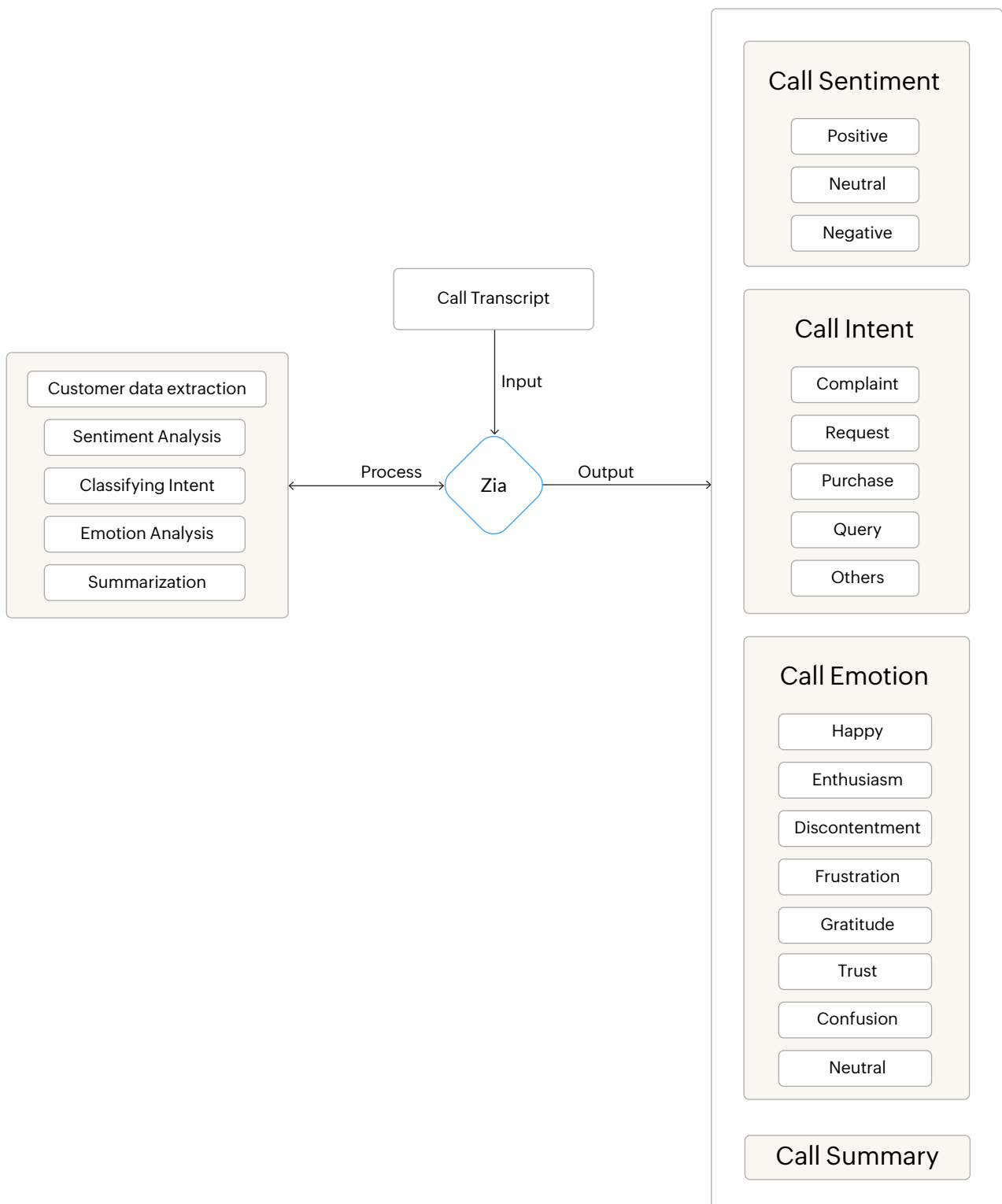
Call intelligence in Zoho CRM

Zia analyzes and fetches important details about calls after transcribing them, such as:

- **Call sentiment** - Identifies the overall sentiment of a call as either positive, negative, or neutral.
- **Call intent** - Identifies the intent with which a lead or customer called you.
- **Call emotion** - Identifies the particular emotion of a call as either happiness, enthusiasm, discontentment, frustration, gratitude, trust, confusion, or neutral emotions.
- **Call summary** - Summarizes the call in a single line of text.

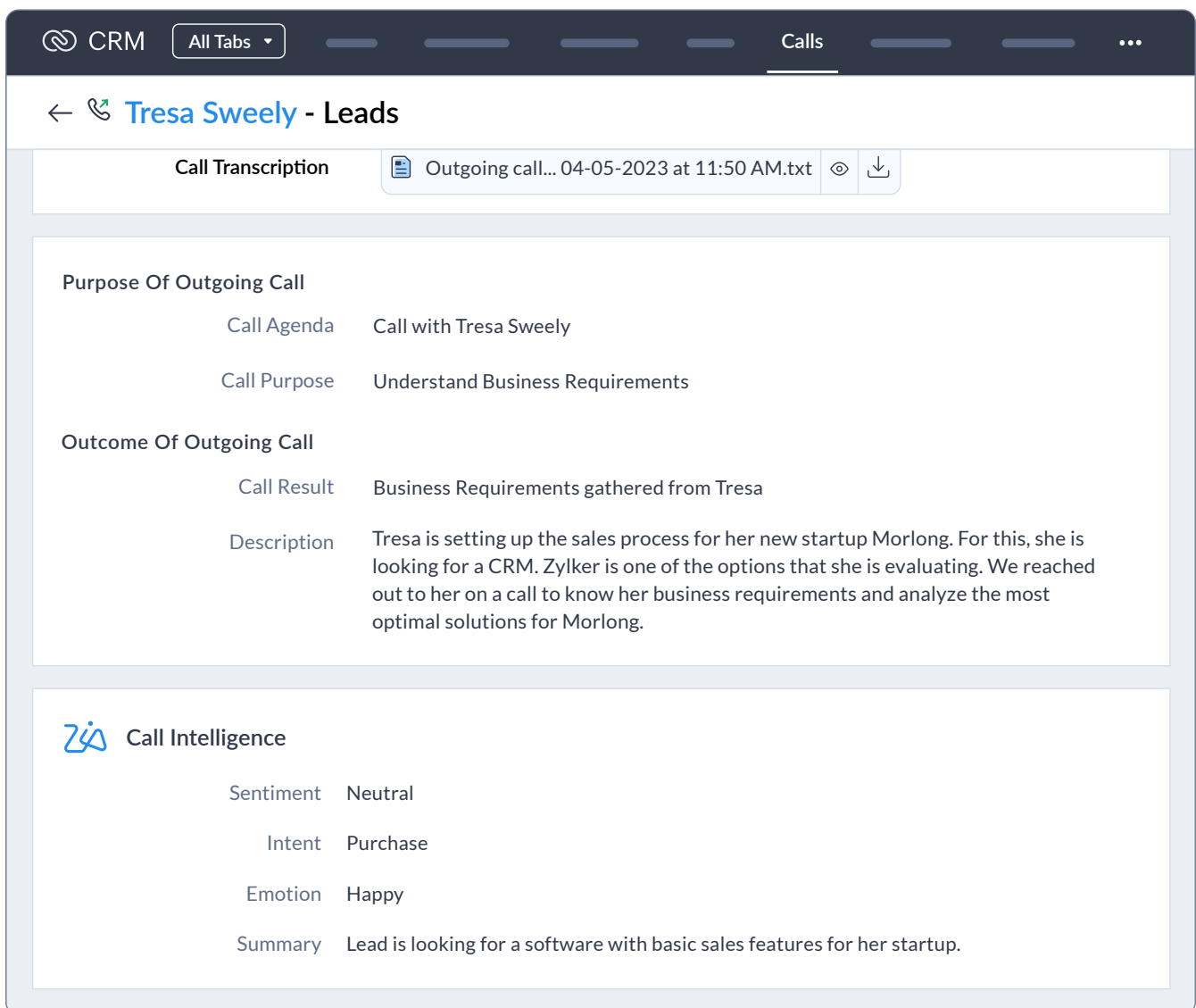
How it works

The flow diagram below depicts the working of call intelligence in Zoho CRM:



Example scenario

Consider the example in call transcription where Kevin interacts with a lead to know her business requirements. He leaves the organization before the lead gets back and Sarah takes over the ownership of the lead. Apart from using the call transcription, she can also leverage the call intelligence insights from Zia. Using these insights she can quickly get a brief overall picture on how the interaction went.



The screenshot shows the Zoho CRM interface for a lead named Tresa Sweely. The top navigation bar includes the Zoho CRM logo, 'All Tabs', and 'Calls'. The lead's name 'Tresa Sweely - Leads' is displayed with a back arrow and a phone icon. Below this, there is a 'Call Transcription' section with a document icon and the filename 'Outgoing call... 04-05-2023 at 11:50 AM.txt', along with eye and download icons. The main content area is divided into two sections: 'Purpose Of Outgoing Call' and 'Outcome Of Outgoing Call'. The 'Purpose Of Outgoing Call' section includes 'Call Agenda' (Call with Tresa Sweely) and 'Call Purpose' (Understand Business Requirements). The 'Outcome Of Outgoing Call' section includes 'Call Result' (Business Requirements gathered from Tresa) and 'Description' (Tresa is setting up the sales process for her new startup Morlong. For this, she is looking for a CRM. Zylker is one of the options that she is evaluating. We reached out to her on a call to know her business requirements and analyze the most optimal solutions for Morlong.). Below this is the 'Zia Call Intelligence' section, which provides sentiment (Neutral), intent (Purchase), emotion (Happy), and a summary (Lead is looking for a software with basic sales features for her startup.).

Purpose Of Outgoing Call	
Call Agenda	Call with Tresa Sweely
Call Purpose	Understand Business Requirements

Outcome Of Outgoing Call	
Call Result	Business Requirements gathered from Tresa
Description	Tresa is setting up the sales process for her new startup Morlong. For this, she is looking for a CRM. Zylker is one of the options that she is evaluating. We reached out to her on a call to know her business requirements and analyze the most optimal solutions for Morlong.

Zia Call Intelligence	
Sentiment	Neutral
Intent	Purchase
Emotion	Happy
Summary	Lead is looking for a software with basic sales features for her startup.

Bottom line

- ✓ Auto-detect call sentiments, intents, and emotions.
- ✓ Auto-generate call summaries.

Resources

To learn more about how to configure call intelligence in Zoho CRM, please review the documentation below:

- ✓ [Call intelligence - help documentation](#)

Voice of the Customer (VoC)

Why gauge customer pulse?

Oftentimes, the reason a customer becomes dissatisfied with a business is the gap between their actual needs and the product or service offered. Not acting on feedback and implementing relevant solutions leads to unhappy customers, which could result in churn. These issues could happen due to lack of understanding about the overall needs and sentiment of a lead or a customer.

Hence, it's important to gather customer feedback, analyze the data collected, and incorporate appropriate business measures systematically. But by the time you derive insights, you might lose customers in the meantime. Zia can expedite this process, provide accurate insights, and help you in your efforts to serve your customers more effectively.

Voice of the Customer (VoC) in Zoho CRM

Zia analyzes customer conversations and deduces what exactly the customers intend to communicate with you. Zia combines customers' feedback with their profiles to segregate them demographically. This enables you to understand which type of customers has what kind of needs. Using these insights, you can implement appropriate strategies to provide personalized solutions to your customers.

These insights are provided through various dashboards that depict your customers' outlook on your business and your competitors, as well as their emotions in emails, surveys, customer support tickets, and more. Consolidated dashboards also provide a summary of these interactions from all customers.

Each customer record in your CRM will have associated VoC data, that denote the feelings of a particular customer in their emails, surveys, support tickets, and so on.

VoC dashboards are classified into the following categories:

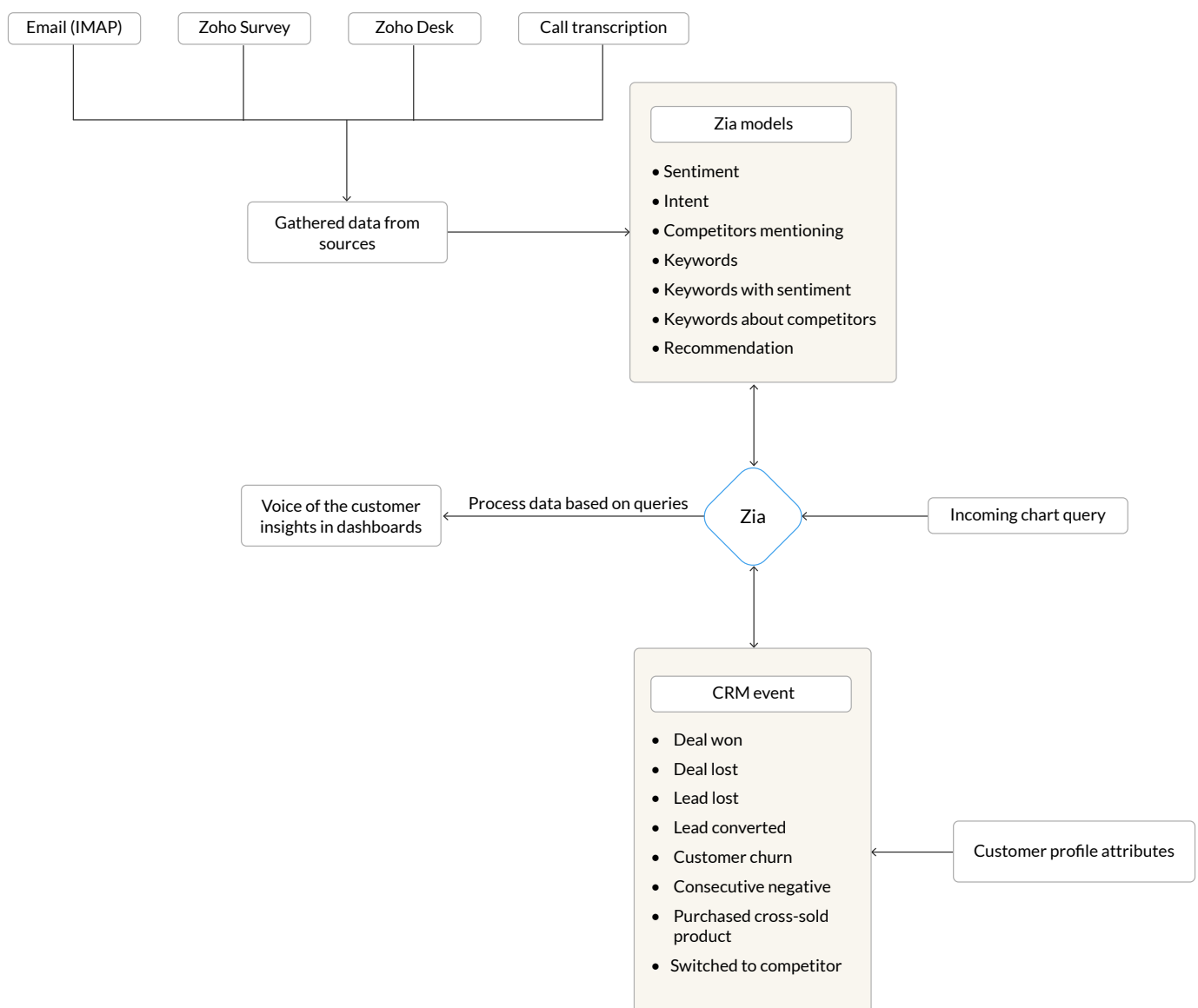
- **Response-based sentiment analysis** - Use 15+ dashboards to understand prevalent customer emotions and identify excessive negative emotions.
- **Sentiment-based profile analysis** - Use 21 charts to analyze and categorize customers as promoters or detractors based on emotions and intent, and identify churn trends and keywords used by customers that may indicate an impending loss of business.
- **Competitor analysis** - Gain insights into your customers' emotions about your business versus those about your competitors.
- **Survey comparison** - Get customer response and emotion analyses of top survey keywords to discover customer delights and disappointments.
- **Cross-sell analytics** - Peruse 25+ charts that provide suggestions about products and services based on respective customer sentiments identified through interactions and actions. Use these insights to determine upsellable prospects and products or services for cross-selling.
- **Segmentation analytics** - Segment customers across five charts using RFM scoring labels based on their recent purchases (R), frequent purchases (F), and monetary value (M) to analyze customer behavior.

Various charts and graphs are part of the dashboards for the aforementioned categories, namely:

- Pie charts and donut charts
- Line graphs
- Bar graphs—single, multi, stacked
- Cohorts
- Quadrants
- Waterfalls
- Gauge charts/dial charts
- Anomaly dashboards
- Word clouds and tables
- Sankey charts
- Marimeko charts

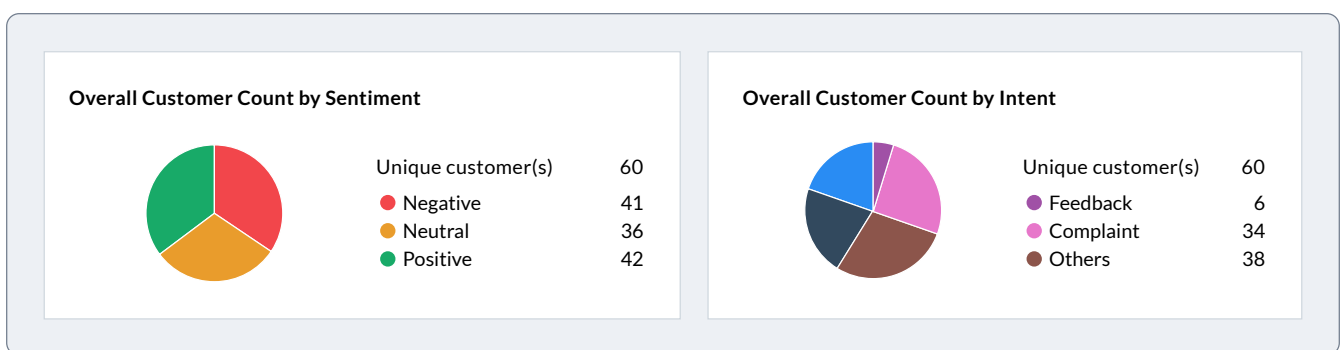
How it works

The flow diagram below depicts the working of Voice of the Customer (VoC) in Zoho CRM:



Example scenario 1

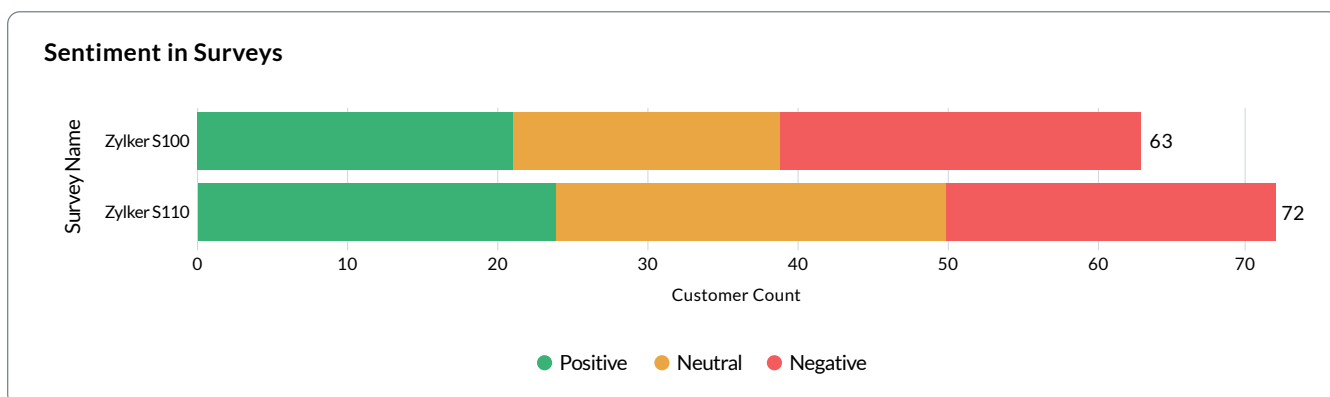
Imagine you teach and manage an online course. You try to analyze the various kinds of responses you have received for your course. You can use the below charts to get an overall view of customer responses to your course.



From the above graphs, you can see that there is a significant number of negative sentiments and complaints related to your course. You can look into the complaints and resolve them accordingly.

Example scenario 2

Let's consider you sell smartwatches. You have recently launched 2 new models in the same price segment and run surveys for both the models. You want to compare customer sentiment on both your models to plan further business strategies. You can use the Sentiment in Surveys graph that derives data from the earlier surveys you had conducted.



From this chart you can see that despite the lesser number of total customers, the number of negative sentiments is more in Zylker S100 model. This way you can look into what went wrong in the S100 model compared to the S110 and incorporate necessary changes.

Bottom line

- ✓ Derive holistic insights related to customer sentiments.
- ✓ Understand your customers’ outlooks on your business and competitors.
- ✓ Formulate an efficient and customer-centric business model.

Resources

To learn more about how to configure Voice of the Customer (VoC) in Zoho CRM, please review the documentation below:

- ✓ [Voice of the Customer \(VoC\) - help documentation](#)

Smart Prompt - Zia's integration with OpenAI for Zoho CRM

Apart from all of Zoho CRM's built-in AI capabilities, Zia also integrates with OpenAI to boost your generative AI experience further. The integration, known as Smart Prompt, helps you elevate the quality of communication with your leads and customers.

The integration suggests various prompts to help you generate high-quality and relevant content for your leads and customers and is applicable in the following pages:

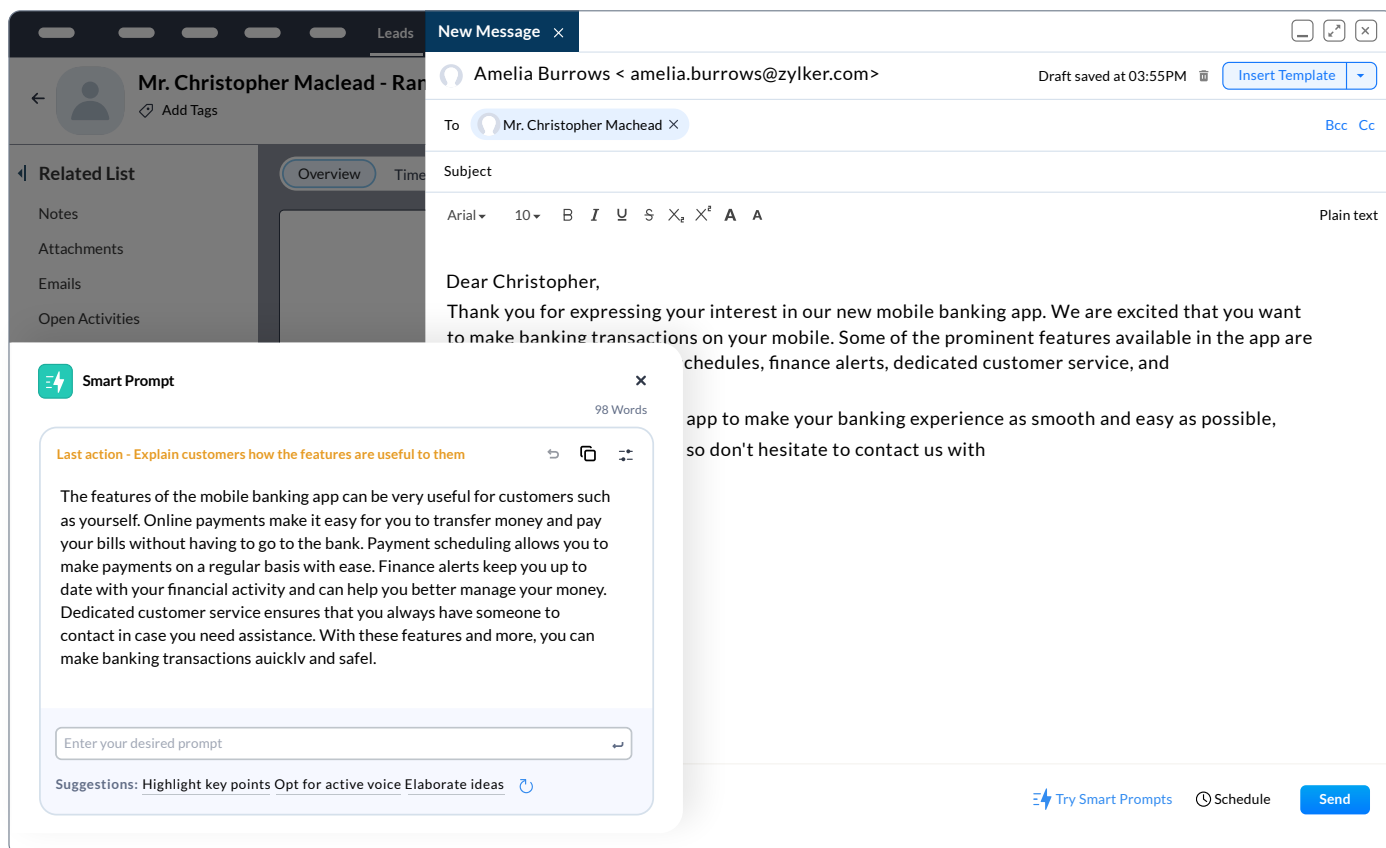
- Email composition window
- Email template creation
- Record details page

Email composition window

- Generate content from scratch when there's no content entered in your email composition window.
- Modify content if it's already available in your email composition window.
- Adjust the length and writing style of the generated content.

Example Scenario

Let's say you need to send an email about your product to a lead. You draft your content but feel that it needs a greater focus on the benefits your product offers the lead than on its features. Rather than a manual revamp, you can use Smart Prompt and revamp the content quickly.

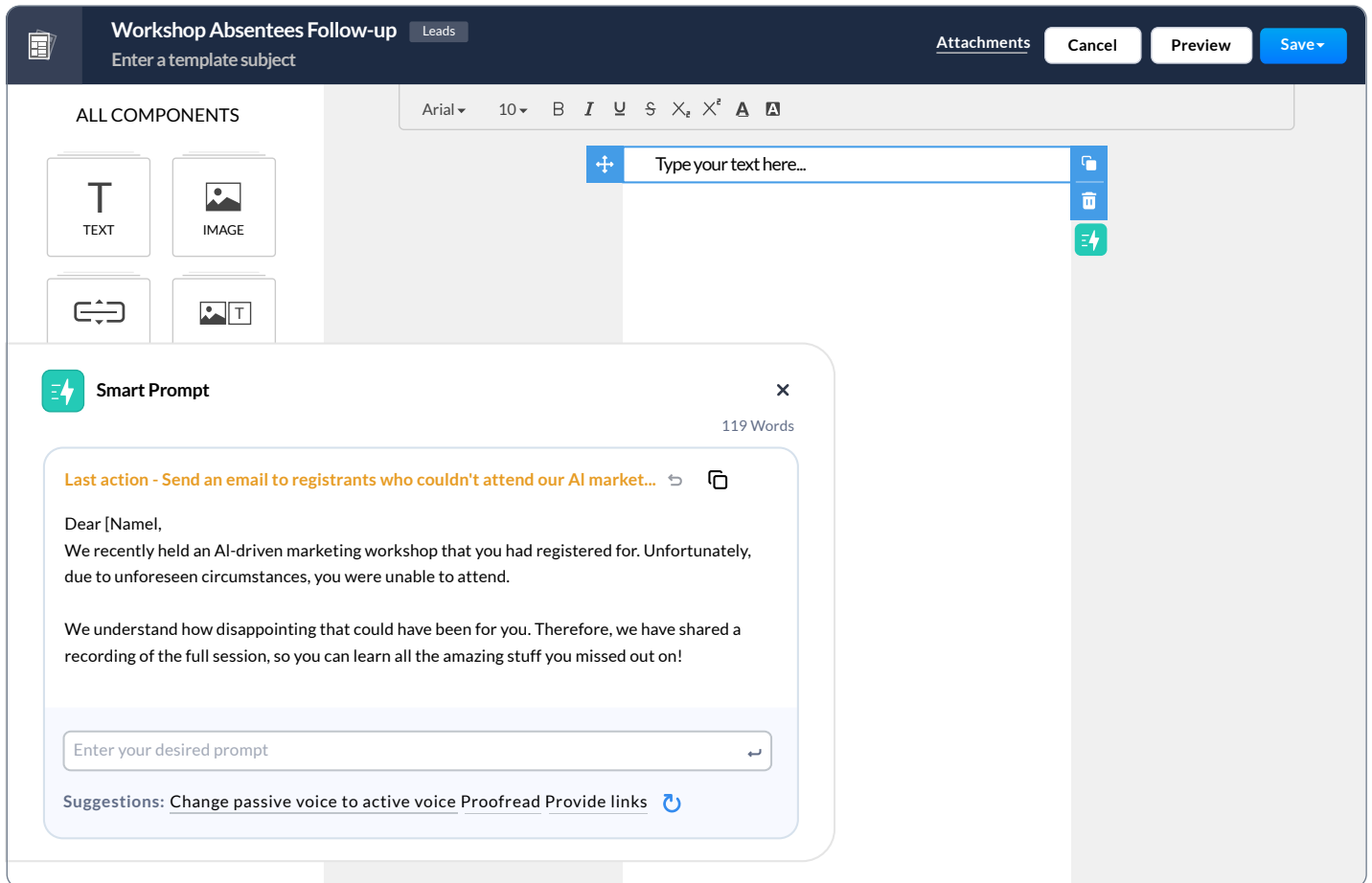


Email templates

- Generate content from scratch when there's no content entered in your email template content area.
- Modify content if it's already available in your email template content area.

Example Scenario

Imagine you need to send emails to registrants who missed your workshop on AI marketing. You decide to use a template for this to address such scenarios in the future as well. Rather than manually framing all of the template content, you can use Smart Prompt to draft the content for you.



Record details page

- Refine individual notes as required.
- Extract valuable information from fields on the record details page.

Example Scenario

Assume you've contacted a few vendors to print your product collateral. Rather than manually going through each vendor's website, you can use Smart Prompt to fetch each company's details from within the CRM. This information can help you learn more about a vendor and make appropriate decisions.

M

Morlong Printers

◀ Related List

- Notes
- Attachments
- Products 2
- Purchase Orders
- Contacts 1

Overview

Timeline

Hide Details

Vendor Information

Vendor Owner Kishore R

⚡

Smart Prompt

×

109 Words

Last action - Overview

↶ 📄

Vendor Name : Morlong Printers

Morlong Printers is a global technology company that specializes in printing solutions. Morlong Printers has a presence in over 50 countries and employs over 9,000 people worldwide.

Morlong Printers offers a wide range of printing services including screen printing, surface printing, digital printing, and more.

Suggestions: [Competitor Analysis](#) [Marketing Strategy](#) [Growth Potential](#) ↻

Resources

To learn more about how to configure Voice of the Customer (VoC) in Zoho CRM, please review the documentation below:

- ✓ [Smart prompt - help documentation](#)
- ✓ [Smart prompt - FAQ](#)

QuickML - Zoho's no-code machine learning pipeline builder

QuickML is a no-code machine learning pipeline builder service offered by [Zoho Catalyst](#) to build, test, deploy, and monitor ML models for various business requirements. It offers you pre-built ML algorithms, operations and data pre-processing techniques which you can connect with datasets and build your own ML models. You can leverage all these functionalities with no coding involved.

Zoho CRM can be used as one of the sources of data connector that can import data into QuickML for training and further processing.

After creating a pipeline flow and publishing it, you can execute it using the endpoint and the output of the pipeline will be displayed. You can also view the outcome from the QuickML model created, in widgets within Zoho CRM.

The execution details will be monitored and gathered by QuickML to gauge the performance and resource usage of your pipeline. These insights will help you devise the most optimal pipelines and hence maximizing benefits for your business.

Resources

To explore about QuickML in detail, you can refer to this help documentation :

✓ [QuickML - help documentation](#)

Note : The availability of a feature in a particular data center varies across the features. Please refer to a feature's help documentation to know its availability in a particular data center.

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