

# Zoho CRM Review: A Feature-Rich for growing Business

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## ABSTRACT

Zoho CRM empowers businesses to manage customer interactions and drive growth. This cloud-based platform centralizes customer data, simplifies sales pipelines, and offers basic marketing automation, even in its free plan. Zoho CRM enhances customer service with a 360-degree customer view and improves team productivity with its mobile app. Affordable, user-friendly, and scalable, Zoho CRM is a compelling solution for businesses of all sizes seeking to strengthen customer relationships and achieve success.

**Keywords:** Affordable, user-friendly, scalable.

## I. INTRODUCTION

Zoho CRM is a cloud-based customer relationship management [CRM] platform that helps businesses manage interactions with leads and customers. It's a popular choice, especially for small and medium-sized businesses [SMBs] [1], Zoho CRM is a highly-rated solution and one of few to offer a free plan for 3 users. Beyond this, it offers several competitively priced paid plans to accommodate various needs and budgets. Overall, the feature-to-price value is high, and you get over 800 integrations.[3] Its free CRM plan is popular among new businesses looking for a free way to track leads and manage contacts easily. For more robust features, users can always upgrade to a paid plan, which will unlock several features, such as automating marketing tasks and tracking customer and contact data. Zoho CRM also offers seamless integrations with other Zoho tools and third-party apps you may already use, such as Mailchimp, Google Analytics and QuickBook[2]. It's a popular choice for businesses of all sizes, from startups to large enterprises, with over 250,000 businesses using it worldwide. Zoho CRM is a compelling CRM solution for businesses seeking a feature-rich platform that scales with their growth. The free plan makes it a great option for startups, while paid plans offer advanced functionalities for established businesses. Its affordability, customization options, and integrations make it a strong contender in the CRM market. However, consider the learning curve and potential complexity for extensive customizations before implementing it for non-technical teams.

Considering the diverse CRM features it offers, Zoho CRM is affordably priced compared to its competitors. This can be a major attraction for startups and small businesses. However, if you specifically want a CRM tool that's simple to use or offers hyper-specific industry-related features, there are better options available.[5].

## Zoho CRM Company Overview & History

Zoho CRM is a product of Zoho Corporation, a company specializing in software development with a range of products from CRMs to office suites. Renowned businesses globally use it. It's a private entity owned by Sridhar Vembu and headquartered in Chennai, India.

Some of its notable board members include Sridhar Vembu and Rajendran Dandapani. The company's mission is to offer a comprehensive suite of online productivity tools.

Established in 1996, Zoho has consistently expanded its product range, with CRM being one of its flagship products.[4]

## Key Features of Zoho CRM

**1. Lead Management :** Zoho CRM's lead management is a top highlight in Zoho reviews. Through a centralized dashboard, it offers everything you need to automate lead workflows, from email campaigns to drip sequences.

We found that the lead management capabilities seamlessly integrate with the deal management tools, account [and contact] management, and partner portals, too.

Teams can also capture leads from multiple sources, including websites, forms, emails, and social media. Plus, as you'd expect, you can also prioritize leads based on potential.[1]

**2. Sales Forecasting Automation :** While Zoho CRM's advanced automation tools can only be accessed with the higher-end plans, with these features, you can automate routine sales, marketing, and any other repetitive task.

You can create optimized workflows that automatically eliminate double entries and errors, for example, or prevent the need for manual data entry and increase overall process speed.

Sales force automation also handles email, phone, social media, and customer portal communications. We found this all worked pretty smoothly. The sales pipeline visualization is also quite intuitive.

We could track deals throughout stages and use analytics for insight into challenges and opportunities. From here, you can forecast sales and get inventory predictions based on current activities.[5]

**3. Journey Builder :**With this popular Zoho CRM feature, you can personalize, design, and visualize end- to-end customer journeys with simple drag-and-drop functions. Each stage of the journey can be automated, too.

This is key to creating meaningful customer experiences, but one other thing we noted is that you can also track customer journeys in real-time to know where each one is in your pipeline.

Beyond this, you can set trigger messages and actions for any platform, analyze performance, and adjust if needed.[2]

**4. Advanced CRM Central Dashboard:** Zoho CRM not only stands out from the competition by offering a truly feature-rich platform. The company also strives to provide customers with a 360-degree view of all their data and operations.

From the dashboard, you can track interactions, emails, calls, notes, and meetings, amongst others, for a good overview of all client interactions with your business.

We were impressed to find that you can also personalize products to deliver targeted content and offers based on customer data or segment customer groups based on shared characteristics.[1]

**5 .Canvas :**A truly unique Zoho CRM feature is Canvas. With this, you can truly personalize and customize your CRM dashboards. In fact, you can design your own CRM with the built-in CRM design studio.

We found that all this entails is dragging and dropping items and products that you want to feature without needing a line of code. This somewhat reminded us of our time reviewing Systeme.io.

You can modify fields, buttons, and lists or change colors and templates in just a few clicks. You can choose what data to include, control what others see, and find inspiration in the Canvas gallery.[3]

**6. Business Analytics and Reporting :** Zoho's business analytics offer impressive capabilities, though, as we found when reviewing Pipedrive, for example, mastering them requires slightly more effort than with some others.[5]

**7. 360-degree customer view:** Zoho CRM Plus offers a 360-degree customer view, providing access to important client information, such as contact information, name, location and all sales or marketing communication sales reps have engaged .This comprehensive view is accessible through one unified interface.

**Popular analytics and reporting Zoho CRM features include:**

1. Forecasting reports used to predict future events
2. Territory Management to visualize and manage different regions
3. Multiple currencies support which unifies international sales
4. The company also offers AI prediction business reports to monitor, understand, and plan for the future based on real-time data. Beyond all this, you can also:
5. Generate customizable reports to metrics like sales performance
6. Visualize your pipeline or customer data in neat dashboards
7. Identify trends to make better decisions for your campaigns

**Standout Functionality**

1. Multi-channel Communication: Unlike many CRMs, Zoho offers a consolidated view of communications across platforms.
2. Advanced Analytics: It provides more in-depth insights compared to many competitors.
3. Workflow Automation: Zoho's automation is particularly intuitive and reduces the need for manual intervention to a great extent.

**Zoho CRM Integrations:**

When it comes to integrations, the list that Zoho CRM offers is extremely long [800+]. That said, the most popular ones, including Outlook and Google Calendar, are easy to set up, configure, and use.[3]

As we'll see in the section below, other integrations are a common complaint Zoho CRM receives. Before we dive into that, here are some of the many popular integration options available:

1. Google Workspace
2. Microsoft 365x
3. SMS-Magic
4. Zoho Meeting and Webinar
5. Intuit Quickbooks
6. Adobe sign
7. Google Ads[3]

### **Zoho CRM Pricing**

Zoho CRM offers multiple pricing plans:

- 1. Free Plan**
2. The free plan allows up to three users to track contacts, leads, accounts and deals. You can also log events, calls and notes on your contacts and leads. You'll be able to set workflow rules to automate specific tasks, such as notifying sales to email leads based on a date. Automation is limited on the free plan, and you'll miss out on lots of customizable tools. Zoho CRM allows free users access to standard reports, but nothing beyond that.
3. For many individuals or small businesses just getting started, the free plan from Zoho CRM could be a good starting point. There are glowing Zoho CRM reviews for those who love the free plan because of its generous features, but it's also noted that small businesses are likely to grow out of the plan quickly.
4. Using the free plan, you can set up basic lead, account and deal management. You can also create and store documents, communicate via feeds and set up task reminders. However, you won't get access to the social tab for Facebook and Twitter, nor can you accept calendar bookings from your website to your CRM. For these and more features, you may want to upgrade to at least the Standard plan.
- 5. Standard Plan**
6. In Zoho CRM's Standard plan [\$14 per user, per month], you'll get access to tools that can aid your sales and marketing teams in many ways. You'll get sales forecasting, lead scoring rules and multiple pipelines. You'll also be able to create custom reports [but you're limited to 100], data analysis of key performance indicators [KPIs] and automation of marketing campaigns. It's an ideal plan for small businesses with teams that need to track sales and marketing efforts because of the upgraded features and affordability.
7. Although you won't get many more new features on the Professional plan [\$23 per user, per month] in regard to automation, limits are

lifted in some cases. It is at this level you'll be able to integrate Google Ads with Zoho CRM and you'll get inventory management. The Professional plan from Zoho CRM is a good pick for retailers [online or brick-and-mortar] that don't want to manage inventory in a separate app.

8. Another big feature you get on the Professional plan is mass email scheduling. All but the free plan can send mass emails, but it's at the higher levels that you can schedule them. Professional plan users also unlock customer support features. You can create cases and solutions, take customer issues via a web form and create assignment rules [20 per module].
- 9. Enterprise and Ultimate Plans**
10. Zoho CRM's top-tier plans, Enterprise and Ultimate, [\$40 and \$52 per user, per month, respectively] are where you'll find artificial intelligence [AI]-powered features to help you predict conversion of leads and sales trends, for example. There are also more process management features, such as approval and review processes.
11. On these upper tiers of Zoho CRM, you'll find automated segmentation, another time saver for large corporations. There's also split testing for web forms and specific analytics of web forms. Of course, this might be a little too much CRM for a small business but, for enterprise-level businesses with large sales teams, it's an affordable option compared to higher-priced competitors.

### **Pros of Zoho CRM :**

1. What helps this product or service stand out in a good way?
2. In our Zoho review, we found one of the biggest benefits of Zoho CRM is that it offers a free plan that while limiting, is still quite valuable. All plans let you create contact lists, generate leads with drag-and-drop forms, include customization and workflow automation and offer email marketing.
3. Its interface is immediately intuitive, so it's easy to learn and use. You can connect other Zoho apps, even on the free plan, but paid plans get access to hundreds of apps.
4. Zoho CRM's mobile app gives you quick access to your contacts, leads, notes and deals. Plus, it makes it easy to call leads and clients directly from the app on your phone. The mobile app is available for iOS and Android.

5. Zoho named its artificial intelligence [AI] tool Zia, which does more than offer predictive analysis. She can take dictation, find data you need and spot anomalies based on sales trends, for example. Zoho CRM's AI-powered tools are only for the top-tier plans. The predictions are helpful with figuring out the best time to contact clients and prospects and automatically capture information on them through emails they send you.
6. You'll have 30 days to request a full refund for Zoho CRM's monthly service [annual subscribers get 45 days]. Zoho even goes further to make sure you're happy by offering a five-day buffer period after your renewal date in case you forget to cancel immediately.

#### **Cons of Zoho CRM:**

What could be interpreted as a negative, at least for some types of users?

1. Low-tier users of Zoho CRM are limited by the number of users allowed and some features. For example, the free plan only allows up to three users and AI tools are only available on the higher-priced plans. You also may not find apps you want to integrate on lower plans.
2. Free plan users also miss out on sales forecasting, calendar booking and customization. You can create custom list views of your data but, on the free plan, you're limited to five list views per module. So, you can customize your view of whichever fields are most important to you. But on the free plan, you can only see five at a time and 50 per module on the Standard plan. Higher plans are unlimited.
3. It's worth noting that while most reviews of Zoho CRM are positive, some customers aren't satisfied with Zoho's customer support. Although the software gets overwhelmingly positive reviews for being easy to use, not everyone agrees. Some Zoho reviews say it's difficult to set up CRM integrations with third-party apps and even Zoho's many services.
4. more than is customary. This measurement and others are deliberate, using specifications that anticipate your paper as one part of the entire proceedings, and not as an independent document. Please do not revise any of the current designations.

#### **Top Zoho CRM Alternatives :**

1. While Zoho CRM is an excellent entry-level CRM, it may not be the best choice for every business. You can find plenty of Zoho CRM alternatives that could fit your CRM strategy better. HubSpot is a great CRM that can help every department in your company, but it leans more toward marketing. Salesforce is the CRM that started it all, which maintains its emphasis on sales force automation, although it's also a good fit for marketing and support teams.

1. **Zoho CRM vs. HubSpot:** We compared Zoho CRM vs. HubSpot and found that both CRMs are helpful for various departments in small businesses, and there are a lot of similarities. Both offer feature-packed free versions, so it's easy to get started with a CRM regardless of the size of your company. However, Zoho CRM is much more affordable, so it scales better for smaller businesses with smaller budgets. If you're looking for more robust marketing features, HubSpot could be worth the extra cost.
2. **Zoho CRM vs. Salesforce:** In almost any Zoho CRM review, you'll read about how affordable the platform is, but it has a few other advantages even compared to the original CRM: Salesforce. We looked at Zoho CRM vs. Salesforce and discovered that Zoho CRM allows workflow automation on all plans. Zoho CRM offers a free plan while Salesforce only offers a free trial. Salesforce is a powerful solution for sales teams looking to level up their CRM game.

#### **Is Zoho CRM Right for You?**

Given that Zoho CRM is such an easy-to-use CRM, it's an ideal pick for startups and small businesses that need client and contact management, along with sales forecasting and marketing automation features. You may not have a need for advanced features, such as AI-powered tools, but Zoho CRM scales easily with five different plans. So, if your business grows and your teams require more sophisticated features, those features are present.

**Review :** In our Zoho review, we found the CRM landscape is crowded with options, Zoho CRM stands out for its unique blend of affordability, user-friendliness, and powerful features. Here's how Zoho CRM distinguishes itself from the competition:

**Affordability Advantage:**

1. **Free Plan:** Unlike many competitors that offer only limited free trials, Zoho CRM boasts a free plan with core functionalities. This makes it an excellent choice for startups and budget-conscious businesses to dip their toes into CRM without breaking the bank.
2. **Scalable Pricing:** Zoho CRM offers tiered pricing plans that grow with your business. You only pay for the features you need, unlike some competitors with expensive all-in-one packages.

**a. Ease of Use Triumphs:**

3. **Intuitive Interface:** Navigating Zoho CRM is a breeze. Its user-friendly design minimizes the learning curve, allowing teams to get started quickly and focus on managing customer relationships, not wrestling with complex software.
4. **Customization Options:** Don't be fooled by the simplicity; Zoho CRM offers customization options to tailor the platform to your specific workflows. This level of control allows you to streamline your processes without getting bogged down in technical complexities.

**Feature Powerhouse:**

5. **Marketing Automation [Even in Free Plan]:** Zoho CRM sets itself apart by offering basic marketing automation features like email marketing campaigns and lead nurturing even in the free plan. This empowers even startups to nurture leads and automate marketing tasks. Paid plans provide even more advanced functionalities.
6. **Seamless Integrations:** Zoho CRM integrates effortlessly with other Zoho applications like Zoho Marketing Hub and Zoho Finance, creating a unified business ecosystem. Integrations with popular third-party apps further enhance its functionality.
7. **However, Zoho CRM isn't perfect for everyone. Here are some things to consider:**
8. **Limited Customization Compared to Some:** While Zoho CRM offers customization options, it might not be as extensively customizable as some high-end CRMs catering to large enterprises with highly complex needs.
9. **Advanced Analytics Might Require Zoho Analytics:** For in-depth sales pipeline or marketing campaign analysis, you might need to integrate Zoho CRM with Zoho Analytics, a separate BI platform.

**CONCLUSION**

In conclusion, Zoho CRM stands out as a compelling customer relationship management [CRM] platform for businesses of all sizes. Its affordability, with a free plan and scalable paid options, makes it accessible to startups and budget-conscious businesses alike.

Zoho CRM prioritizes user-friendliness with an intuitive interface that minimizes the learning curve. Despite its ease of use, it offers powerful features including marketing automation [even in the free plan] and seamless integrations with other Zoho applications and popular third-party tools. While some highly technical teams might require more extensive customization options, Zoho CRM's blend of affordability, user-friendliness, and robust functionalities makes it a strong choice for businesses seeking to streamline customer interactions, boost sales, and cultivate stronger customer relationships.

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