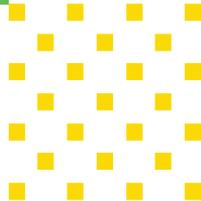
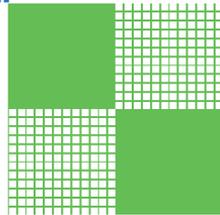
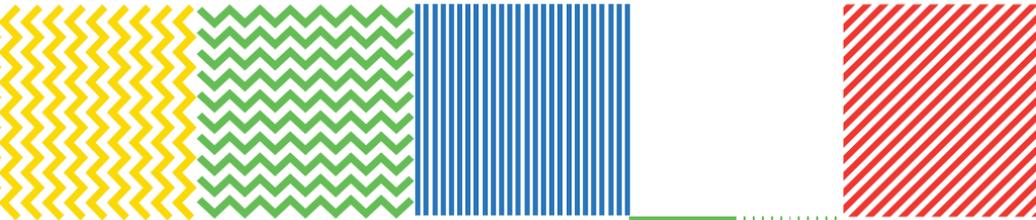


zOHO One

IMPLEMENTATION GUIDE



PARTNER'S
DIGEST



**VIJAY SUNDARAM ON
CREATING VALUE FOR
OUR PARTNERS**

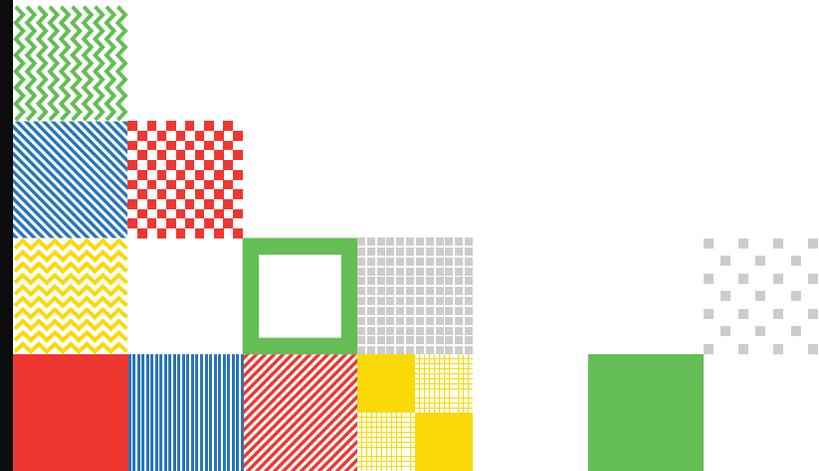
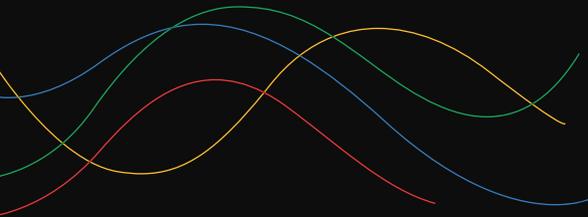
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**6 STEPS TO EFFECTIVELY
IMPLEMENT ZOHO ONE**

PAGE 14

**WHY YOU CANNOT
IGNORE EMPLOYEE
SATISFACTION**

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VIJAY SUNDARAM *ON* CREATING VALUE FOR OUR PARTNERS



A discussion on value never starts with price, or discounts.



Vijay Sundaram
Chief Strategy Officer
Zoho Corp.

We at Zoho do not need to discount our products. We have a very clear and transparent pricing strategy. We offer incredible value to our customers and partners in the form of amazing product capabilities, at surprisingly affordable prices.

Our strategy is -

EVERY DAY ONE PRICE,
which happens to be low.

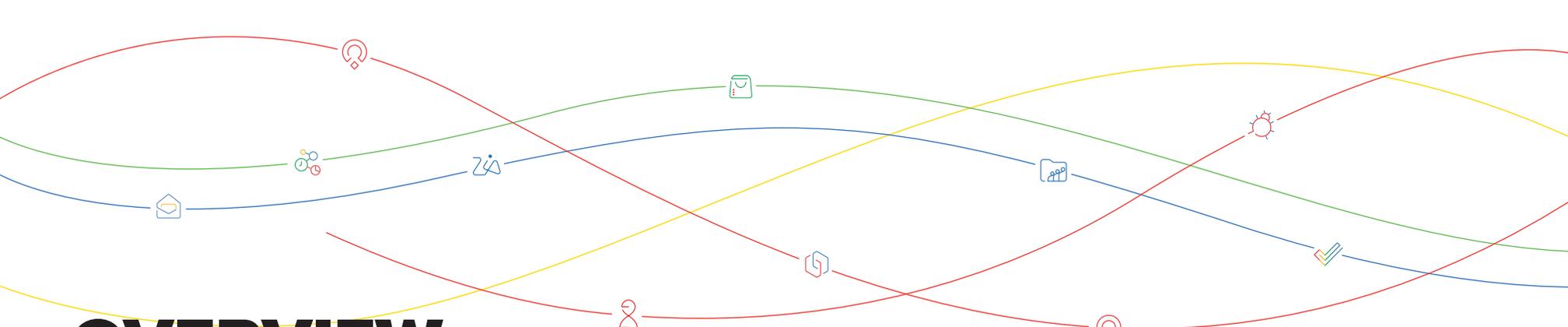
Put simply, this is incredible value everyday. No gimmicks. No sales tactics. No conditional discounts. No promotions. No Valentine's Day deals. No end-of-month or quarter deals. We stand by this strategy and we do not dilute it.

We seek partners who believe more in our value propositions and honesty in business, than in profits. The role of all our communications and marketing is to make that value self-evident, as much as possible. That's our only job as spokespeople for Zoho-to bring out the value.

Value is communicated in a number of ways and here are some:

- *strong product capabilities*
- *a willing and open partnership*
- *a sincere interest in addressing partner issues and pain-points*
- *honesty and integrity in our dealings*
- *our track record of rapid innovation*
- *our ability to keep adding more and more value without passing on the costs, or raising our price*
- *a culture they can trust*

These are the virtues we believe in and these are the virtues we communicate.



OVERVIEW

Zoho One has changed the game for many of our partners. We are glad to see them maximizing the potential of this platform. Our partners now have an array of applications and custom solutions to choose from with multiple integrations and plugins, all available within Zoho One. Many of our partners have expressed an interest in a defined structure for implementation, that they can use as a blueprint while analyzing a customer's business.

 *The most time-consuming process that partners face is analyzing the requirements of their customers' businesses, which occurs even before they can move on to the implementation or consulting phase.*

Understanding the customer's overall business is usually the most important aspect of consulting.

To help our partners with this potentially tedious process, we have come up with an integrated Implementation Guide for Zoho One. This guide is much more than a help guide or set-up guide. This Implementation Guide for partners will cover everything from preparing an organization before implementing a solution to long-term support for a business.

We recognize the variety and depth of services that our partners provide their customers. This variety requires effective categorization of business processes. This guide will not only help you define and categorize the solutions you provide to your customers, but will also help speed up the process.



IS THIS JUST ANOTHER HELP GUIDE?

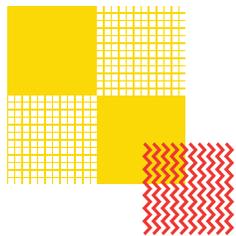
- There are already help and set-up guides for our partners, for various individual products as well as for **Zoho One**.

—

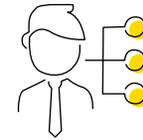
This is not another help guide about how to set up Zoho One for an organization. This guide will provide to a defined and categorized blueprint of a business process for analyzing a customer's business prior to implementation.

All businesses have some common workflows and business processes, which can be beneficial in the long term with efficient management.

WHY AN IMPLEMENTATION GUIDE?



This Implementation Guide
will help partners —



Understand their
customers' business
strategies and business
processes



Increase their market
reach in the long run



Build trust among their
customers

These benefits are interrelated. An effective blueprint or Implementation Guide can help our partners most efficiently make sense of their customers' business processes and strategies, allowing them to provide more effective implementation solutions for them.

THE 06 STEP PROCESS

ST EP 01 PREPARE YOUR ORGANIZATION

Equip your business before implementing a solution



ST EP 02 IMPLEMENT THE SOLUTIONS

Make sure to train your employees while implementing a solution for best results



ST EP 03 ENGAGE WITH YOUR EMPLOYEES

Employee engagement and satisfaction is at the core of your business



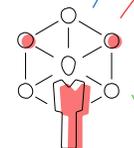
ST EP 04 INTERACT WITH YOUR CUSTOMERS

Interacting with your customers can be a very rewarding experience for your business



ST EP 05 BUILD A STRONG CHANNEL

A loyal customer base and a strong customer community is crucial



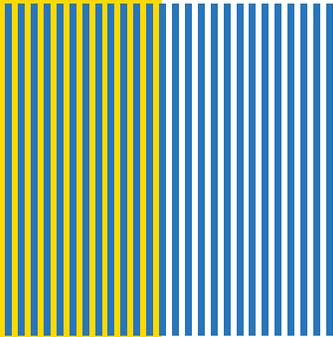
ST EP 06 EXTEND YOUR BUSINESS

As your business starts to grow, invest in extending your business through the partner network



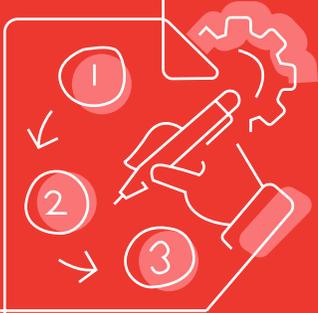
Before the partner can select the right solutions for their customer's business, they need to be sure that the business is in a position to successfully implement the new solution or software.

Partners want to provide the right solution for their customer's business rather than maximize the number of solutions they offer.



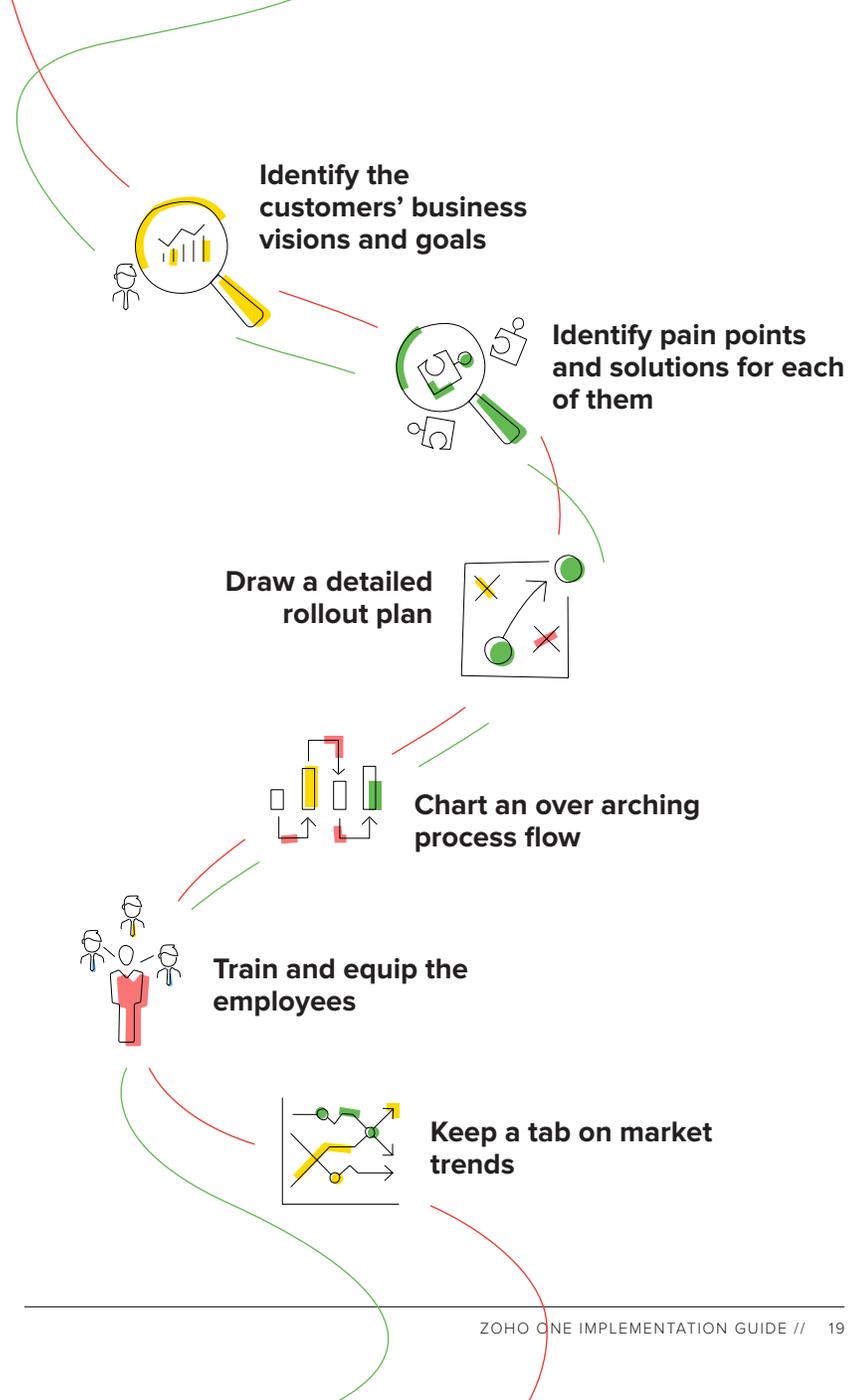
They can only do this if they are sure they fully understand the customer's business, which can take weeks or even months.

The following list of business processes can help partners ensure that their customer is ready to implement the proposed solution, and effectively use it over the long term.



ST
EP 01

PREPARE YOUR ORGANIZATION



IDENTIFY THE VISION OF YOUR BUSINESS

A partner will only be able to provide an effective solution for their customer if they thoroughly understand the customer's business vision. The customer must have a clear understanding of the vision of their business in terms of objectives, scalability, and short term goals. The business can have multiple visions, all working toward the same goal.

SET PRIORITY LEVELS FOR YOUR GOALS

Both short and long-term goals should be categorized based on priority. Each accomplished goal will contribute toward achieving the next. The short-term goals can be set every few months based on the progress made in line with the long-term goals.

SET OPTIMUM PRIORITY LEVELS FOR YOUR VISION

As the customer sets out the vision for their business, they should be able to prioritize each of their visions to establish a logical order for achieving them.

IDENTIFY YOUR BUSINESS GOALS

In addition to identifying their business vision, the customer will also need to identify their business goals, both **short-term** and **long-term**. Business goals are more focused than the business vision and help both the customer and partner define and identify specific tasks and role hierarchies. A business can have multiple business goals, and they should be separated into short-term (0-1 year) and long-term (1-5 years) goals.

Identifying pain points is critical for any business. Once the pain points are identified, it becomes easier to address them.

IDENTIFY THE PAIN POINTS IN YOUR BUSINESS

IDENTIFY SOLUTIONS FOR EACH PAIN POINT

After the pain points have been identified, make a list of solutions to address them. You'll be most successful if the solutions you draft are well informed.

ASSIGN SPECIFIC TEAMS FOR EACH PAIN POINT

Each identified pain point will require a different approach and different levels of expertise. Keeping this in mind, make sure to assign each pain point to a specific team, so that each team can focus their attention. Assigning different types of problem to the same team will divide their focus and take more time to arrive at a solution.



In the process of preparing your organization, you will need to come up with a rollout plan. A rollout plan functions as a blueprint that you will produce before you begin a project. The rollout plan should include the project that you are about to undertake, the time you expect it to take, a price structure analysis, macro planning, and implementation phases.

DRAW A BLUEPRINT OF YOUR ROLLOUT PLAN

A visual aid is often more helpful than just words on paper. Once you have developed your rollout plan, draw a visual blueprint of the flow to follow. This will give you a clear understanding of the workflow and dependencies.

COME UP WITH A ROLLOUT PLAN

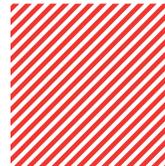


CHART AN OVERARCHING PROCESS FLOW

Once the blueprint of the rollout plan is ready, identify the individual process flows and chart an overarching workflow to include all the processes.

CHART SPECIFIC PROCESS FLOWS

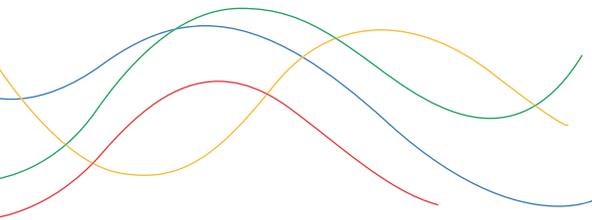
After you create the overarching workflow, chart a specific process flow for every type of flow in your business. For example, the sales reps will have a different process flow from the pre-support personnel. Create specific process flows for each role.

TRAIN YOUR EMPLOYEES

It is important that your employees not only have access to the technology they need, but also a substantial knowledge base. Train your employees so they are up to speed on the latest market trends and resources.

KEEP TABS ON MARKET TRENDS

Market trends are dynamic and it is important to keep track of how they change to ensure that your business keeps growing. Make adjustments to the way you approach the market and your customers based on current trends in the market.

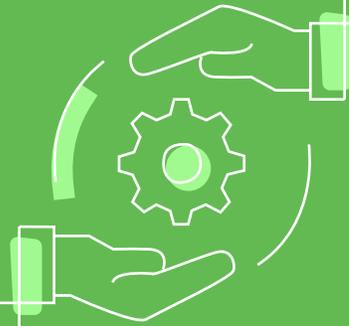


**“
IF YOU DEFINE THE
PROBLEM CORRECTLY,
YOU ALMOST HAVE
THE SOLUTION**

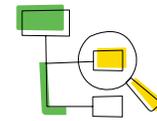
// STEVE JOBS

ST
EP 02

IMPLEMENT THE SOLUTIONS



Identify problem areas and divide them into categories



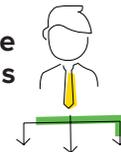
Implement solutions



Train your admins and employees



Assign defined role hierarchies and permissions



Follow-up on the progress



IDENTIFY PROBLEM AREAS

When you are ready to implement a solution, start by identifying problem areas to fix.

GROUP THE PROBLEMS INTO CATEGORIES

Once you have identified the problems, group them into categories. This will help you address them in a sequential, organized way. For example, your categories might include support, people management, and subscriptions.

DIVIDE THEM INTO SUBCATEGORIES

Once the problems are grouped into categories, further divide them into subcategories. This will help you to identify the exact problem area that needs to be addressed.

IDENTIFY SOLUTIONS TO THE PROBLEM AREAS

Find a specific solution for each problem category. The categorization will help you to identify the right solution for the nature of the problem that your business is facing. For example, support issues can be resolved with **Zoho Desk**, people management can be streamlined using **Zoho People**, etc.

IMPLEMENT THE SOLUTIONS

Now that you have identified and categorized the problems, implementing the solutions will be easier. You will have a clear understanding of your customer's business needs and which solutions to implement to get the best results.

Once the solutions have been implemented, the next step is to train the admins in the business organization. The admins should be given sufficient training that they have a thorough understanding of the solutions in place.

TRAIN YOUR ADMINS

ASSIGN ROLE HIERARCHY

While the admins in the customer's organization are receiving training, assign a strict role hierarchy to make sure the process flows work smoothly and efficiently.

ESTABLISH ROLES AND PERMISSIONS

Every employee in the organization will require a clear understanding of the nature of their job. Once the solutions are implemented, it is crucial to define roles, responsibilities, and permissions for everyone in the organization.

FREQUENT FOLLOW-UPS IN THE FIRST QUARTER

When new solutions are implemented, frequent, thorough follow-ups during the initial phase can help ensure that all processes are being followed smoothly and any gaps in the processes are addressed.

“DON'T FIND CUSTOMERS FOR YOUR PRODUCTS, FIND PRODUCTS FOR YOUR CUSTOMERS

// SETH GODIN

REASSIGN INCOMPLETE TASKS AND RESPONSIBILITIES

Over a few weeks, there are likely to be tasks and responsibilities that have either fallen through the cracks or were not completed in the given time frame. The best way to deal with this is to identify the incomplete tasks as soon as possible and reassign them for completion.

MONITOR PROGRESS

After the first month of implementation, make sure that you are monitoring the progress of every process flow and the overarching rollout plan. If you fail to do this, the partner and the customer will be unable to assess whether the implemented solution successfully fixed the issues that the business was facing before implementation. Monitoring progress should be a continuous process.



STEP 03

ENGAGE WITH YOUR EMPLOYEES

Empathetic employer's business will outperform by

202%

Engaged employees achieve

20%
more sales

Employee performance increases by

40%

Employee retention increases by

27%

Source - Gallup

UNDERSTAND YOUR EMPLOYEES' NEEDS

Implementing a solution is an important step to grow any business. Understanding the people who contribute to the growth of the business will help you to focus on growth. It is important for partners to convey this to their customers and foster a culture of listening to employees about their needs.

FOSTER HEALTHY CONVERSATIONS AND DISCUSSIONS

The partner must ensure that the customer they are working with understands the importance of a healthy work environment. Every business needs to foster productive conversations and discussions in the workplace. This will help the employees of the business with their own professional growth and also in building better working relationships.

SET UP PROPER COMMUNICATION

FLAWS Miscommunications are the root cause of many failed business operations. Before starting a new project, set up proper communications flows and channels, so that each employee can focus on their own job and also stay aware of the big picture.

SET UP PROPER INFORMATION FLOWS

In addition to communication flows, clear information flows are also important. Make sure that every member of a team involved in a specific project has access to all the information required for that project. This helps build team spirit and assists the team in working toward a common goal. Providing information only to a privileged few might make other team members feel alienated and unimportant.

Developing a regular training strategy should be high on your list of priorities. An effective training strategy will ensure that all your employees stay informed and up-to-date with the market trends and all new technologies adopted by your company.

DEVELOP A REGULAR TRAINING STRATEGY



CONDUCT IN-HOUSE WORKSHOPS AND TRAINING SESSIONS

This should be part of your training strategy. Spend some time and resources on conducting in-house workshops and training sessions for all your employees. A partner can play an active role in this area. The partner's expertise in the market and familiarity in the business is key to developing effective training materials.

KEEP TRACK OF EMPLOYEE PERFORMANCE

Tracking the performance of your employees is a smart move. It will tell you which areas of your business are struggling and give you an opportunity for improvement. However, it is important that your employees do not feel smothered or micro-managed. Keep the performance tracking positive and focus on supporting underperforming employees rather than criticizing them.

PROVIDE RELEVANT SOLUTIONS AND MOTIVATION

Motivated employees can be a key factor in the success of your company. An atmosphere of motivation should be maintained at all times, and any issue or escalation should be seen as an opportunity to provide helpful solutions.

“

100% OF CUSTOMERS ARE PEOPLE.

100% OF EMPLOYEES ARE PEOPLE.

IF YOU DON'T UNDERSTAND PEOPLE,
YOU DON'T UNDERSTAND BUSINESS.

// SIMON SINEK

CHART OUT KPIs

Carefully tracking your **KPIs (Key Performance Indicators)** is always a healthy practice for your business. Partners can provide more insight on this if a customer is struggling.

TAKE FEEDBACK

This is a delicate but necessary area. It is always good to encourage feedback from your employees and management. However, for this to work, feedback must be constructive and not personal.



**KEY
POINTS TO
REMEMBER**

Identify the pain points in
your business

Come up with a rollout plan

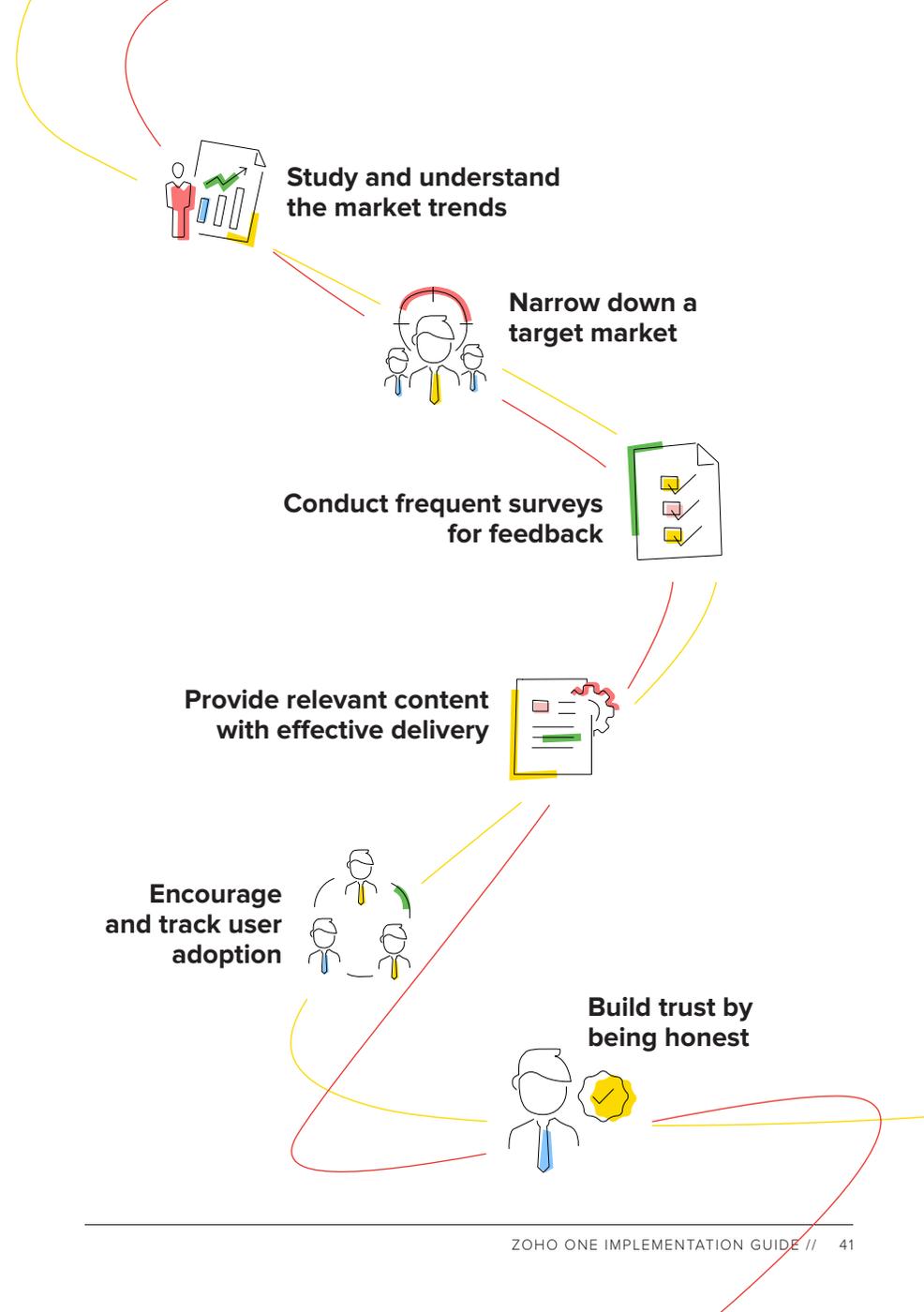
Train your admins

Develop a regular training
strategy



STEP 04

INTERACT WITH YOUR CUSTOMERS



STUDY THE MARKET

Studying the market for current trends and keeping your business in line with them can be an incredibly daunting task, but it is key to maintaining organic growth. Partners can help their customers achieve this.

UNDERSTAND THE MARKET TRENDS

To survive in the market as an independent business, you need to connect with your customers. A partner should talk to the customers they are working with regularly to develop a strong working relationship and help them understand market trends and how they impact their business.

NARROW DOWN YOUR TARGET MARKET

Business and market trends are dynamic. While it is a good idea to follow market trends within your business, it can be difficult to keep up as they change. A solution to this problem is to select an ideal target market and target audience for your business. This will help you focus on a particular segment and tailor your business accordingly.

Conducting surveys is one of the simplest but most effective ways to collect customer feedback and reviews. A survey is only as effective as the questions it consists of. Make sure to keep your questions clear and concise. We also recommend including a comment section at the end of the survey.

CONDUCT FREQUENT SURVEYS



IMPROVE AND CUSTOMIZE YOUR SOLUTIONS

It is important to use the customer feedback you collect to improve and customize your solutions. Partners can help their customers devise appropriate market-ready solutions.

ADDRESS CUSTOMER ISSUES

It is also crucial to address the issues that your customers report. Addressing customer issues is one of the best ways to improve trust and build a positive brand image.

DEVELOP A TRAINING STRATEGY

Developing a training module and strategy to educate your customers may provide long-term benefits for your business, not only strengthening your brand image, but also broadening your customer base.

PROVIDE RELEVANT CONTENT

A poorly executed training course or a badly written training content can do more harm than good. Provide content, training, and marketing material which are relevant to your customers and which they will be able to understand.

EFFECTIVE DELIVERY

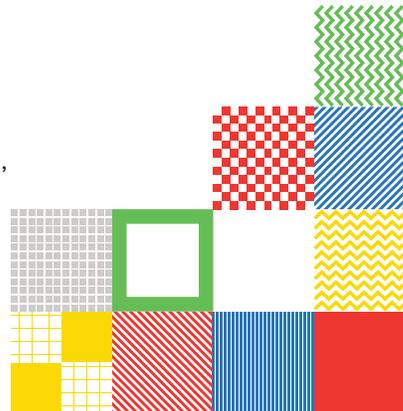
Researching the most effective way of delivering training and content to your customers is a good investment of time. Make sure not to cram your training sessions with too much information. Keep them focused and concentrate on delivering the content effectively. Conduct frequent workshops, trainings, and roadshows, targeting various market segments.

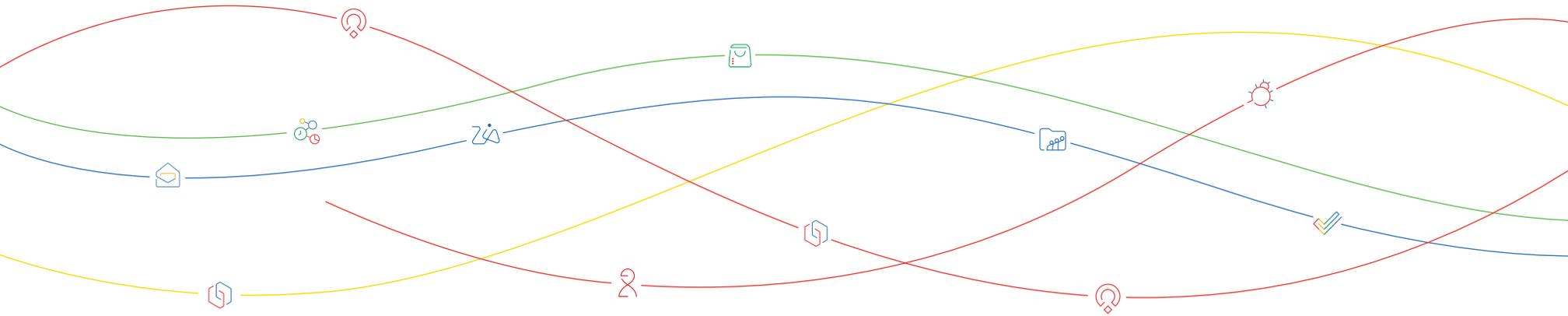
PROVIDE EXCELLENT SUPPORT

Customer stickiness is key to maintaining profitability. In addition to drawing in new customers, it is also important to retain your existing customers. More often than not, if you provide the best support, your customers will stick around. A good, proactive support staff will really help you increase customer stickiness.

ENCOURAGE USER ADOPTION

When done right, user adoption can be advantageous for your business. Research the ways you can approach this and settle for one which works for your business and your target market. Generally speaking, there are three methods of user adoption: **big-bang adoption, parallel adoption, and phased adoption.** The best mode of adoption may differ between customers.





TRACK THE ADOPTION

Deciding on the type of user adoption to follow is just the tip of the iceberg. Tracking adoption is a much bigger task. Primarily, user adoption should indicate concrete solutions to specific problems. Unless you track adoption, you will never know whether you were able to deliver what you had promised. User adoption is a process, rather than a one-time solution. It may take a few alterations and customizations to get the desired result.

BE HONEST AND BUILD TRUST

Honesty in business is by far the most neglected feature. Be honest with your customers about the vision of your business and how you approach real-world problems. This might not directly bring your business any added profits, but it will take you a long way in building trust with both prospective and existing customers.



“

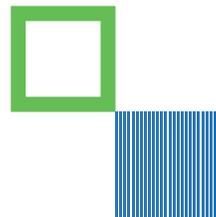
**LOOK FOR 3 THINGS
IN A PERSON**

**INTELLIGENCE, ENERGY
AND INTEGRITY**

**IF THEY DON'T HAVE THE
LAST ONE,**

**DON'T EVEN BOTHER WITH
THE FIRST TWO.**

// **WARREN BUFFET**

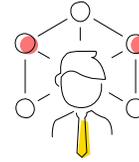




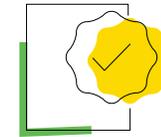
STEP 05

BUILD A STRONG CHANNEL

Build a customer engagement community



Never compromise on the quality of products and solutions



Keep your customers informed



**BUILD
A STRONG
BASE OF
LOYAL
CUSTOMERS**

Loyal customers are hard to find and even harder to retain. Channel your resources toward building a strong network of customers who have faith in your brand. Build a strong community of customers and retain as many of them as possible. One of the best ways to achieve this is to have a dedicated customer satisfaction team, who track customer retention and adoption.

**CONTINUOUS
CUSTOMER
ENGAGEMENT**

This falls under the umbrella of building a strong community of customers. Continuous customer engagement will help your business to improve customer relationships. Regular community meet-ups are a great way to touch base with your customers.

Do not compromise on the quality of the solutions that you provide to your customers. Maintain stability when it comes to quality.

**KEEP AN EYE
ON QUALITY**

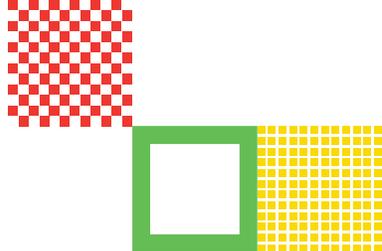
“

**ALWAYS MAKE
PRODUCTS THAT ARE
THE BEST IN THE WORLD
AND ANYTHING OTHER
THAN THIS IS A RECIPE
FOR MEDIOCRITY.**

// **SRIDHAR VEMBU**

**KEEP YOUR
CUSTOMERS
UPDATED**

Tell your customers about every new feature and milestone that your organization achieves. This will make them feel acknowledged and will strengthen the faith that they have in your brand.



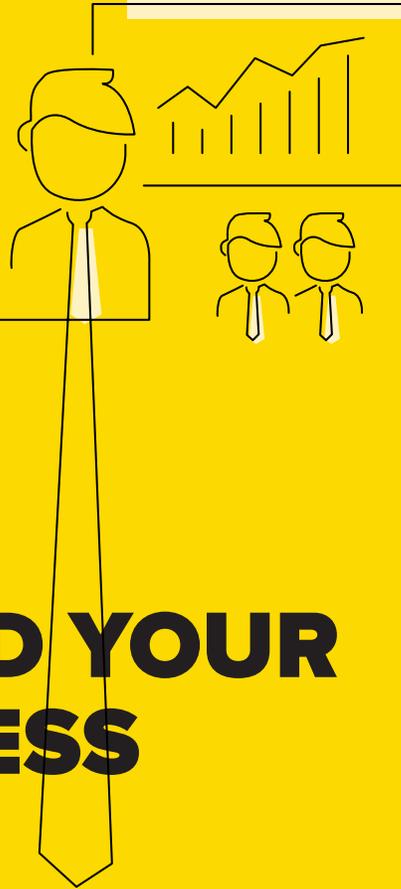
**KEY
POINTS TO
REMEMBER**

Conduct frequent
surveys

Keep an eye on
quality

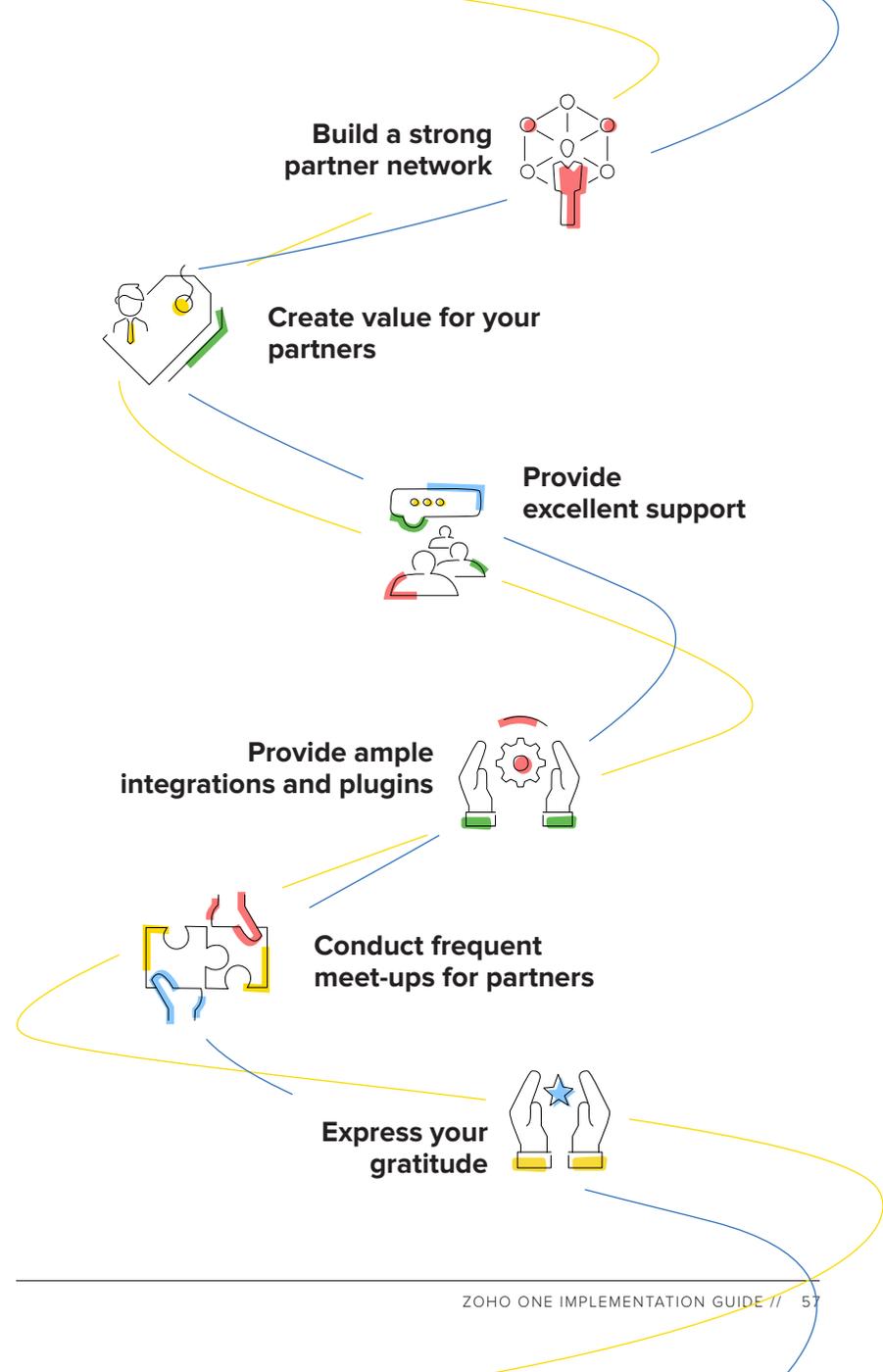
Be honest and
build trust

**JUST ONE MORE
STEP TO GO...**



**ST
EP 06**

EXTEND YOUR BUSINESS



BUILD A STRONG PARTNER NETWORK

As your business starts to grow, you should build a strong network not just of customers, but also of partners. Your partners in business are like your family. Include them in everything that you do and be honest with them. Partners are the face of your brand and allow your business to thrive through multiple channels. Make sure that your partners are on board with the ideals of your brand as a whole.

Building a partner community is not easy. Continuously strive to create value for your partners.

Give them something to look forward to and keep them constantly engaged. This cannot be achieved in a day. Look at it as an ongoing process and be prepared to work toward building a strong, organic network.

Encourage partners with value propositions rather than just commissions and profits.

CREATE VALUE

KEEP PRODUCING CONTENT

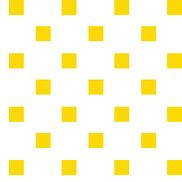
Have a dedicated team that works with partners and releases new and updated content regularly to share with them. Focus on the quality and relevance of the content rather than quantity.

PROVIDE EXCELLENT SUPPORT TO YOUR PARTNERS

Always be there for your partner. Your relationship with your partner is based on trust and conviction. It is important that your partners believe in you and know they can rely on your support. If possible, have a dedicated team for your partners.

PROVIDE ADDITIONAL PLUGINS AND INTEGRATIONS

A partner will push the capabilities of your products to their limits and make sure that there are no gaps or redundancies in them. Stay in constant contact with your partners and build plugins and integrations for them if required. Encourage them to include additional functions in their existing products.



CONDUCT FREQUENT MEET-UPS

Meet your partners as often as you can and conduct frequent partner-specific meet-ups. Continuously address partner issues and provide relevant solutions to their problems. Invite regular feedback and suggestions from them and keep them updated on your progress.

EXPRESS YOUR GRATITUDE



Making your partners feel acknowledged and valuable helps you earn their trust. Be sure to express your gratitude to your partner community.

“

**GOOD IDEAS
ARE ALWAYS
CRAZY UNTIL
THEY'RE NOT**

// **ELON MUSK**

**REFRESH
YOUR
MEMORY**

Identify the pain points in
your business

Train your admins

Develop a regular training
strategy

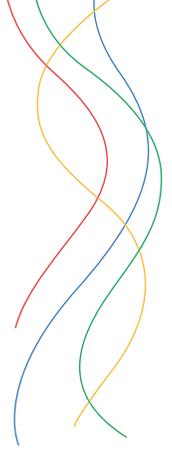
Conduct frequent surveys

Keep an eye on quality

Create value

Be honest and build trust

Express your gratitude



Change is everything that you need to grow. It requires dedication, hard-work and patience. Once you learn to master the art of riding the wave of change, you begin to lead the change. Our partners have seen us through many phases of change.

**WE LOOK
FORWARD
TO LEADING
THE CHANGE,
TOGETHER.**

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This **Implementation Guide** aims to provide a categorized blueprint for partners, who can use it to successfully implement Zoho One for their customers.

This guide is not a step by step instruction on how to set-up Zoho One. It is much more than a help guide or set-up guide. This guide will cover everything from aiding a partner in preparing a customer's organization before implementing a solution to long-term support for a business.