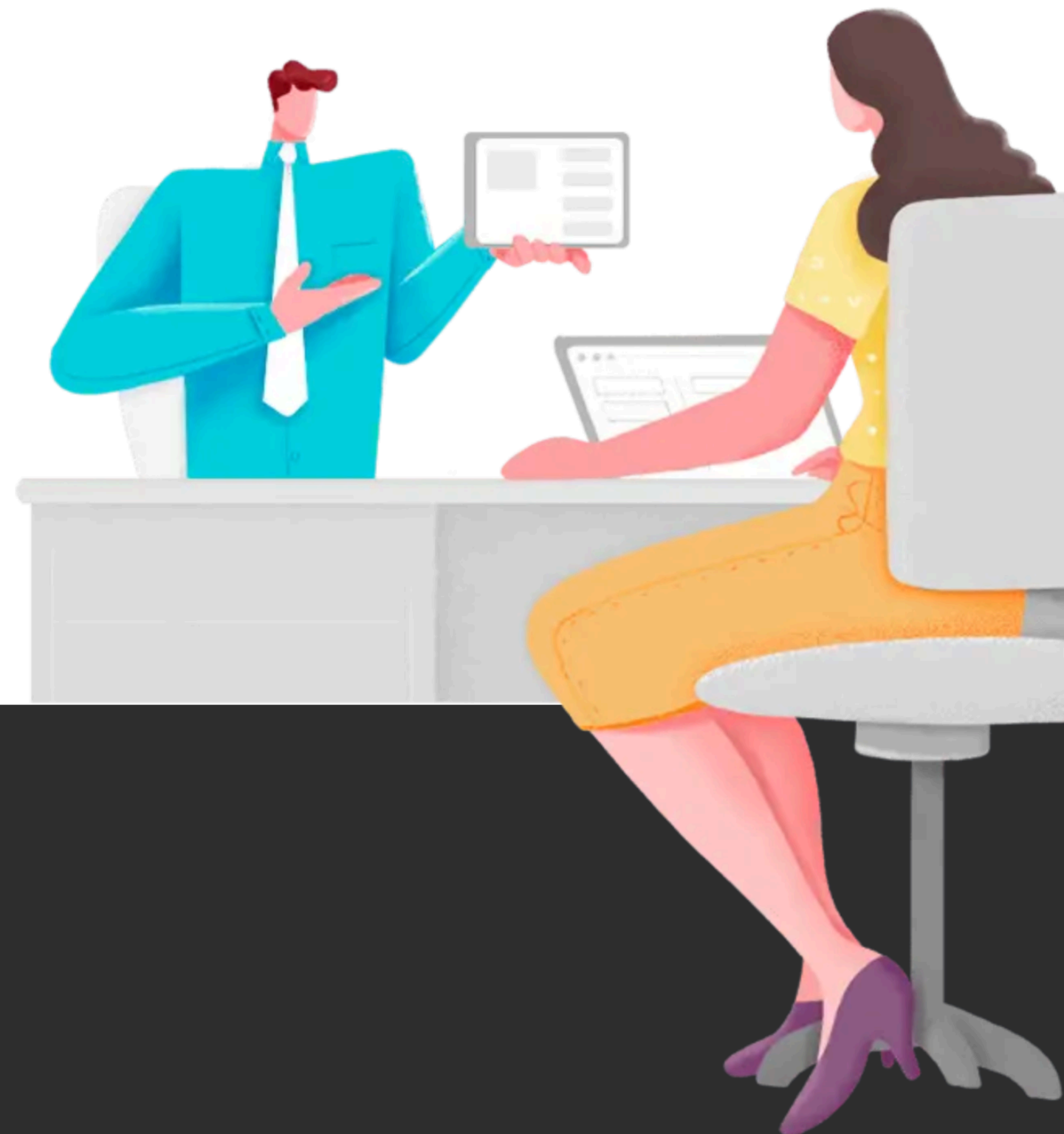




Zoho CRM vs Salesforce

COMPARISON DOCUMENT



****Disclaimer****

- The information provided in this CRM comparison sheet is intended to be a helpful, informative resource. It is based on publicly available data and is not intended to endorse or criticize any particular product or service.
- While every effort has been made to ensure the accuracy of the information presented, we cannot guarantee its completeness or applicability to your specific business needs. The features and capabilities of CRM systems can vary greatly, and some may have been updated or changed since the time of our research.
- We recommend conducting your own due diligence and consulting with a CRM specialist or vendor directly before making any purchasing decisions. We are not responsible for any decisions made based on the information provided in this comparison sheet.

What is Zoho CRM?

Zoho CRM is an award winning CRM which is trusted by a global network of over 250,000 businesses in 180 countries to help them convert more leads, engage with customers, and grow their revenue.

Zoho CRM is not just different, it's better.

Zoho CRM's bottom-up approach—starting with serving the mid-market and steadily growing to now serve enterprise markets as well—has enabled us to carry forward our intuitive UI and user friendly experiences while still delivering all the in-depth functions needed by larger enterprises. Both CRM power users and people new to CRM software can be onboarded quickly to start using the platform effectively.

USP for Zoho CRM

- User friendly and easy to use
- Powerful enterprise level functionality
- Low learning curve for people who are not used to a CRM
- Consistent interface and user design (unlike Salesforce, which juggles between Lightning and Classic)
- Extensive customization options are available, but not mandatory

Why do customers like Zoho CRM?

Zoho CRM—with its broad coverage, deep features, and intuitive UI—can go head to head against any other big brand name when it comes to technology and functionality. For the last 15 years, Zoho CRM has invested extensively in product R&D, resulting in a mature, enterprise-grade software solution. While other companies have spent their earnings to continuously promote their products, we've invested the majority of our profits in the core principles of software development, deepening our CRM feature set as well as leveraging functionality from the larger Zoho ecosystem. This truly robust offering empowers our customers to flexibly scale and adapt as they react to an evolving global market.

Salesforce Sales Cloud

Salesforce approached the CRM market with a top-down ideology and built their solution enterprises in mind from the beginning. They have more recently started to provide SME-oriented solutions. As a result, the end user experience is often disjointed. For example, the user has to constantly switch between the old interface and the new Lightning interface to do their job. The user interface is overloaded, lacks the modern touch users have come to expect of SaaS programs, and requires a lot of customization to use it effectively. You can only make the most out of Salesforce if you have a dedicated implementation team in your organization.

The comparison, in a nutshell

We've compared the Professional, Enterprise, and Ultimate editions of Zoho CRM with the Professional, Enterprise, and Unlimited editions of Salesforce Sales Cloud along the following parameters: [Lead Management](#), [Omnichannel Communication](#), [Process and Journey Orchestration](#), [Automation](#), [Sales Enablement](#), [Analytics](#), [Performance Management](#), [Sales Intelligence](#), [Customization](#), [Marketing Automation](#), [Team Collaboration](#), [User Experience and Interface](#), [Mobility](#), [Security](#), and [Developer Platform](#).

Here's a summary of the capabilities of the two products.

Zoho CRM			Salesforce Sales Cloud			Distinguishing capabilities		Distinguishing capabilities	
Pricing Plan			Pricing Plan			Process Management (Blueprint)		Lightning Flow + Process Builder	
Billed	Billed		Billed	Billed	Journey Management (Command Center)		Unlimited Dashboard		
Annually	Monthly		Annually	Monthly	UI Design Studio (Canvas)		Customizations		
Free	\$0	\$0	Starter Suite	\$24	-	Prediction Builder (Zia)		AppExchange	
Standard	\$14	\$20	Professional	\$80	-	Customers		Customers	
Professional	\$23	\$35	Enterprise	\$165	-	AbuDhabi Aviation, Bose, BlueStar		Philips, Whitehat Jr, Echo	
Enterprise	\$40	\$50	Ultimate	\$330	-	Support		Support	
Ultimate	\$52	\$65				Phone		Phone	
Agent Limit			Agent Limit			Chat		Chat	
Pay for each license			Pay for each license			Email		Email	
Trial Period			Trial Period			Platforms Supported		Platforms Supported	
15 days			30 days			iOS		iOS	
						Android		Android	
						Web		Web	

*All information in the document is based on publicly available data.

Lead and Deal Management

Sales force automation software for enhanced sales productivity



From initial contact to the final sale, your prospect goes through a number of interactions with various different teams in your business. A CRM solution compartmentalizes these sequences, provides contextual information for every interaction, and seamlessly connects them results in shorter sales cycles, as well as helping your business build longer lasting relationships with your customers.

Zoho CRM

Zoho CRM offers a comprehensive set of tools to help businesses capture leads, automate lead scoring, identify leads that will convert, and follow up with detailed contact information.. For sales reps on the move, the Zoho CRM mobile app comes with business card scanning, voice-to-text notes and many other handy features to help capture and track lead information in the field.

USP for Zoho CRM

- Kanban view: See all your leads and deals organized according to their stages in the pipeline. Drag and drop a deal to change its stage with ease.
- Webform analytics and A/B testing: Analyze your webforms' performance and improve your lead generation capabilities through A/B testing.
- Zia lead assignment suggestion: Assign records to the most qualified rep based on their history of handling similar tasks.
- Card Scanner: Scan a business card or QR code and convert it as a contact / lead in Zoho CRM.

Salesforce Sales Cloud

Salesforce's lead management functionality gives you the basic tools to capture, qualify, and nurture leads. The activity timeline lets you see updated contact information. You can build sales processes using the process builder, set up automatic lead scoring and routing to ensure leads never fall through the cracks, and that the right sales reps follow up on leads while they're hot. You can also import leads from CSV files and map them to fields in the system.

But, Salesforce fails to deliver on some of the basics of lead management, with no built-in card scanner and only a bare bones web-to-lead capture functionality.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Leads and Contacts	✓	✓	✓	✓	✓	✓	✓	✓
Accounts and Deals	✓	✓	✓	✓	✓	✓	✓	✓
Deal Stages	✓	✓	✓	✓	✓	✓	✓	✓
Tasks, events call log, notes	✓	✓	✓	✓	✓	✓	✓	✓
Multiple Pipeline Management	✓		✓		✓	✓	✓	✓
Multiple Currencies	✓		✓	✓	✓	✓	✓	✓
CRM views	✓	✓	✓	✓	✓	✓	✓	✓
Advanced filters	✓	✓	✓	✓	✓	✓	✓	✓
Reminders	✓	✓	✓	✓	✓	✓	✓	✓
Contextual Custom related lists		✓	✓	✓	✓	✓	✓	✓
SalesSignals			✓		✓		✓	
Custom Signals			✓		✓		✓	

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Sales Forecasting	✓		✓	✓	✓	✓	✓	✓
Web-to-lead form	✓	✓	✓	✓	✓	✓	✓	✓
Web-to-contact form	✓		✓		✓		✓	
Web-to-case form			✓	✓	✓	✓	✓	✓
Cases		✓	✓	✓	✓	✓	✓	✓
Solutions			✓		✓		✓	
Webform AB testing					✓		✓	

*All information in the document is based on publicly available data.

Omnichannel communication

Multiple channels, one platform for communication



Reaching customers where they are is necessary to enable meaningful interaction. CRMs which offer omnichannel communication support are no longer a luxury but are now required for creating a positive customer experience as well as centralize your customer information. We will be looking at email, telephony, live chat, and social media to compare how Salesforce Sales Cloud and Zoho CRM handle omnichannel communication

Zoho CRM

Zoho CRM allows you to connect with your customers through multiple channels with access to centralized information that empowers your sales team to have contextual, meaningful conversations. Bundled live chat and social media integrations help you proactively connect with prospects on your website and social media platforms. Zoho CRM has pre-built integrations with 100+ PBX providers around the world as part of the Zoho PhoneBridge platform.

USP for Zoho CRM:

- SalesInbox: Organize your messages according to your CRM pipeline, so you can stay on top of your most important deals. Drag and drop emails across the columns to add contacts or create deals.
- Auto-generate leads from social media: Set up triggers to add leads and contacts from social media automatically based on their interactions with your brand.
- Built-in Whatsapp Integration: Respond to your customers right away via Whatsapp text messaging.

Salesforce Sales Cloud

Salesforce Sales Cloud integrates with Outlook and Gmail giving sales reps the power to sync information directly to CRM from their inbox. Salesforce Sales Cloud allows sales reps to use in-product telephony through Lightning Dialer, their native softphone dialer functionality, or with the integrations with PBX services available in their marketplace.

- Salesforce Sales Cloud does not offer native live chat capabilities and requires you to buy Digital Engagement SKU to engage in live chat.
- In order to respond to social posts, monitor customer social activity, connect multiple social accounts, analyze social media reports you need to purchase the Social Studio Plugin.
- If you are looking for LinkedIn integration in particular, you need to again purchase the LinkedIn Sales Navigator from App Exchange - which in contrast, is free in Zoho CRM.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
SalesInbox	✓		✓		✓		✓	
BCC Dropbox for mails			✓		✓		✓	
Email Insights	✓	✓	✓	✓	✓	✓	✓	✓
Email Parser					✓		✓	
Email association with deals		✓	✓	✓	✓	✓	✓	✓
Email templates	✓	✓	✓	✓	✓	✓	✓	✓
Schedule mails	✓	✓	✓	✓	✓	✓	✓	✓
Mass emails	✓	Limited	✓	Limited	✓	Limited	✓	Limited
Telephony and PBX*	✓		✓	\$	✓	\$	✓	\$
Automatic call logging			✓	\$	✓	\$	✓	\$
Enrich data from Twitter	✓		✓	\$	✓	\$	✓	\$
Enrich data from Facebook	✓		✓	\$	✓	\$	✓	\$

*Need to purchase Salesforce Sales Dealer starting at \$5

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Social module	✓		✓	\$	✓	\$	✓	\$
Automated social lead generation	✓	✓	✓	\$	✓	\$	✓	\$
Live chat	✓	✓	✓	\$	✓	\$	✓	\$
Live chat reports	✓	✓	✓	\$	✓	\$	✓	\$
Online meetings	✓		✓	\$	✓	\$	✓	\$
Whatsapp integration			✓	Third party	✓	Third party	✓	✓

*All information in the document is based on publicly available data.

Automation

Automate. Be Productive



The ability to automate everything from field updates and task creation, to fully automating different large scale processes across your sales operation is at the heart of every SFA tool. Automation helps decrease the amount of grunt work and data entry handled by sales reps, so they can focus more on prospecting, engaging buyers, and closing deals.

Zoho CRM

You can automate regular sales routines with Workflows in Zoho CRM. The drag-and-drop builder and the intuitive UI makes it easier to visualize, construct, and edit workflows according to your needs.

Workflows in Zoho CRM are synchronous with the execution of custom functions, which are asynchronous, and tasks requiring on-demand automation, which are handled by Macros. At the click of a button, macros execute multiple actions on one or multiple records such as updating a field, sending an email, or creating a new task.

USP for Zoho CRM

- Validation Rules: Define the accuracy and validity of the data that enters your CRM. If a record matches the criteria defined in the rule, CRM will throw an alert and will not allow the record to be saved.
- Macros: With a single click, Macros can send an email simultaneously, update a record, or create a task. You can combine multiple actions in a single macro and apply them to a whole batch of records at the same time.
- Assignment Rules: Automate the lead assignment process by defining rules based on which leads are assigned to a set of reps

Salesforce Sales Cloud

You can use Workflow Rules to send email alerts, assign tasks, and update fields when certain requirements are met. However, we found the overall workflow builder interface to be outdated and non-intuitive.

Another important feature we found missing from Salesforce was Macros. Macros enable a user to send emails, create tasks, and update a field in all the records with a specified value at the click of a button. Macros are available in all editions in Zoho CRM.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Workflow rules	✓		✓	✓	✓	✓	✓	✓
Assignment rules	✓	✓	✓	✓	✓	✓	✓	✓
Approval process			✓	✓	✓	✓	✓	✓
Schedules					✓	✓	✓	✓
Review process			✓		✓		✓	
Escalation rules	✓		✓	✓	✓	✓	✓	✓
Validation rules	✓		✓	✓	✓	✓	✓	✓
Macros		✓	✓	✓	✓	✓	✓	✓
Email parser			✓		✓		✓	
Lead scoring	✓		✓		✓	✓	✓	✓
Webhooks	✓	✓	✓	✓	✓	✓	✓	✓

*All information in the document is based on publicly available data.

Process and Journey Management

Build your sales team's roadmap to success



A successful business is always the result of the right combination of dedicated employees and well-thought-out processes. However, a great process is no use if it can't be replicated and automated in your business applications. Your CRM should help you build, automate, and get the most out of all your sales processes, whether they are simple or complex, from standardized processes to complete end-to-end customer journeys.

Zoho CRM

Your organization might have several different sales processes in place—like deal closure, lead follow-up, order management, or your discount process. Blueprints in Zoho CRM help you build scalable and repeatable sales processes. You can visually design your sales process with an easy-to-use drag-and-drop builder. Take it even further and build complex workflows across the entire customer journey using CommandCenter.

Salesforce Sales Cloud

Salesforce Process Builder and Flow allow you to automate different parts of your sales process. You can use the drag-and-drop visual Process Builder to automate activities such as creating tasks, creating or updating records, submitting records for approval, and sending emails. You can also schedule actions to be executed when a certain condition is satisfied.

USP for Zoho CRM

- CommandCenter: Build complex journeys and iterate them based on different scenarios, user actions, or traits. Build in automated workflows to reduce manual intervention.
- Third-party app functions: Easily connect with third-party applications while building your customer journey. Third-party app activity can trigger specific actions, or vice versa.
- Analyze customer journeys: Track how long each of your customer journey's individual stages take to help identify bottlenecks and loopholes. Create multiple versions of each customer journey and compare their performance to identify the best one.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Blueprints			✓	✓	✓	✓	✓	✓
Active Processes			✓	✓	✓	✓	✓	✓
Journey Builder				✓	✓	✓	✓	✓
Pathfinder				✓	✓	✓	✓	✓
Sales Process Analytics				✓	✓	✓	✓	✓

Suggested links

- Interested to know how you can build detailed sales processes for your organization with Zoho CRM's Blueprint? Please click [here](#).
- Interested to know how you can build personalized customer journeys with Zoho CRM's Command Center? Please click [here](#).

Remote Readiness

Communicate, collaborate, and sell from anywhere



Today's sales teams need to communicate, collaborate, and do their best work from anywhere – not just from the office. From building teams to running meetings and events, businesses of all types and sizes are increasingly moving large portions of their business processes online. Your CRM should enable you to work with a remote workforce, put together flexible work policies and set up digital spaces to collaborate.

Zoho CRM

Zoho CRM allows you to conduct sales presentations, training webinars, and meetings, right from your CRM. Telephony and PBX integrations allow salespeople to have conversations with your prospects away from office. With the free Zoho Cliq integration, you can create channels in Cliq to brainstorm, discuss sales strategies, and share information from Zoho CRM.

USP for Zoho CRM

- Conduct meetings and presentations - Zoho CRM integrates with a wide range of popular web meeting and conferencing applications like GoToMeeting, TeamViewer, Zoom, Cisco WebEx and Zoho Meeting
- Mobile apps - Zoho CRM's mobile app makes it easy to access data from anywhere, at any time. Add and modify customer information in real time, even when you're offline.
- Zoho CRM offers Analytics Mobile Studio - an industry first android/iOS app which lets you make data driven decisions on the go.
- Video Collaboration with Cliq - Make decisions faster together with audio and video calls. Get on a video call directly from the chat window and share your screen.

Salesforce Sales Cloud

Salesforce Sales Cloud remote sales functionality requires you to buy additional modules such as Salesforce Meetings, Enhanced High Velocity Sales and Einstein Video Call Coaching. Apart from this, Salesforce integrates with online conferencing tools such as Zoom and GoToMeeting - but unfortunately, it is available only in Professional editions and above. The AppExchange store also lacks the much needed Microsoft Teams integration.

Customization

Make your CRM truly yours



The benefits a CRM brings to an organization greatly depends on how much it can be tailored to fit the needs and use cases of the organization. The CRM should be able to acclimatize to the way your organization works, not the other way around. A truly customizable solution can be modified as needed to fit your business.

Zoho CRM

The bottom-up approach toward customization in Zoho CRM and wide array of out-of-the-box customization options makes it easy to retrofit according to your sales team's needs. You can customize page layouts and which modules that are displayed to each user, create custom modules, and configure dynamic layouts that change based on field entry, all without technical expertise or hiring implementation specialists.

USP for Zoho CRM

- Canvas: This feature allows you to customize CRM record design. This drag-and-drop builder lets you sculpt your records to match your business' requirements. This feature provides a host of elements such as images, custom action buttons and fields that let you completely refurbish how your CRM records look.
- Custom Buttons: This is another unique feature that Zoho CRM offers that enables your sales reps to perform bespoke actions with just a click of a button.
- Picklist history tracking is an industry first feature which lets you track of the field updates(such as lead stage or deal stage) so that you don't miss out any vital information

Salesforce Sales Cloud

While Sales Cloud offers most of the same customization features as Zoho CRM, configuring them is not as straightforward and requires you to hire a Salesforce developer.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Page customization	✓	✓	✓	✓	✓	✓	✓	✓
Rename modules	✓	✓	✓	✓	✓	✓	✓	✓
Tab groups			✓	✓	✓	✓	✓	✓
Page layouts				✓	✓	✓	✓	✓
Layout rules				✓	✓	✓	✓	✓
Validation rules	✓		✓	✓	✓	✓	✓	✓
Web tabs					✓		✓	
Sub forms		?		?	✓	?	✓	?
Translations			✓		✓		✓	
Custom fields	✓	✓	✓	✓	✓	✓	✓	✓
Custom modules				✓	✓	✓	✓	✓

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Custom buttons				?	✓	?	✓	?
Custom list views	✓	✓	✓	✓	✓	✓	✓	✓
No-code Design Platform	Canvas		Canvas		Canvas		Canvas	
Picklist history tracking					✓		✓	
Business hours	✓	✓	✓	✓	✓	✓	✓	✓
Sandbox					✓	\$	✓	\$
User portals					✓	\$	✓	\$

*All information in the document is based on publicly available data.

Analytics and Reporting

Make data-driven decisions



A CRM is a big repository of information and without a comprehensive range of analytics, this information will not only become overwhelming, but you will also fail to identify important patterns in your business that require your attention. Ensure that your CRM enables you to monitor all key data points to make data-driven business decisions and stay ahead of your competition using actionable insights.

Zoho CRM

Zoho CRM comes with a host of prebuilt dashboards and reports and the ability to schedule reports. KPIs, Funnels, Target Meters, Zone Charts, and Comparators are analytics components you can add to your dashboard that provide in-depth analysis of leads and sales reps' performance. Inbuilt and customizable reports blend your CRM data in multiple ways to understand the underlying trends. Bring together CRM data from leads, contacts, campaigns, tasks, vendors, quotes, and much more.

USP for Zoho CRM

- Quadrant: This unique component for analytics can help you analyze multiple data points together and pinpoint focus on certain areas.
- Workflow reports is an industry first feature which lets you know how many times a workflow rule has been used.
- Zoho Analytics: Bundled with Zoho CRM Ultimate edition, Zoho Analytics is a fully-fledged BI solution which lets you connect data from multiple sources, manipulate and analyze your data to create stunning data visualizations, and discover hidden insights.

Salesforce Sales Cloud

One of the most confusing aspects of Sales Cloud is that you cannot create an analytics component, such as a comparator, without first creating a report. This makes it more time-consuming to create comprehensive analytics components. In addition having a less intuitive analytics UI than Zoho CRM, Sales Cloud also falls short when it comes to prebuilt reports, making it difficult to get a good overview of your business's sales process.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Standard reports	✓	✓	✓	✓	✓	✓	✓	✓
Custom reports	✓	✓	✓	✓	✓	✓	✓	✓
Schedule reports	✓	✓	✓	✓	✓	✓	✓	✓
Charts	✓	✓	✓	✓	✓	✓	✓	✓
KPIs	✓	✓	✓	✓	✓	✓	✓	✓
Funnels	✓	✓	✓	✓	✓	✓	✓	✓
Target meters	✓	✓	✓	✓	✓	✓	✓	✓
Comparators			✓	✓	✓	✓	✓	✓
Cohorts					✓		✓	
Quadrants					✓		✓	
Zones					✓		✓	
Anomaly detectors (Powered by Zia)					✓	Einstein add-on	✓	Einstein add-on

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Standard dashboards	✓	✓	✓	✓	✓	✓	✓	✓
Custom dashboards	✓	✓	✓	✓	✓	✓	✓	✓
Webform analytics					✓		✓	
Webform A/B Testing					✓		✓	
Analytics mobile app	✓		✓		✓		✓	
Workflow reports					✓		✓	

*All information in the document is based on publicly available data.

Sales Intelligence - Zia

Leverage AI to help with the heavylifting



Once considered a luxury, Artificial Intelligence has now become a necessity for businesses to stay sharp, read between the lines, and ensure no sale slips through the cracks. When choosing a CRM, ensure your sales managers and reps are able to leverage the power of an intuitive, context-aware artificial intelligence assistant for everything from evaluating leads and assigning them to the most suitable rep, to helping your reps by taking notes for them.

Zoho CRM

Zoho CRM's AI enabled Sales Assistant Zia helps you identify the best leads, predict sales, detect anomalies, identify email sentiment, make upsell recommendations and automate mundane tasks. Zia even takes notes when you dictate so your sales reps don't have to go looking for a pen to note down something important about a lead or a key observation. Image validation and data enrichment are also other key features Zia performs.

USP for Zoho CRM

- Conversational assistant: You can either text or talk to Zia to pull dates, reports, charts, and even ask it to make changes in records. You can dictate notes or reminders.
- Anomaly detection: Zia detects and flags anomalies in your sales cycle so you're always on top of trends and able to act accordingly.
- Zia Prediction Builder: This toolkit enables administrators to build predictions such as the chance of winning a deal, growth, and expenditure and can forecast outcomes for both standard and custom modules.

Salesforce Sales Cloud

Like Zia, Einstein is also capable of lead scoring, automating mundane tasks, and predicting sales but there are no stand-out features to justify the price. The limitation of Einstein to certain components and the extensive customization it requires to perform certain pre-built tasks that Zia offers as standard are also a let down.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Lead conversion prediction					✓	Einstein add-on	✓	Einstein add-on
Deal conversion prediction					✓	Einstein add-on	✓	Einstein add-on
Data enrichment					✓		✓	
Zia Voice					✓		✓	
Zia reminder					✓	Einstein add-on	✓	Einstein add-on
Best time to contact					✓	Einstein add-on	✓	Einstein add-on
Macro suggestion					✓		✓	
Zia scoring					✓	Einstein add-on	✓	Einstein add-on
Prediction builder					✓	Einstein add-on	✓	Einstein add-on
Assignment suggestions					✓	Einstein add-on	✓	Einstein add-on
Workflow suggestions					✓	Einstein add-on	✓	Einstein add-on
Email intent/sentiment/emotion					✓		✓	
Call intent/sentiment/emotion					✓		✓	

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Call transcription					✓	Einstein add-on	✓	Einstein add-on
Next best experience					✓	?	✓	?
Voice of customer					✓	?	✓	?
Zia Vision					✓	?	✓	?
Churn prediction					✓	Einstein add-on	✓	Einstein add-on
Competitor alert					✓		✓	
Strategy influencer					✓		✓	
Recommendation analytics					✓	Einstein add-on	✓	Einstein add-on
Ask Zia					✓		✓	

*All information in the document is based on publicly available data.

Sales Enablement

Make selling easier for reps



The best way to motivate your sales reps is to provide them with the right sales tools that help them close faster. CRMs can often be business-centered and forget about the people who use them day-in and day-out. Ensure your sales reps have a comprehensive arsenal of tools that enable them to deal with lead requirements and the paperwork that comes with closing deals without having to toggle between applications.

Zoho CRM

Since Zoho CRM was built for businesses of all sizes, it comes with a comprehensive set of prebuilt sales enablement tools that enable sales reps to be a single point of contact for the customer from the beginning to end of a sale.

Zoho CRM's integration with the Zoho Finance Suite allows your sales representatives to instantly generate quotes, sales, or purchase orders from Zoho CRM. Grant your team access to expense, inventory, and subscription information from Zoho CRM to help them avoid the hassle of shuffling between different software applications.

USP for Zoho CRM:

- **Wizards:** This feature lets you divide a long form into a series of screens that collect information. This ensures your sales reps don't miss any key fields.
- **User Portals:** Give your customers partial access of your CRM with the User Portals function. Giving customers direct access to certain modules and some of the data associated with their records such as invoices and loyalty points frees up your sales reps from responding to common requests for basic information.
- **Calendar booking:** Calendar booking comes in handy for the customer to book a meeting almost instantly. It allows customers to see when the agents are available and enables them to schedule a meeting or call independently.

Salesforce Sales Cloud

Sales Cloud offers basic sales enablement features but you will need to find integrations if you want to handle sales quotes for products from your CRM. Some key functionalities that come bundled with Zoho CRM as standard are locked behind a paywall in Sales Cloud.

For example, in order to extend Salesforce's functionality to other aspects of your business like quote management, inventory management, or to manage back-end finances, you will need to purchase additional modules.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Price books			✓	✓	✓	✓	✓	✓
Sales quotes			✓	✓	✓	✓	✓	✓
Sales orders		✓	✓	✓	✓	✓	✓	✓
Folder sharing	✓	✓	✓	✓	✓	✓	✓	✓
Attach documents	✓	✓	✓	✓	✓	✓	✓	✓
File versioning	✓		✓		✓		✓	
Reviews	✓		✓	✓	✓	✓	✓	✓
Wizards					✓	✓	✓	✓
SalesInbox					✓		✓	

*All information in the document is based on publicly available data.

Marketing Automation

Bridge the sales-marketing divide



While a CRM is primarily designed to structure, streamline, and improve the sales functions of your business, it should also help you to perform another key function that drives sales: marketing. Running your marketing processes from the same ecosystem as your sales ensures the two functions stay connected. This will help you better target leads, engage prospects, and upsell to existing customers.

Zoho CRM

Zoho CRM allows you to run email marketing campaigns, map leads with the marketing campaigns that they were captured from, and even segment your customers so you can target them better. These marketing features are usually only available behind paywalls, but Zoho CRM allows you to perform simple marketing functions and build a better connection with your customer base at no extra cost.

USP for Zoho CRM

- Zoho CRM has an RFM (Recency, Frequency, Monetary) customer segmentation feature that helps you group and target your customer demographics.
- Google Adwords is available as a free integration. Adwords is one of the most commonly used lead generators and you can keep tabs on all your Adwords campaigns right from your CRM and identify the best performing ones and optimize accordingly.
- Surveys: You can engage with and receive feedback from your customers by sending surveys right from your CRM using the Zoho Survey integration.

Salesforce Sales Cloud

Salesforce Sales Cloud offers only bare bones marketing automation features out-of-the box. It can associate leads and contacts with campaigns, add notes, and update member statuses. Many key features such as the ability to send and lead nurturing or survey campaigns, and email and survey analytics are locked behind a paywall which can be upwards of \$2,000 a month, depending on your usage. Another useful feature, the Google Adwords Integration, which is free in Zoho CRM but has an additional cost in Sales Cloud. In short, you need to buy their Growth, Plus, or Advanced add-on plans in order to work with the most essential marketing automation features.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Email templates	✓	✓	✓	✓	✓	✓	✓	✓
Email opt-out	✓	✓	✓	✓	✓	✓	✓	✓
Mass email	✓	✓	✓	✓	✓	✓	✓	✓
Email relay			✓	✓	✓	✓	✓	✓
Email authentication	✓	?	✓	?	✓	?	✓	?
Marketing campaigns	✓	✓	✓	✓	✓	✓	✓	✓
Marketing attribution					✓		✓	
Customer segmentation		Limited		Limited	✓	Limited	✓	Limited
Auto response			✓	✓	✓	✓	✓	✓
Zoho CRM for Google Ads			✓	Limited	✓	Limited	✓	Limited
Zoho Survey integration	✓		✓		✓		✓	

*All information in the document is based on publicly available data.

Team Collaboration

Bridge knowledge gaps, bring your teams together and improve your bottom line.



Converting a lead into a recurring customer involves various stages and multiple teams working together. It's therefore imperative that your CRM system has all the necessary tools to enable better communication, provide visibility into the statuses of active tasks and projects, and improve overall productivity.

Zoho CRM

Zoho CRM is a collaborative CRM built to facilitate communication with your customers as well as your own teams. It enables teams to add helpful context to their sales records, helps them stay connected with real-time sales updates, and connects your collaboration tools so your team can share all their updates from one platform. Zoho CRM includes Zoho Cliq, a fully fledged Slack alternative which simplifies your team communication with organized conversations.

USPs for Zoho CRM

- Integration with Zoho Projects: Manage tasks effectively by creating projects and associating them with specific segments of customers in Zoho CRM.
- Feeds: A centralized hub to discuss strategy, share ideas and best practices, or celebrate big wins.
- Sales collaboration via chat: Integrate with popular communication tools like Zoho Cliq, Slack, and Microsoft Teams to share contextual CRM data with users or groups and get real-time alerts for key updates in Zoho CRM

Salesforce Sales Cloud

Salesforce offers a variety of team collaboration features with Chatter: a forum to share ideas and important updates, status updates and live feeds. But you'll discover that many necessary capabilities are dependent on integrations with external vendors. For example, if you want to schedule a meeting with a prospect or conduct a webinar, you'll have to integrate with Zoom Meeting or Zoom Webinar to do so. In those cases, you will need to have paid licenses for those external products as well.

Even if buying licenses for other collaboration products isn't a dealbreaker for you, you'll be disappointed to find out that Salesforce lacks a direct integration with Microsoft Teams, which is one of the most widely used collaboration software.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Gamescope	✓		✓		✓		✓	
Calendar	✓	✓	✓	✓	✓	✓	✓	✓
CalDAV sync	✓		✓		✓		✓	
Calendar booking	✓		✓		✓		✓	
Status updates	✓	✓	✓	✓	✓	✓	✓	✓
Direct messages	✓		✓		✓		✓	
Team feeds	✓		✓	✓	✓	✓	✓	✓
Attach files to feeds	✓		✓	✓	✓	✓	✓	✓
Groups for team collaboration	✓		✓	✓	✓	✓	✓	✓
Tagging	✓		✓	✓	✓	✓	✓	✓

*All information in the document is based on publicly available data.

Security and Privacy

Earn your customer's trust by taking a security-first approach



The success of a business depends on the trust that its customers place in it. Customers are now, more than ever, paying attention to how businesses maintain the integrity of the vast amount of information they possess. So keeping data secure and private has become just as important as great customer experience in ensuring a long-lasting customer relationship.

Zoho CRM

Zoho CRM keeps your data secure and allows you to track changes with powerful features such as MFA, Encryption At Rest (EAR), in-built IP restriction to control unauthorized access, and audit logs. You can also sync with Active Directory to enforce company policies like password management, session management, and more. Zoho CRM is also compliant with certifications such as ISO/IEC 27001, ISO/IEC 27701, ISO/IEC 27017, ISO/IEC 27018, ISO 9001, ISO/IEC 20000, GDPR, CSA, CCPA, PCI, TRUSTe, SignalSpam, SOC 1, 2 and HIPAA.

USPs for Zoho CRM

- Roles and permissions: Administrators have greater control and flexibility to set permissions at the role, record, and field levels.
- Data hosted in best-in-class datacenters across the globe. You can even choose the country from which you're signing up from.
- Data processing: From built-in consent gathering to handling sensitive data during processing like data encryption at rest and in transit, Zoho CRM has it all covered.

Salesforce Sales Cloud

Salesforce provides three levels of data security: object level, field level, and record level. Role-based access, which controls who sees what, ensures data can only be accessed by employees of a particular role. Salesforce also provides additional security options like Multi-Factor Authentication and Shield Platform Encryption.

It is also compliant with various government regulations and ensures your organization complies with your customers' privacy policies and contract-based regulations.

Salesforce is compliant with ISO 2700, ISO 27017, ISO 27018, Privacy Shield, HIPAA, SOC (type 1, 2 and 3), GDPR and CSA.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Profiles	✓	✓	✓	✓	✓	✓	✓	✓
Org Roles	✓	✓	✓	✓	✓	✓	✓	✓
Reporting hierarchy		✓		✓	✓	✓	✓	✓
Field-level security			✓	✓	✓	✓	✓	✓
Data sharing rules				✓	✓	✓	✓	✓
Groups	✓	✓	✓	✓	✓	✓	✓	✓
Record-level sharing				✓	✓	✓	✓	✓
Data Encryption		✓		✓	✓	✓	✓	✓
Territory management					✓	✓	✓	✓
Audit Logs	✓	✓	✓	✓	✓	✓	✓	✓
Allowed IPs	✓	✓	✓	✓	✓	✓	✓	✓
GDPR compliance	✓	✓	✓	✓	✓	✓	✓	✓

*All information in the document is based on publicly available data.

Integrations and Add-ons

Connect your CRM seamlessly with the rest of your tech stack.



Businesses of today use not just a CRM, but also marketing, collaboration, telephony, messaging and customer support tools to manage their business. An ideal CRM solution should integrate with the business apps you use everyday and show you relevant customer context at every step. The advantage of choosing a software vendor like Zoho, which has 50+ products, is that we can cover all your business needs under a single roof. This minimizes compatibility issues and allows for easy data sync and better processing speeds.

Zoho CRM

Zoho CRM offers free integrations with most other Zoho products including Zoho Meeting, Zoho Desk for support, Cliq for collaboration, Zoho Campaigns for advanced marketing automation, Zoho Analytics for BI, and many more. It also has a huge marketplace of third-party apps which you can integrate with your CRM.

Salesforce Sales Cloud

Salesforce's App Exchange houses hundreds of third-party applications which integrate seamlessly with your CRM. However, in order to integrate with most of those apps, you need to be using the Professional or higher edition of Sales Cloud. There are also no direct integrations with some of the most widely used applications like Microsoft Teams, Trello, DotConnect, and help desk apps like Zendesk Support and Zoho Desk.

USPs for Zoho CRM

- Zoho CRM is future ready: With Zoho CRM, you automatically have access to more than 40 integrated business and productivity applications, on both web and mobile, for your entire organization. In the future, if your business requires solutions for your other departments, you can build out a comprehensive platform for every part of your organization with ease.
- Availability of add-ons: Unlike Salesforce, Zoho CRM makes its add-ons available to users of all editions.
- Integration with Google apps: Zoho CRM allows you to integrate directly with Google Analytics, Google Ads, Google Drive, and more.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Online Meetings								
Zoom	✓		✓	✓	✓	✓	✓	✓
GoToMeeting	✓		✓	✓	✓	✓	✓	✓
Zoho Meeting	✓		✓		✓		✓	
Telephony and PBX								
Ring Central	✓		✓	✓	✓	✓	✓	✓
Amazon Connect	✓		✓	✓	✓	✓	✓	✓
Zoho PhoneBridge	✓		✓		✓		✓	
Team Collaboration								
Slack	✓		✓	✓	✓	✓	✓	✓
Microsoft Teams	✓		✓		✓	✓	✓	✓
Zoho Cliq	✓		✓		✓		✓	

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Office Productivity								
Zapier	✓	✓	✓	✓	✓	✓	✓	✓
Trello	✓		✓		✓		✓	
Zoho Flow	✓		✓		✓		✓	
Storage								
Google Drive	✓		✓		✓	✓	✓	✓
Dropbox	✓	✓	✓	✓	✓	✓	✓	✓
Zoho Workdrive	✓		✓		✓		✓	
Analytics								
Google Analytics	✓	✓	✓	✓	✓	✓	✓	✓
DotConnect	✓		✓		✓		✓	
Zoho Analytics	✓		✓		✓		✓	

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Email Marketing								
Mailchimp	✓		✓	✓	✓	✓	✓	✓
Active Campaign	✓	✓	✓	✓	✓	✓	✓	✓
Zoho Campaign	✓		✓		✓		✓	
Customer Support								
Zendesk Support	✓		✓		✓		✓	
Salesforce Service Cloud	✓	✓	✓	✓	✓	✓	✓	✓
Zoho Desk	✓		✓		✓		✓	
Finance								
PayPal, Stripe, Quickbooks	✓		✓	✓	✓	✓	✓	✓
Razorpay, PayU	✓		✓		✓		✓	
Zoho Books, Finance Suite	✓		✓		✓		✓	

*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Business Operations								
Amazon Seller Central	✓		✓	✓	✓	✓	✓	✓
Microsoft Exchange	✓		✓	✓	✓	✓	✓	✓
Microsoft								
Plug-in for Outlook	✓	✓	✓	✓	✓	✓	✓	✓
365 integration	✓		✓	✓	✓	✓	✓	✓
Integration with Google Workspace								
Contextial Gadget for Gmail	✓		✓		✓		✓	
Export to Google Calendar	✓	✓	✓	✓	✓	✓	✓	✓
Export to Google Tasks	✓		✓		✓		✓	
CRM Webforms for Google Sites	✓		✓	✓	✓	✓	✓	✓
Sync Google Calendar	✓		✓	✓	✓	✓	✓	✓
Sync Google Contacts	✓		✓		✓		✓	

*All information in the document is based on publicly available data.

Developer Tools

Build scalable solutions for personalized user experience.



Every business has a unique customer persona and requires a unique solution to cater to its needs. It is therefore important for a CRM to be able to support the development and deployment of custom solutions to provide personalized user experiences. The platform and tools provided by your CRM vendor dictate the extent to which your developers can add to the capabilities of a vanilla CRM to address multi-faceted business use cases.

Zoho CRM

Zoho CRM offers a wide range of tools for developers to do everything from orchestrating complex workflows to integrating with the rest of your tech stack and building custom solutions for your apps. Businesses can extend Zoho CRM's user interface by seamlessly connecting widget applications that use Zoho CRM data and workflows in real time.

USPs for Zoho CRM

- Deluge functions: Develop complex workflows using a much simpler programming function which makes workflows easier to develop and maintain.
- Webhooks: Webhooks let you trigger actions in third-party applications every time an event occurs in CRM. From creating a contact to closing a deal, use webhooks to connect your CRM with hundreds of other apps.
- APIs and SDKs: Push and pull data seamlessly from your other applications and build custom solutions for web and mobile applications.

Salesforce Sales Cloud

Salesforce's proprietary code, Apex, is an object-oriented programming language which allows developers to execute complex flows which are not included by default. It should be noted that Apex is a complex programming language and building custom solutions with it requires a high level of skill and expertise. So you'll need a dedicated team of highly-skilled developers to build, deploy, and manage your custom flows.

Salesforce allows you to build plug-ins and workflow extensions for applying custom business logic and you can manage your business data effectively by integrating with external applications.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Mobile SDK					✓	✓	✓	✓
Web apps SDK				\$	✓	\$	✓	✓
Widgets					✓	\$	✓	\$
Connections					✓		✓	
API	✓		✓	\$	✓	✓	✓	✓
Functions					✓		✓	

Data Administration

Maintain the integrity of your customer data.



A CRM with good data administrative capabilities helps you organize all your company's customer data. Ensure that the data administrative capabilities in your CRM enable your administrator to create, verify records, provide hassle-free migration, and ample data backup capacity with minimal additional cost.

Features	Zoho CRM Standard	Salesforce Starter Suite	Zoho CRM Professional	Sales Cloud Professional	Zoho CRM Enterprise	Sales Cloud Enterprise	Zoho CRM Ultimate	Sales Cloud Unlimited
Free storage/org	1GB	?	1GB	?	1GB	?	5GB	?
Free storage/user license	512 MB		512MB	?	1GB	?	1GB	✓
Additional storage/user license		?	20 MB	?	50 MB	?	100 MB	?
Additional data storage	\$	\$	\$	\$	\$	\$	\$	\$
Import history	✓		✓	✓	✓	✓	✓	✓
Import data per batch	10,000 records	?	20,000 records	?	30,000 records	?	50,000 records	?
Export module data	✓		✓	✓	✓	✓	✓	✓
Free data backup	2 backups/month	?	2 backups/month	?	2 backups/month	?	4 backups/month	?
Additional data backup	\$	\$	\$	\$	\$	\$	\$	\$
De-duplicate data			✓		✓		✓	

*All information in the document is based on publicly available data.

Here's what ex-Salesforce customers say after they have switched to Zoho CRM



"I did some serious digging into Zoho and each new layer I pulled back I became more and more excited. Not only did I find a CRM solution but a platform that would allow me to lower my monthly tech spend by \$6k - \$11k while centralizing all my data for better business intelligence. Salesforce has become what they set out to originally destroy. They are the new Oracle, Dynamics, SAP, etc.... Just look at the cost you are incurring to turn that monster on and get it to 60% of what you really need. Your timeline to recoup your investment will take years, if ever. "

Michael McMillan

Chief Stategist, ONE, Inc



"Zoho had all of the functionality that we could ever need, at a fraction of the cost of Salesforce. It felt much more intuitive, and I was sure we would be very happy moving forward with Zoho. Anybody can use Zoho. The interface is straightforward, and the initial trial setup took very little effort."

Ignacio Galarraga

CEO, Netmen Corp



"Salesforce does a nice job of making people think all other CRMs lack functionality. We checked out Zoho and found that not only did it have all of the functionality Salesforce has, but the interface was much more thoughtful and well-designed. Bernard Health's bottom line has improved significantly since switching to Zoho."

Alex Tolbert

CEO, Bernard Health

Zoho CRM Awards and Titles Showcase

Zoho CRM has been lauded by online critics, review aggregators, and most importantly, our users since our inception. Thanks to the love and trust of our 250,000+ customers worldwide, we went onto be recognized as the world's favorite CRM. Below, we have listed some of the most noteworthy titles we've won recently.



Best CRM Software Of 2024

From all the vendors that were evaluated, we stood out for our wide range of features and robust customization capabilities. The editor believes that we deliver a range of features at a reasonable price, thereby delivering high value to our users.



Visionary in 2023 Magic Quadrant™ for Sales Force Automation Platforms

Gartner named Zoho a Visionary in its 2023 Magic Quadrant for Sales Force Automation. Zoho CRM has been a consistent part of this Gartner MQ for several years, which we believe is thanks to the robust feature set, exceptional customer experience, and wide market presence.



Nucleus Research - Leader CRM Technology Value Matrix

Nucleus Research creates the Value Matrix based on in-depth interviews with end users and customers, vendor participation, and extensive ROI assessments of technology deployments. Assessed within the context of the CRM market today, Zoho is placed as a leader in the 2024 CRM Technology Value Matrix.



Capterra - Top Performer in CRM Software Category, 2024

In 2024, Capterra crowned as the top performer in several categories, including CRM Software, Sales Force Automation Software, Lead Management Software, and more.

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