



**Voice of
the customer in
Zoho CRM**



A detailed overview



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What is Voice of the Customer?

Voice of the Customer (VoC) is the process of continuously improving business services and processes by systematically collecting customer feedback from multiple channels and analyzing that feedback to derive actionable insights.

The resulting improvements ultimately lead to enhanced customer satisfaction, refined internal processes, improved product and service offerings, better communication, and much more.

How can you elevate your business operations with VoC?

- Gather customer perspectives and feedback to understand, prioritize, and address customer needs and issues based on individual customer attributes.
- Extract nuanced feedback, determine customer preferences, and identify pain points with precision.
- Craft meticulous plans, incorporate effective strategies, and make well-informed decisions.
- Tailor customer experiences, proactively address customer needs, and optimize customer interactions.
- Strengthen customer relationships and foster enduring loyalty and growth.

Introduction to VoC in Zoho CRM

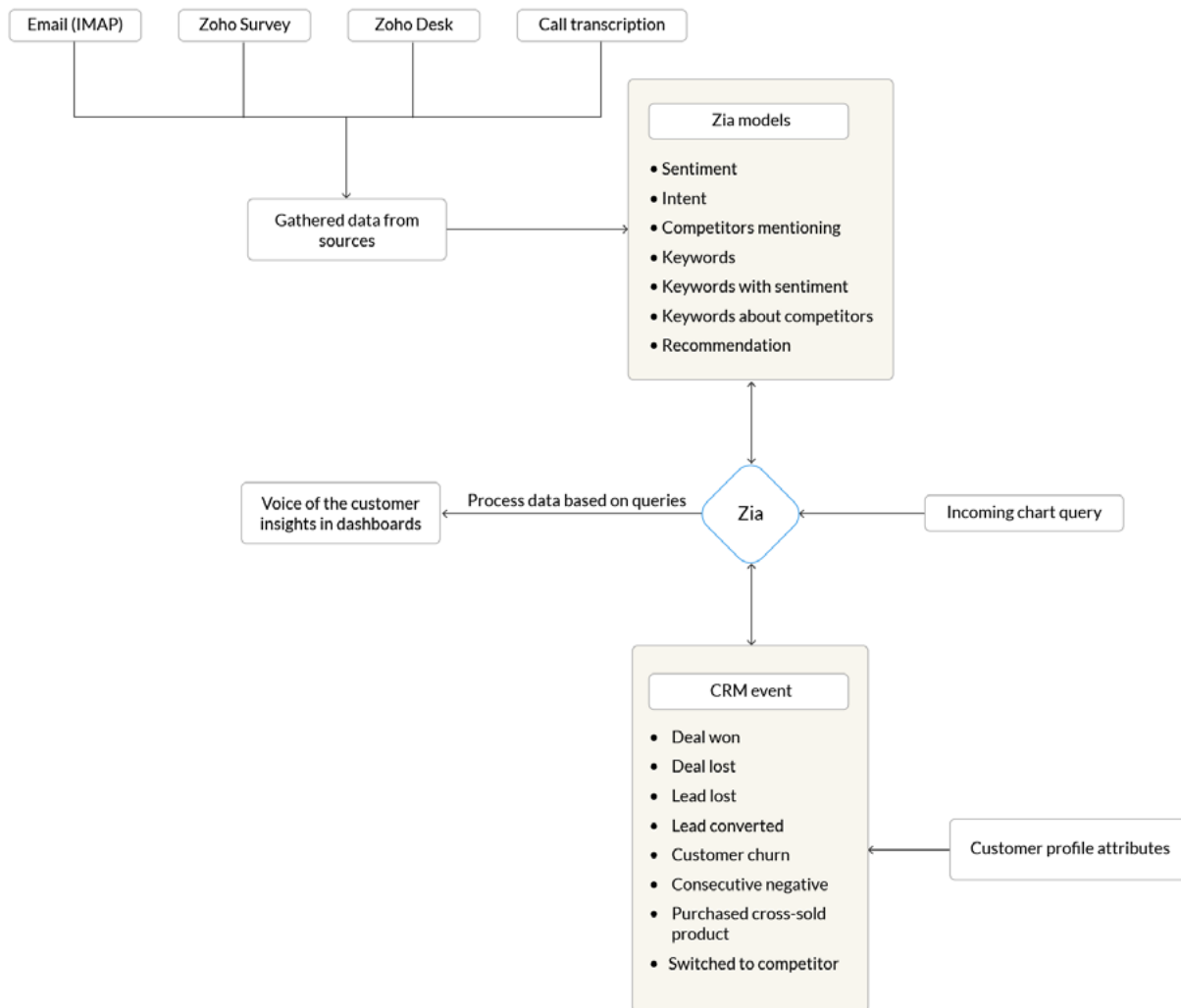
In addition to data from Zoho Desk and Zoho Survey integrations, Zia—Zoho’s AI-powered sales assistant—collects data from multiple data sources like emails and call transcripts in Zoho CRM. Zoho CRM’s VoC feature consists of various dashboards with multiple charts. The amount of data collected from the data sources must be sufficient for Zia to generate these charts.

Upon enabling the VoC feature, the amount of time required to generate insights depends on the configuration and the amount of data available. Once the insights are generated, you can view them in the Voice of the Customer module.

Having enough data and mapping the right modules and fields is key to generating the best possible insights.

Note: The feature is available for organizations in CRM Enterprise, CRM Ultimate, CRM Plus and Zoho One with 20 user licenses or more.

The flow chart below depicts how the VoC feature in Zoho CRM works:





Use cases

Premise

Let's say you run a hotel that provides accommodations, event spaces, and related services.

Your aim is to gauge your customers' sentiments towards your services and use those insights to plan business strategies, refine your products and services, improve internal and external communication, and address customer needs and issues more efficiently. Hence, it's crucial to listen to customers constantly and gather relevant insights and feedback to provide them with an enriching experience with your brand.

Let's now have a look at how you can use the VoC feature in Zoho CRM for various business scenarios.

Basic configuration

The kinds of VoC insights you generate are based on your configuration. For our example hotel scenario, let's assume you want to derive VoC insights by looking at the following modules:



Customers

The Customers module is your primary module for which you need insights. In our case, you want to extract VoC insights based on your customers and their activities with your hotel.

Company

The Company module is your parent module. This module is related to your primary module via a lookup field. There may be instances where you have multiple bookings for multiple employees from an organization, in which case, you should also consider the company's information as well.

Bookings

For your hotel business, the Bookings module is your sales module, which is where you record all your sales details.

Services

The Services module serves as your inventory module, which you can use to track the various services you offer, such as accommodations, event halls, and so on.

Voice of the Customer Active



It is a qualitative and quantitative research about the pulse of your customers based on their responses from various channels you have integrated with. [Click here](#) to access voice of the customer dashboards.

Note:

Voice of the Customer can be derived from [Zoho Survey](#), [Email](#), [Zoho desk](#) and [Call transcription](#), if integrated.

[Deactivate](#)

General settings

[View Excluded Email ID\(s\)](#)

For visualizing insights on dashboards generated from the gathered data, select primary modules along with their respective parent, sales and inventory modules.

Select Modules



For the integration part, let's say you have all the supported integrations—namely, Zoho Survey, Zoho Mail, Zoho Desk, and Call Transcription—connected to your CRM account. If you don't have any of the above apps integrated, then the dashboards generated based on those particular integrations will not have any data.



Response-based sentiment analysis

Use case 1 - Customer satisfaction evaluation

Overview

You want to analyze the sentiment your customers have felt towards your services over the last three months. Using their responses, you can gauge their reactions using a sentiment analysis chart. The chart depicts the distribution of positive, negative, and neutral sentiments.

Chart

Overall Customer Count by Sentiment



Total Customer Count : 258

● Positive	48
● Neutral	80
● Negative	130

Conclusion

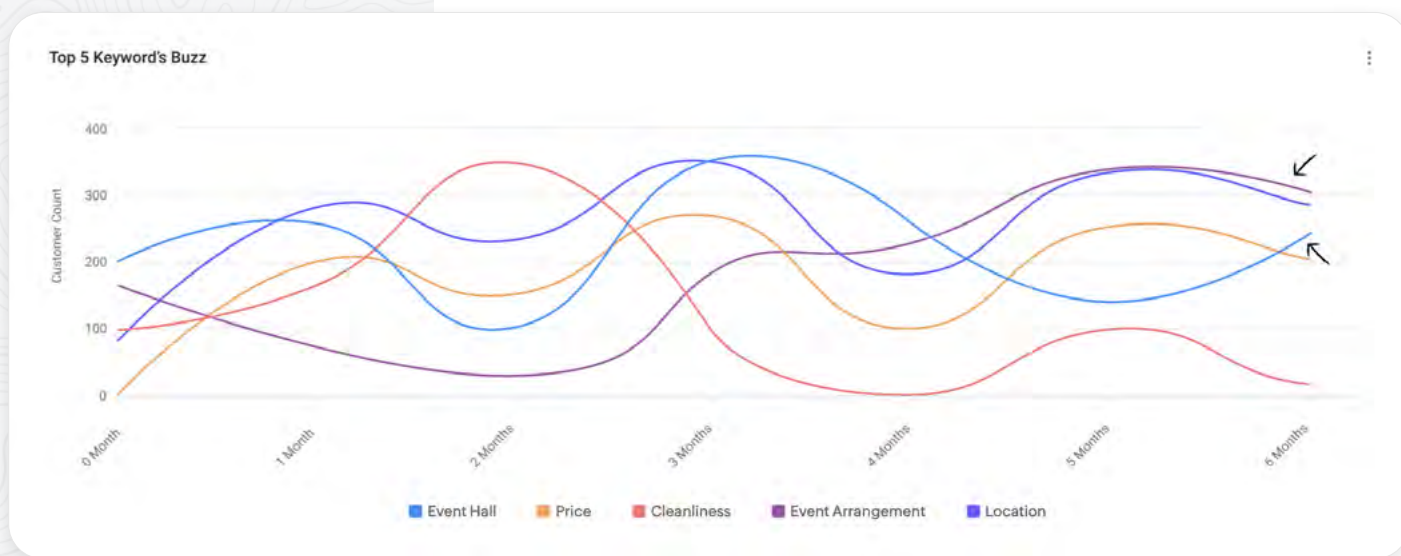
We can see that negative sentiment is high, coupled with a pretty low positive sentiment—which means customers are largely dissatisfied with your services. Knowing this, you can quickly identify and address customer issues and improve their satisfaction levels.

Use case 2 - Identifying customer interests

Overview

You want to determine what your customers have been interested in recently. You consider the past six months for this analysis. The keywords buzz chart can help you zero in on the keywords that have been capturing your customers' attention.

Chart



Conclusion

The keyword **event hall** has recently trended upward, while the **event arrangement** keyword has maintained its high trend, which demonstrates that customers see value in your event hall, and hence, that there is high demand for it for hosting events. Knowing this, you can further equip your event hall and related amenities, and then identify effective strategies for attracting customers towards your event offerings.

Help documentation

To explore the response-based sentiment analysis dashboard in detail, please refer to this help documentation:

[Response-based sentiment analysis - help documentation](#)

Sentiment-based profile analysis

Use case 1 - Analyzing lost bookings

Overview

Let's say you lost some good bookings over the last six months and are looking into the possible reasons for those losses.

With a quadrant chart for lost bookings, you can categorize them by the keywords customers have mentioned after their purchases.

Chart



Conclusion

It turns out you lost a significant number of bookings due to pricing concerns. From Quadrant 1, you sense that your most loyal and high-revenue customers perceive your pricing with a negative sentiment, which is alarming, and indicates that you might need to revisit your pricing strategies.

Use case 2 - Monitoring shifts in customer sentiments

Overview

After analyzing your lost bookings, you address your services' pricing issues, but you still need to know if the change in pricing has really made your customers happy.

The Top 3 Keywords For Customer Trend chart shows the transition of customers from “detractor sentiment” (negative) to “promoter sentiment” (positive), and the keywords associated with the shift.

Chart

Top 3 Keywords For Customer Trend

Keyword for Customer Trend	Customer Count	Customer Count In Months						
		Month 0	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Detractor to Promoter								
Price	130	10	8	12	27	29	40	44
Rooms	165	15	44	20	12	13	50	33
Event Hall	175	66	33	66	25	16	63	60
Promoter to Detractor								
Website	130	33	46	40	30	21	14	7
Trek Packages	153	10	27	27	44	10	30	33
Contact Details	137	20	15	23	50	10	5	15

Conclusion

From the chart, you can see that customers who initially expressed dissatisfaction with the price (detractors) have gradually shifted to having a positive sentiment (promoters). This shift aligns with the revision in your pricing.

Help documentation

To explore the sentiment-based profile analysis dashboard in detail, please refer to this help documentation:

[Sentiment-based profile analysis - help documentation](#)

Competitor analysis

Use case 1 - Detecting competitive weaknesses

Overview

You can use the word cloud chart to identify your disadvantages compared to your competitors. Your aim is to identify the aspects of your services that your customers feel dissatisfied with.



Chart



Conclusion

The chart indicates certain positive trends related to some aspects of your competitor. Of these, the pricing, cleanliness, event hall, and activities are prominent mentions. This positive sentiment for your competitor translates to a disadvantage for you.

Armed with this insight, you can prioritize improvements and also revisit your approach to these aspects—to improve customer satisfaction and potentially close the sentiment gap with your competitors.

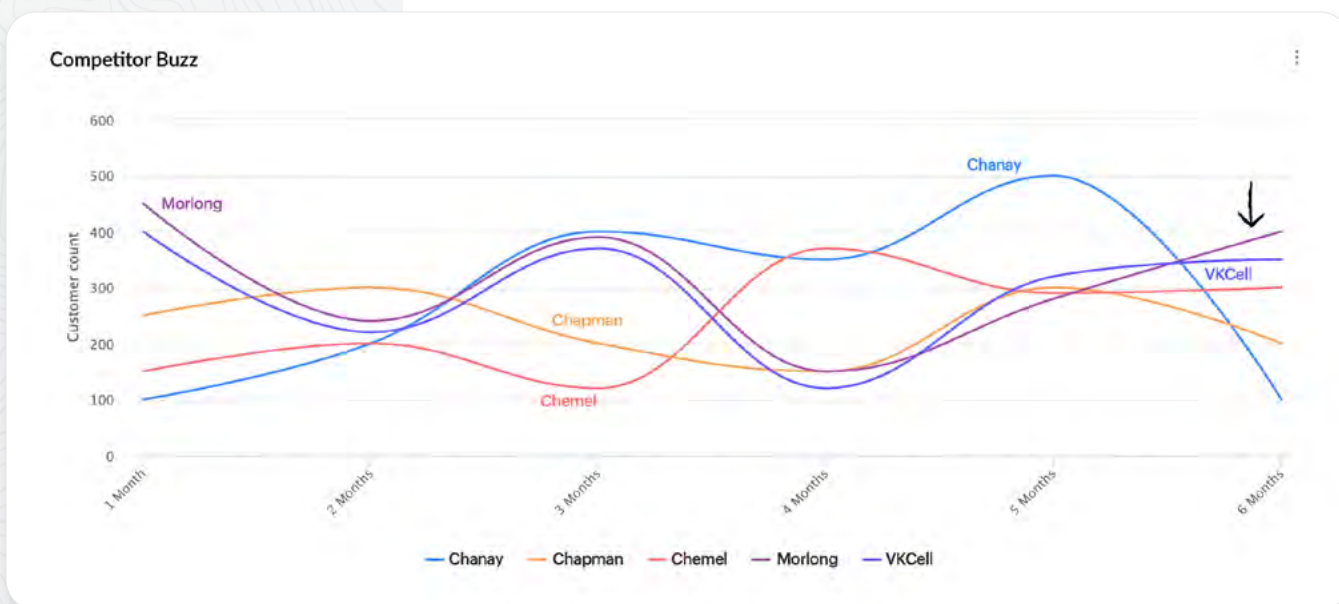
Subsequently, you can also prioritize the less prominent positive aspects of your competitors as the target of your next set of action items.

Use case 2 - Assessing customer perception shifts

Overview

You want to evaluate customer sentiments in relation to your key competitors for the last six months. The competitor buzz chart displays buzz trends for your top competitors based on their mentions in customer responses.

Chart



Conclusion

The chart shows that Morlong's buzz has been consistently higher than usual over the past one to two months. Further analysis reveals that an offer is running for new customers for those months, which has increased the buzz of that competitor.

You can capitalize on this buzz by introducing exciting offers that provide better value than your competitor's offers.

Help documentation

To explore the competitor analysis dashboard in detail, please refer to this help documentation:

[Competitor analysis - help documentation](#)

Survey comparison

Use case 1 - Guiding business planning

Overview

You're planning to identify which areas of your service offerings might need revamps using feedback you've obtained through customer surveys across the past few months. The survey comparison chart provides these insights by analyzing responses from various customer feedback surveys.

Chart

Overall Top Keywords Keywords based on Zylker Hotel Survey - June

Keywords	Sentiment	Zylker Hotel Survey - June	Zylker Hotel Survey - September	Zylker Hotel Survey - December
Booking Experience	Positive	147	↓ 137	↑ 331
Hotel Information	Neutral	574	147	324
Food and Beverages	Negative	87	258	214
Rooms	Positive	92	147	112
Pricing	Neutral	147	68	254
Events	Negative	324	471	225
Amenities	Positive	258	257	54
Staff and Services	Positive	147	↑ 324	↓ 144
Website	Positive	200	274	214

Conclusion

You discover that keywords for food and beverages and events have had negative mentions. Based on these insights, you can allocate and prioritize resources accordingly to enhance these aspects of your offerings, thus aligning your business plans with customer preferences.

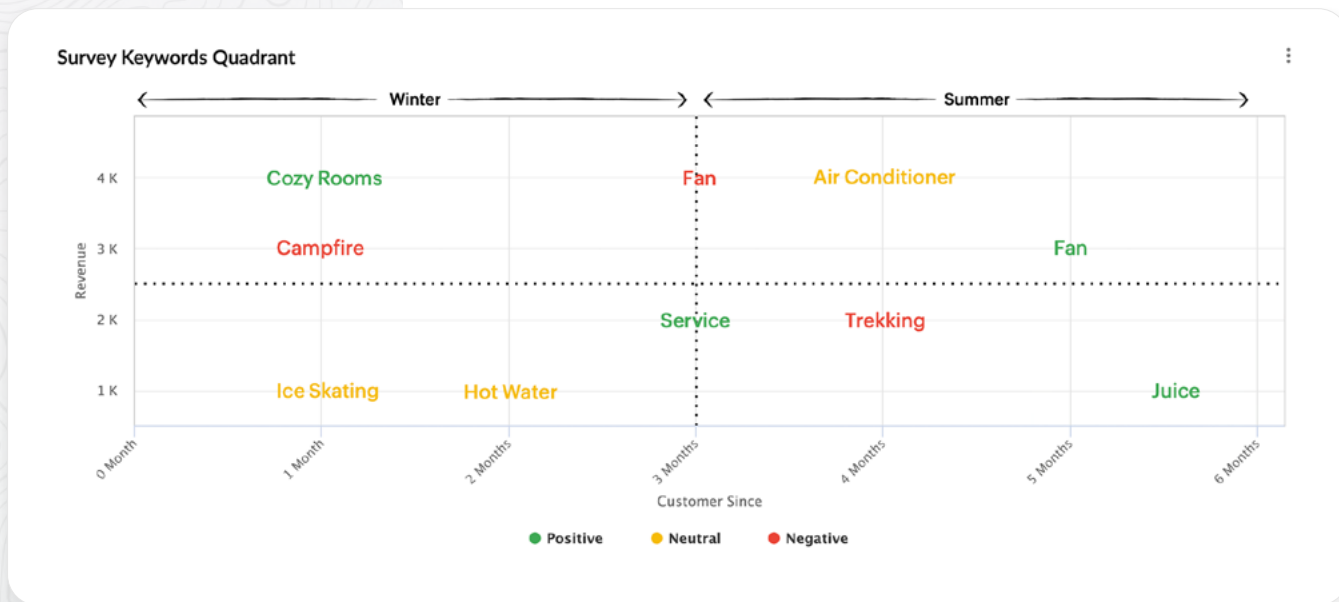
Use case 2 - Seasonal variation in perception

Overview

Customers might have different perceptions and needs during certain periods of the year. You try to identify the demand and perception of your services across different time periods.

The Survey Keyword Quadrant chart tracks how customers perceive the importance of specific services across different times of the year.

Chart



Conclusion

During winter, the chart reveals a surge in mentions of cozy rooms to withstand the cold. As the summer approaches, there are increasing mentions of air conditioners and fans to beat the heat. Acting on these feature perceptions, you can optimally plan your services throughout the year.

Help documentation

To explore the survey comparison dashboard in detail, please refer to this help documentation:

[Survey comparison - help documentation](#)

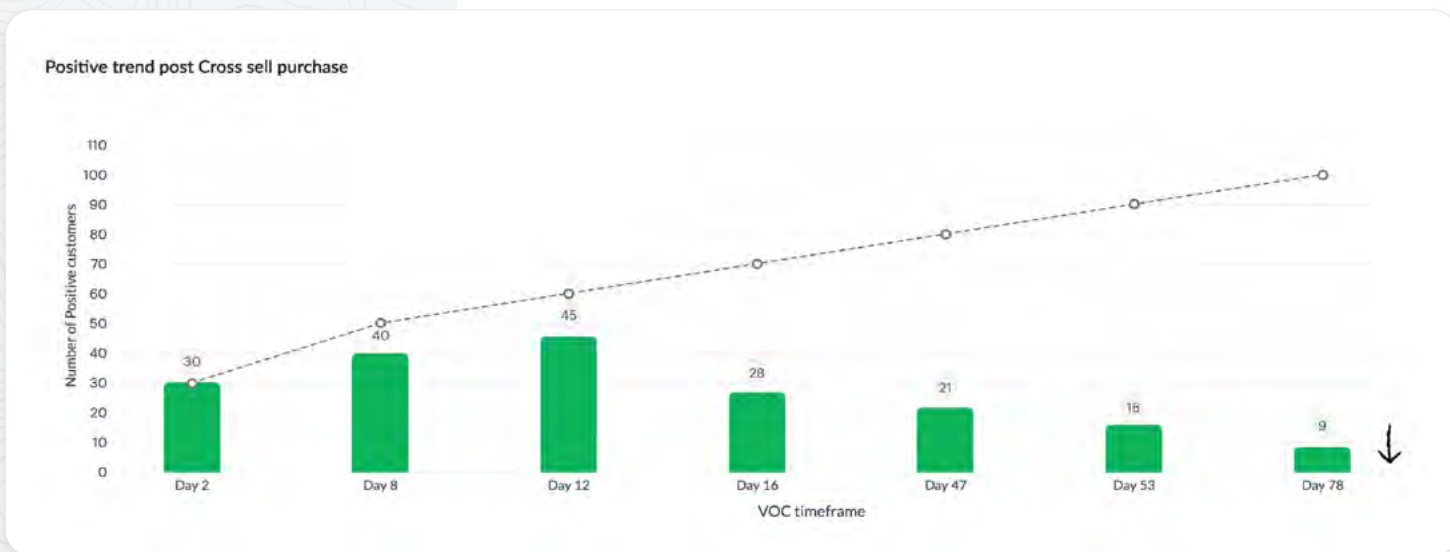
Cross-sell analysis

Use Case - Tracking positive trends post cross-sell

Overview

To offer personalized services to your customers, you combine and cross-sell relevant services. For example, an organization may book your event hall for a couple of days, thus presenting you with the opportunity to offer them your accommodation services as well. The positive trend chart for cross-sells highlights the progression of how positively customers respond to your cross-selling efforts across a certain time period.

Chart



Conclusion

After a certain period of time, you notice that positive responses towards your cross-sell options are gradually decreasing. This might be due to a change in customers' accommodation needs or a gradual decrease in the efficiency or quality of your stay-related services. You can work on identifying the root cause and implement appropriate solutions.

Help documentation

To explore the cross-sell analytics dashboard in detail, please refer to this help documentation:

[Cross-sell analytics - help documentation](#)

Segmentation analysis

Use Case 1 - Service effectiveness

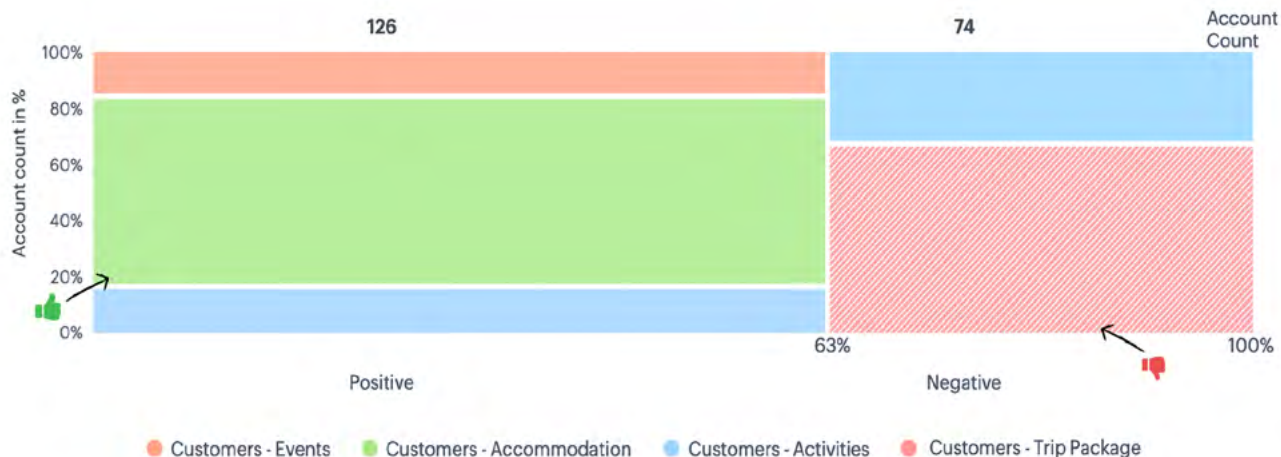
Overview

You want to analyze the reception to your business campaigns for various services you offer. Marimekko charts depict segment-specific response rates to campaigns based on [RFM scores](#) (recency, frequency, and monetary value of these purchases), and can reveal which segments are most well-received. You can make adjustments to future campaigns based on these insights.



Chart

Segment by Sentiment analysis



Conclusion

The Marimekko chart reveals that a lot of customers who book accommodation in your hotel have a positive opinion of your services. To retain this customer segment, you may provide them with complimentary services, reasonable discounts, or other relevant offers.

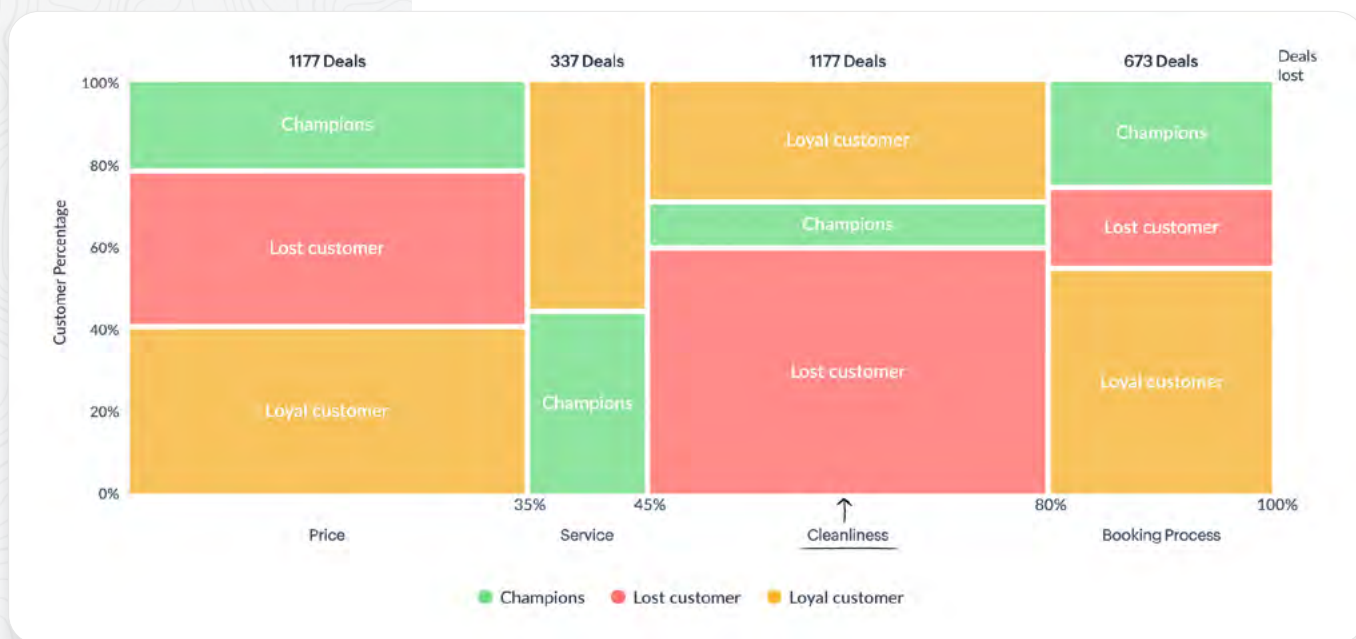
Meanwhile, customers who book entertainment activities in your hotel have a negative opinion of your services. You can use this information to revamp your activities and services to improve the quality of the experience and the perceptions of this customer segment.

Use case 2 - Winning back churned customers

Overview

You've recently lost a few customers and are looking for ways to win these churned customers back. The segment by churn analysis chart can help you identify the reasons for churn.

Chart



Conclusion

You identify that a sizable portion of “Lost Customers” have expressed the keyword “Cleanliness” negatively in their feedback and have churned out.

Analyzing their feedback, enhancing your hotel's cleanliness, and providing incentives may encourage them to return.

You can also develop engagement strategies that remind "Lost Customers" of their positive experiences and reactivate their engagement.

Help documentation

To explore the segmentation analysis dashboard in detail, please refer to this help documentation:

[Segmentation analysis - help documentation](#)

Call analytics

Use Case - Identifying prevalent customer concerns

Overview

You want to identify which concerns customers express most commonly through calls. The Frequently Spoken Keywords by Customers word cloud chart provides you with customers' most commonly mentioned concerns.



Chart

Frequently Spoken Keywords by Customers

Booking App **Location** **Room Service** **Price Packages** **Event Hall** **Check Out Time** **Balcony** **Rooms** **Geyser**

■ Positive ■ Neutral ■ Negative

[View Keyword Drilldown](#)

Conclusion

From the chart, you see that there are negative mentions related to your booking app, balcony availability, and room services. With these findings, you can prioritize the improvement of these aspects for a better customer experience. Apart from the negative mentions, you can also work on improving neutral aspects while also building on positive ones.

Help documentation

To explore the call analytics dashboard in detail, please refer to this help documentation:

[Call analytics - help documentation](#)

Voice-based forecast analysis

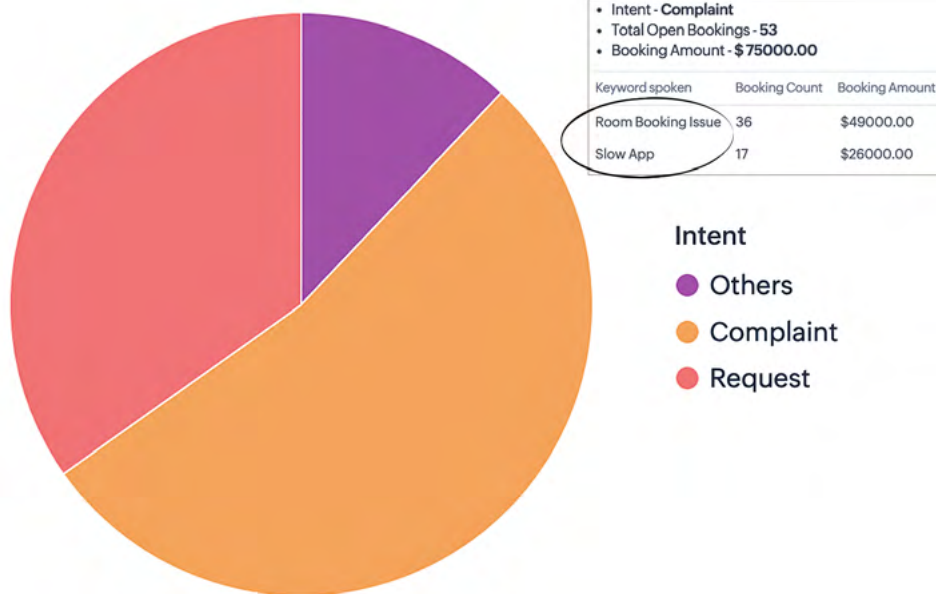
Use Case - Arresting the loss of bookings

Overview

There has been a notable decrease in successful deal closures in the current quarter, placing your targets in jeopardy. In addition to analyzing your unsuccessful deals, you try to prevent further unsuccessful deals by looking into customers' sentiments towards your currently open deals.

Chart

Open Deal Amount by Intent



Conclusion

You find that there's a surge in complaints related to issues with booking rooms and the speed of your app. Upon further analysis, you deduce that after the recent update in your booking process, there have been a lot of errors and latency issues, which have been hindering your customers from making bookings.

You can quickly look into and resolve these issues to prevent the loss of more bookings and make your forecasts.

Help documentation

To explore the voice-based forecast analysis dashboard in detail, please refer to this help documentation:

[Voice-based forecast analysis - help documentation](#)

Gather, analyze, and act on customer interactions

By leveraging customer perspectives and feedback alongside essential user attributes, VoC enables you to achieve customer-centricity and drive your business forward.

As you continue to listen to your customers actively and adapt your offerings accordingly, you can strengthen customer loyalty, foster brand advocacy, and position your business for sustained growth in an ever-evolving market.

To get answers to some common questions about the VoC feature in Zoho CRM, please refer to this [Voice of the Customer \(VoC\) - FAQ](#).



Contact us

Ready to dive deep into your customers' interactions and elevate their experience with your brand? Get started with Voice of the Customer in Zoho CRM. For help with setting up or using VoC capabilities in Zoho CRM, please reach out to **support@zohocrm.com**.

