



# 25 Essential Zoho Automations for Businesses

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[erphub.com](https://erphub.com) 

[contact@erphub.com](mailto:contact@erphub.com) 

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1925 St Clair Ave #202, Cleveland, OH 44114 



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# About this document

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This ebook is designed as a guidance notion for your business, offering a curated guide to 25 automations that can significantly impact the speed and effectiveness of a business. Powered by the versatile suite of Zoho applications, these automations are selected for their ability to drive efficiency across functions, applicable to business models that are B2B, B2C or a blend of both.

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# Automation Set 1

## Streamlining Lead Capture and Initial Response

### Automate Lead Creation from Submissions

**Problem:** Manually transferring information from contact touch-point into your CRM is slow, repetitive, and can lead to data entry errors.

**Automation Benefit:** Ensures instant capture of all website inquiries, eliminates manual data entry, reduces the risk of errors, and allows for immediate engagement with potential leads, significantly improving lead response time. Applicable to capturing inquiries for B2B services or B2C product information.

### Automate Lead Assignment to Sales Representatives & Navigation Guidance

**Problem:** Consulting for leads among your sales team manually can be inefficient, result in uneven workloads and delay the initial contact with the lead.

**Automation Benefit:** Zoho CRM's Assignment Workflows and Rules allow you to automatically assign newly created leads to specific sales representatives, guide them at their actions and monitor for navigation. It guarantees that every lead dealt with its unique structure follow-up and also balances the workload across the sales team, ensuring prompt follow-ups, increasing sales efficiency and improving lead conversion rates.

### On-boarding Email Series to New Leads

**Problem:** Sending a personalized welcome email to every new lead manually is a time-consuming task that becomes unmanageable with increasing lead volume.

**Automation Benefit:** Zoho CRM Workflow Rules, triggered when a new Lead record is created, you can automatically have new contacts categorized and have a pre-defined welcome email series to each category of leads. Email campaigns can be customized to include personalized information for the lead records among categories of leads. It provides immediate acknowledgment and engagement with new leads on basis of how they have categorized under pre-defined criteria by you and/or your team, ensures consistent brand messaging, saves sales representatives valuable time, and initiates the communication process automatically.

## Automation Set 1 (Continued)

### Streamlining Lead Capture and Initial Response

#### Automate Internal Notifications for High-Priority Leads

**Problem:** Sales teams may not be immediately aware when a high-priority lead enters the system or takes a significant action, potentially delaying crucial follow-up.

**Automation Benefit:** Zoho CRM Workflow Rules can be configured to send instant internal notifications (via email, in-app alert, or integration with team chat like Zoho Cliq) to sales managers or specific representatives when a lead meets certain criteria (e.g., high lead score, specific industry, request for demo). It ensures that high-priority leads receive immediate attention, reduces the risk of delays in follow-up, and helps the sales team prioritize their efforts effectively.

#### Automate Creation of Initial Follow-up Tasks

**Problem:** Sales representatives may forget to schedule or perform the necessary initial follow-up tasks after a new lead is assigned or a welcome email is sent.

**Automation Benefit:** Zoho CRM Workflow Rules, triggered by lead creation or assignment, can automatically create specific tasks for the assigned sales representative (e.g., "Call Lead," "Send Introduction Email," "Schedule Discovery Call"). It guarantees that initial follow-up actions are consistently carried out in a unique manner that is pre-defined for any lead category and tracked, improves adherence to the sales process, and helps sales reps stay organized by providing clear next steps.

## Automation Set 2

# Enhancing Lead Nurturing and Qualification

### Automate Lead Nurturing Email Sequences

**Problem:** Manually sending a series of targeted emails to leads over days or weeks to educate them about your offerings and build interest is labour-intensive and difficult to personalize at scale.

**Automation Benefit:** Zoho Marketing Automation and Zoho Campaigns allow you to create automated drip campaigns or customer journeys triggered by lead actions (e.g., website visits, content downloads, form submissions) or segmentation criteria. This nurtures leads consistently and at scale, keeps your brand top-of-mind, educates prospects effectively, and moves them closer to becoming sales-ready leads.

### Automate Lead Scoring Based on Engagement and Demographics

**Problem:** Manually evaluating leads based on their interactions and profile information to determine their sales readiness is subjective, time-consuming, and can lead to inconsistent prioritization.

**Automation Benefit:** Zoho CRM's Scoring Rules allow you to automatically assign points to leads based on predefined criteria (e.g., job title, company size) and their engagement activities (e.g., email opens/clicks, website visits, form submissions, social media interactions). Scores update in real-time as leads engage. It provides an objective and dynamic way to qualify leads, helps sales representatives prioritize their follow-up efforts on the most engaged and promising prospects and improves overall lead conversion rates.

### Automate Lead Status Updates Based on Score

**Problem:** Manually updating a lead's status (e.g., from "New" to "Marketing Qualified Lead" or "Sales Qualified Lead") once they reach a certain engagement level is a manual step that can delay the handoff to sales.

**Automation Benefits:** Zoho CRM Workflow Rules, triggered when a lead's score reaches a pre-defined criteria, can automatically update the lead's status field. This can also trigger other actions, such as assigning the lead to a sales rep or sending a notification. It ensures timely and consistent lead status updates, streamlines the lead qualification process, and facilitates a faster handoff of qualified leads to the sales team.

## Automation Set 2 (Continued)

### Enhancing Lead Nurturing and Qualification

#### Automate Follow-up Tasks Based on Lead Behavior

**Problem:** Sales or marketing teams may miss opportunities to follow up with leads who take specific high-intent actions (e.g., visiting the pricing page, requesting a demo) if they rely on manual tracking.

**Automation Benefit:** Integrating Zoho SalesIQ (website visitor tracking) or Zoho Marketing Automation with Zoho CRM via Workflow Rules or Zoho Flow allows you to automatically create tasks or send notifications to sales/marketing teams when a lead performs a specific action on your website or engages with a campaign in a particular way. This ensures timely and contextual follow-up based on explicit lead interest, increases the likelihood of engaging leads when they are most receptive and improves coordination between marketing and sales.

#### Automate Unsubscribes and Opt-Outs

**Problem:** Manually managing email unsubscribes and opt-out requests across different systems is time-consuming and carries compliance risks if not handled promptly and accurately.

**Automation Benefit:** Zoho Marketing Automation and Zoho Campaigns automatically handle unsubscribe requests from emails sent through the platform. Integrating these with Zoho CRM ensures that the contact's opt-out status is synced across systems. It ensures compliance with email marketing regulations, maintains data accuracy regarding contact preferences and saves time on manual list management.

## Automation Set 3

# Optimizing Sales Pipeline and Deal Management

### Optimizing Sales Pipeline and Deal Management

**Problem:** Sales representatives may not consistently follow the defined sales process, leading to deals stalling in the wrong stages and inaccurate pipeline reporting.

**Automation Benefit:** Zoho CRM's Blueprint feature allows you to define a standardized sales process with specific stages and transitions. It standardizes the sales process across the team, ensures deals move through the pipeline correctly, improves data accuracy for pipeline reporting and forecasting and provides better visibility into sales bottlenecks.

### Automate Quote Generation from Deal Data

**Problem:** Manually creating quotes for prospects is a time-consuming and error-prone task that can slow down the sales cycle.

**Automation Benefit:** Zoho CRM allows you to create quote templates that pull data directly from the associated Deal and Account records. Sales representatives can generate a professional quote automatically with a few clicks, pre-populated with relevant information. It accelerates the quote generation process, reduces manual data entry and potential errors, frees up sales representatives' time, and speeds up the sales cycle, leading to faster deal closures.

### Automate Quote Delivery to Prospects

**Problem:** Manually sending generated quotes to prospects via email is a repetitive step that can be automated.

**Automation Benefits:** Zoho CRM Workflow Rules, triggered by the creation of a Quote record or a change in Deal stage (e.g., "Quote Sent"), can automatically send the generated quote as a PDF attachment via email to the prospect. It ensures timely delivery of quotes to prospects, reduces manual steps for sales representatives, and maintains a consistent communication process. Applicable to sending quotes for B2B or B2C sales opportunities.

## Automation Set 3 (Continued)

### Optimizing Sales Pipeline and Deal Management

#### Automate Follow-up Reminders for Deals in Specific Stages

**Problem:** Deals can stall in certain pipeline stages if sales representatives don't follow up consistently, leading to missed opportunities.

**Automation Benefit:** Zoho CRM Workflow Rules can be set up to trigger email reminders or task creations for sales representatives if a deal remains in a specific stage for longer than a predefined period (e.g., "Negotiation" stage for more than 7 days). It ensures consistent follow-up on deals that may be stalling, helps sales representatives manage their pipeline effectively, and increases the likelihood of moving deals forward.

#### Automate Deal Approval Workflows

**Problem:** Complex deals may require approval from sales managers or other stakeholders before they can be closed, and managing this approval process manually can be slow and difficult to track.

**Automation Benefit:** Zoho CRM's Approval Processes allow you to define multi-stage approval workflows for deals based on criteria (e.g., discount percentage, deal value). The system automatically routes the deal to the designated approvers and sends notifications. Standardizes the deal approval process, improves transparency and accountability in the approval workflow, reduces delays in getting deals approved, and ensures necessary oversight for complex transactions.

# Automation Set 4

## Enhancing Customer Service and Support

### Automate Ticket Creation from Incoming Emails

**Problem:** Manually creating support tickets from customer emails is time-consuming and can lead to delays in addressing customer issues.

**Automation Benefit:** Zoho Desk automatically converts incoming emails sent to your support email address into tickets. The system captures the sender's information and the email content, creating a structured ticket record. Ensures that all customer email inquiries are captured and tracked, eliminates manual ticket creation, reduces response times, and provides a centralized system for managing support requests.

### Automate Ticket Assignment to Support Agents

**Problem:** Manually assigning incoming support tickets to the appropriate agents can be inefficient, lead to delays, and result in uneven workload distribution.

**Automation Benefit:** Zoho Desk's Assignment Rules allow you to automatically assign tickets to specific support agents or teams based on criteria such as the ticket's subject, content keywords, customer type, or predefined rules like Round Robin. It ensures tickets are assigned instantly to the right agent, balances workload, and guarantees prompt attention to customer issues, improving response times and agent productivity.

### Automate Acknowledgement Emails to Customers

**Problem:** Manually sending an email to customers confirming that their support request has been received is a repetitive task.

**Automation Benefits:** Zoho Desk can automatically send a customizable acknowledgment email to the customer as soon as a new ticket is created. This email can include the ticket number and information on expected response times. Provides immediate confirmation to the customer that their request is being handled, sets expectations for response time, and improves customer satisfaction through timely communication.

## Automation Set 4 (Continued)

### Enhancing Customer Service and Support

#### Automate Notifications for Ticket Updates

**Problem:** Customers and support agents need to be informed of updates to a ticket (e.g., status change, agent response) without manual communication.

**Automation Benefit:** Zoho Desk automatically sends email notifications to the customer when the ticket status is updated or an agent responds. It also notifies the assigned agent when the customer replies and keeps customers informed about the progress of their request, ensures agents are aware of customer responses, improves communication flow and enhances transparency in the support process.

#### Automate Ticket Escalation Based on SLAs

**Problem:** Tickets that are not resolved within the agreed-upon Service Level Agreements (SLAs) can lead to customer dissatisfaction if not escalated promptly or effectively alerted for before-hand prior to aspects heading towards non-compliance based on agreed SLAs for each account.

**Automation Benefit:** Zoho Desk allows you to define SLAs and create Escalation Rules. If a ticket is not responded to or resolved within the specified timeframes, the system can automatically escalate it by notifying a manager, reassigning it to a different agent or by changing its priority. This is useful in ensuring compliance with SLAs and it prevents critical tickets from being overlooked. It also enables proactive intervention for delayed resolutions and improves overall customer satisfaction by addressing issues promptly.

# Automation Set 5

## Enhancing Customer Service and Support

### Automate Email Campaign Sending to Segments

**Problem:** Manually sending targeted email campaigns to specific customer segments is time-consuming and prone to errors in list management.

**Automation Benefit:** Zoho Marketing Automation and Zoho Campaigns allow businesses to define dynamic segments based on criteria from your CRM or other data sources. This can then be scheduled or put as trigger automated email campaigns to be sent specifically to defined dynamic or static segments. It enables highly targeted and relevant email marketing, improves engagement rates, reduces manual list management and ensures campaigns reach the intended audience efficiently.

### Automate Social Media Publishing

**Problem:** Manually posting content on various placements across social media platforms at optimal times is a time-consuming daily task.

**Automation Benefit:** Zoho Social allows you to schedule social media content that is placement specific in advance across multiple platforms. You can plan your content calendar for each placement across each social media channel and automate the publishing process. It ensures a consistent social media presence, saves time on manual posting throughout the day and helps reach your audience when they are most active.

### Automate Social Media Reporting across Social Media Channels

**Problem:** Manually identifying and capturing leads who interact with your brand on social media is inefficient and can lead to missed opportunities.

**Automation Benefits:** Zoho Social can monitor mentions and keywords related to your brand. You can set up automation rules to automatically create a Lead record in Zoho CRM when specific social media interactions occur (e.g., a direct message, a mention with a specific hashtag).

## Automation Set 5 (Continued)

### Streamlining Marketing Campaign Execution

#### Automate Event Promotion and Registration Follow-up

**Problem:** Promoting events (webinars, workshops) and following up with registrants and attendees manually is a labor-intensive process.

**Automation Benefit:** Zoho Backstage (for events) or Zoho Meeting (for webinars) integrates with Zoho Marketing Automation or Zoho Campaigns. You can automate event invitations, registration confirmations, reminders, and post-event follow-up emails based on attendee status (registered, attended, no-show). This streamlines event promotion and communication, increases attendance rates through timely reminders, ensures prompt follow-up with prospects, and saves time on manual outreach. Applicable to promoting B2B webinars or B2C workshops.

#### Automate Customer Feedback Surveys Post-Interaction

**Problem:** Manually sending customer satisfaction surveys after a purchase or support interaction is inefficient and can result in delayed feedback collection.

**Automation Benefit:** Integrating Zoho CRM, Zoho Desk, or Zoho Commerce with Zoho Survey via Workflow Rules or Zoho Flow allows you to automatically send a survey link to customers after a specific event (e.g., deal closure, ticket resolution, purchase completion). It collects timely customer feedback automatically, helps measure satisfaction levels, identifies areas for improvement, and enables proactive service recovery based on responses.

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## Contact Us:

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-  TEL: +1 (330) 591-1500
-  EMAIL: CONTACT@ERPHUB.COM
-  ADDRESS: 1925 ST CLAIR AVE #202, CLEVELAND, OH 44114
-  WEBSITE: WWW.ERPHUB.COM