



Zoho CRM Implementation Practices by Industry

NGO

Consolidating donor, volunteer, and program data that otherwise lives in department-siloed spreadsheets.

Custom Modules & Fields

- Custom modules/fields for donation history, engagement level, events attended, donor tier (major donor, monthly giver, event attendee)
- Grant records with restricted-fund tracking where the organization has reporting obligations to funders/board/regulator

Key Workflows & Automation

- Form submissions (donations, volunteer sign-ups) route directly into CRM records with no manual re-entry
- Automated thank-you and donation-reminder emails; renewal automation for recurring gifts
- Grant agreement routing: signed agreements (Zoho Sign) attach to the grant record automatically
- Deadline notifications pushed to Cliq/email for reporting obligations

Integrations & Compliance Notes

- Zoho Forms and Zoho Subscriptions for donation/sign-up capture and recurring giving
- Zoho Campaigns for donor engagement and segmented outreach
- Zoho Flow to connect CRM, Sign, and payment/donation platforms
- Zoho Analytics for program and fund-utilization reporting