



Zoho CRM Implementation Practices by Industry

Zoho CRM Automation

Practices that generally precede and follow module customization, regardless of vertical.

Custom Modules & Fields

- Pre-customization: review the client's actual business process before touching setup
- Review industry-specific terminology so the CRM speaks the client's language, not generic 'Leads/Deals'
- Select only the fields and modules the business genuinely needs — resist replicating every default module

Key Workflows & Automation

- Blueprints for any process with defined stages, approvals, and handoffs (onboarding, claims, loan sanction, etc.)
- Workflow rules for routing, alerts, and follow-up automation so records don't stall waiting on a manual handoff
- Approval processes wherever a discount, credit, or exception needs sign-off before proceeding
- Assignment rules to route new records to the right owner/team automatically

Integrations & Compliance Notes

- Zoho Flow as the connective layer between CRM and everything that isn't CRM or Books (forms, e-signature, notifications)
- Zoho Analytics for the reporting layer once data is flowing cleanly
- Data migration: clean and map data (CSV or otherwise) before import; test with a small batch first
- Testing and training built into the rollout, not treated as an afterthought