



G-Cloud 15 | SERVICE DEFINITION

Lot 2 Cloud Software

Framework reference: RM1557.15



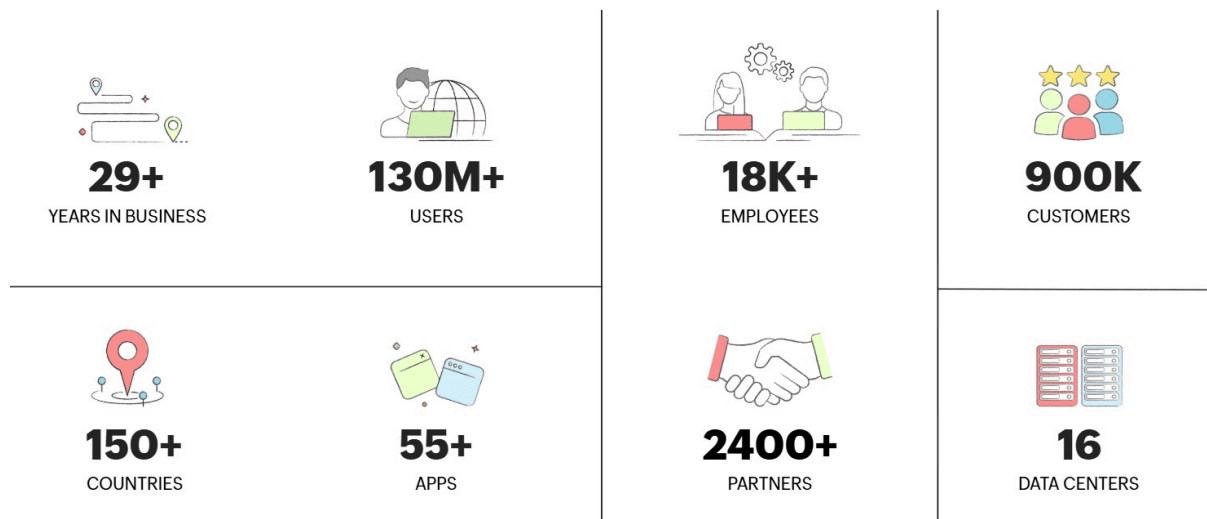
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1. Introduction

Company Overview

Founded in 1996, Zoho Corporation Limited is a fast growing and profitable organisation developing software for a wide-range of private and public sector industries. The 'Zoho brand' itself was introduced in 2005 after the company experienced tremendous growth and interest in its suite of emerging online applications, and it now has over 55+ cloud based applications. Zoho has emerged as a leading player in online productivity, collaboration and business applications. The company has achieved consistent revenue growth (averaging about 35% a year) over the past 25 years without ever seeking outside investment capital.



Now with 18000 employees and offices on five continents, Zoho has more than 900,000 customers worldwide spanning over 180 countries. Zoho has its global headquarters in Chennai, India and corporate headquarters in Texas, US with offices in the United Kingdom, North America, South America, Europe, Asia, Australia, and partners worldwide. With a profitable business model and a heavy emphasis on R&D (more than 70% of employees are in engineering and development), Zoho will continue to develop new applications and evolve its existing applications to meet demand.

Zoho Corporation Limited has grown from a small founding team into a global cloud software provider through organic growth and sustained investment in engineering and product development. The company operates as a privately owned business without external venture capital funding and follows a long-term operating model rather than a short-term exit strategy.

Zoho Corporation Limited is debt-free and financially self-sustaining, supporting continued investment in its workforce, security, and service delivery capabilities. The company has experience delivering software solutions across a range of sectors, including government, financial services, telecommunications, manufacturing, real estate, and logistics.

Solutions offering

Zoho CRM Plus is a unified customer-experience platform that helps the buyers deliver an exceptional experience to sales, marketing and customer service teams by providing a 360 degree view of customer information. The Zoho suite of applications caters to Customer Relationship Management (Zoho CRM), campaigns management (Zoho Campaigns), automate marketing Activities (Zoho Marketing Automation), personalise websites and optimize conversion (Zoho PageSense), visitor tracking (Zoho SalesIQ), project collaboration (Zoho Projects), manage virtual meetings and webinars (Zoho Webinars), customer service and call centre management (Zoho Desk), feedback management (Zoho Survey), event management (Zoho Backstage), social medial management and integrations (Zoho Social), marketing project management (Brand Studio), marketing project specific file management (Brand Assets), communication platform (Zoho Cliq) and analytical platform (Zoho Analytics). The application will bring the teams of buyers on a single interface and provides intuitive features to streamline operations of acquiring and managing leads, managing customer information, managing the product and services portfolio, automate the business and customer service processes and boost the team's productivity by utilising the analytics and AI capabilities.

Zoho suite of applications provides strong platform capabilities that will enable the buyers to leverage the following:

- Omni-channel communication platform
- Empower sales, marketing and service teams with a 360-degree customer experience
- Achieve higher tiers of satisfaction with personalised customer engagement
- Reach out to the right prospects with marketing automation
- Automate business processes, routines and tasks using Blueprint
- Create intuitive interfaces and enhance visual experience using Canvas design studio
- Deeper level of analytics and insights with 80+ built-in reports
- Measure performances and improve ROI from digital campaigns
- Seamless integration and migration from existing applications
- Deliver exceptional service to customer

The platform includes sales automation, exclusive email client for sales team, customer service desk management, marketing automation, social media integrations, customer feedback management, activity management and monitoring key performance metrics and KPIs.

Key Differentiator of our Service – Zoho CRM Plus

Zoho with its integrated suite of applications has a comprehensive list of functional differentiators,

- **Customer/Citizen Centric** - It provides a comprehensive, end-to-end view of citizens and service users across their interactions with the organisation, including engagement, communications, and service delivery. This allows frontline and back-office teams to access accurate and up-to-date citizen

information from a single, secure platform, supporting more efficient, transparent, and responsive public services.

- **Omnichannel Engagement** - The unified customer engagement platform will allow public sector departments to interact with citizens, suppliers, and partners across multiple channels, including online portals and forms, telephone, email, and digital communication platforms. This approach ensures a consistent and joined-up service experience across departments, supporting improved collaboration, service delivery, and accessibility while enhancing the overall citizen experience across all channels.
- **Unified Team Communication** - Provides flexibility to public sector services teams to collaborate securely and in real time, supporting effective coordination across departments and functions. The solution provides a shared, centralised view of citizen and service-user information, ensuring authorised staff have access to consistent and up-to-date data. Real-time messaging and collaboration tools support joined-up working, helping to deliver a consistent and efficient service before, during, and after each interaction
- **Canvas Design Studio** - The Canvas feature in Zoho CRM will enable the buyer to create intuitive, pleasant and minimalistic customer dashboard using simple drag and drop capabilities and enhance visual presentations of data within CRM. Canvas also offers a library of templates that are crafted by designers to custom fit based on needs of buyer for a better look and feel.
- **Simple, yet powerful Process and Workflow management** - Zoho offers comprehensive applications to automate the business processes, while keeping the administration of these processes very easy. Zoho Blueprint feature offers a drag and drop UI for creating a start to finish process, whether it is processing of lead or logging cases for service requests. At each step, buyer can enforce compliance by making sure the right data is entered at each point, and even guide users on what they need to do at each stop by providing configurable directions and guide them on next best actions to take.

Automated actions can also be configured to send out notifications, push and pull data from buyer's systems or other external systems.

- **Unified Analytics** - Zoho Analytics helps the public sector teams to consolidate data from multiple systems into a single, secure repository. This allows organisations to obtain a complete and consistent view of service, operational, and user activity without the need for custom development. The platform supports the creation of standardised and ad-hoc reports and dashboards, enabling analysis across areas such as service usage, regional activity, operational performance, workloads, targets, and outcomes. These insights support evidence-based decision-making, performance monitoring, and continuous improvement. Zoho Analytics helps government organisations transform data into actionable intelligence, supporting transparency, accountability, and improved public service delivery.
- **Zia - AI-driven service assistant** - Zia, an intelligent AI driven assistant designed to support users by providing intelligent insights, recommendations, and automation across operational and service workflows. Zia analyses system activity and historical data to help users prioritise tasks, identify patterns, and anticipate next actions, improving efficiency and consistency in day-to-day work. It can suggest automated updates, highlight anomalies, and surface relevant information at the point of need, reducing manual effort and the risk of error. Zia is accessible directly within the platform, enabling staff to retrieve information, receive guidance, and automate routine activities in real time, supporting improved service delivery and informed decision-making across government operations
- **Data Security and Compliance** - Zoho suite of applications has multiple layers of protection and defence with high grade security, monitoring techniques and network security systems that employs the latest encryption, intrusion detection and prevention technologies.

Values and goals

Zoho pioneers with strong experience in implementing and integrating customer engagement tools for various sectors. We focus on building a strong and long term strategic relationship with customers across the globe. By leveraging Zoho's suite of services, government and public sector organisations in the UK can address their IT challenges more effectively, optimise their operations, and ultimately deliver better services to citizens. Here is how,

- **Customisation:** Zoho CRM Plus can be customised to suit the specific needs of government organisations. This flexibility allows them to tailor the software to fit their unique processes and workflows.
- **Integration:** Zoho CRM Plus integrates seamlessly with other Zoho applications as well as third-party software commonly used in government organisations. This allows for a cohesive ecosystem where data can flow smoothly between different departments and systems.
- **Data Security and Compliance:** Zoho CRM Plus adheres to strict security standards, ensuring that sensitive government data is protected at all times. It also helps organisations comply with regulations such as GDPR, HIPAA, and others.
- **360-Degree View of Constituents:** With Zoho CRM Plus, government organisations can maintain a comprehensive view of their constituents, including citizens, businesses, and other stakeholders. This enables better communication, engagement, and service delivery.
- **Workflow Automation:** Automating repetitive tasks and processes can save government organisations time and resources. Zoho CRM Plus offers robust workflow automation capabilities, allowing organisations to streamline their operations and improve efficiency.
- **Analytics and Reporting:** Zoho CRM Plus provides powerful analytics and reporting tools that enable government organisations to gain insights into their operations, track key performance indicators, and make data-driven decisions.

- **Citizen Engagement:** Zoho CRM Plus can be used to engage citizens through various channels such as email, social media, and online forms. This enables government organisations to gather feedback, disseminate information, and provide services more effectively.
- **Mobile Accessibility:** With application specific mobile apps available for iOS and Android devices, enables government employees to access critical information and perform tasks from anywhere, ensuring productivity even when they are on the go.
- **Cost-Effectiveness:** Zoho CRM Plus offers competitive pricing plans tailored to the needs of government organisations, making it a cost-effective solution compared to custom-built software or other CRM platforms.
- **Scalability:** Whether a government organisation is small or large, Zoho CRM Plus can scale to accommodate its needs. This scalability ensures that the software can grow alongside the organisation and continue to meet its requirements in the long term

Overall, Zoho CRM Plus provides government organisations and public sectors with a comprehensive solution for managing relationships, improving efficiency, and delivering better services to citizens.

Product Introduction

What it does

Zoho CRM Plus is a cloud-hosted customer relationship and engagement platform delivered as a Software-as-a-Service (SaaS). It provides a unified environment to manage:

- customer and stakeholder data
- omnichannel communications (email, live chat, social and web)
- case and enquiry tracking
- automated workflows, approvals and SLA enforcement
- analytics and reporting dashboards
- collaboration and task management

All components operate from a central, searchable record, reducing fragmentation and improving process consistency across teams and service channels.

This service is designed to be secure, scalable and accessible, with data residency options in UK/EU regions.

How it helps

Zoho CRM Plus helps organisations simplify service delivery and improve outcomes by:

- **Reducing complexity:** consolidating multiple point solutions into one platform, eliminating manual handovers, duplicated data and inconsistent customer experience.
- **Driving efficiency:** automated processes and intelligent routing reduce response times and operational workload.

- **Supporting evidence-based decisions:** built-in analytics and reports provide visibility of performance, demand patterns and service outcomes.
- **Improving stakeholder experience:** consistent, omnichannel engagement helps users interact in their preferred way, improving satisfaction and accessibility.
- **Enabling governance:** audit trails, role-based access controls and compliance reporting help organisations meet data protection, security and procurement standards.

The platform supports service continuity, and its configuration-driven approach means agencies can tailor behaviour without custom code or costly professional services.

Who might benefit?

Zoho CRM Plus is suited to public sector organisations that need a secure, scalable platform to manage complex enquiries, stakeholder engagement, casework and customer experience. Typical buyers include:

- Central government departments and executive agencies
- Local authorities, combined authorities and metro mayors
- NHS bodies, integrated care systems and health trusts
- Educational institutions and skills authorities
- Housing associations and public service delivery organisations
- Regulatory and arms-length bodies with high volume interactions

The service is especially beneficial for organisations seeking to:

- Replace multiple legacy or siloed systems
- Improve cross-team collaboration and data consistency
- Align service delivery with performance reporting and compliance

- Support digital transformation at scale without heavy custom development

List of benefits

- Improved service delivery for citizens and service users
- Reduced administrative burden for government departments
- Increased transparency and performance reporting
- Improved data quality and information governance
- Faster handling of enquiries, cases and service requests
- Better collaboration across government departments and public sector bodies
- Scalable and adaptable service delivery
- Strong support for data protection and regulatory compliance

Further details of each benefit:

Improved service delivery for citizens and service users

Zoho CRM Plus enables government departments to manage enquiries, cases, and interactions across multiple channels from a single system, supporting consistent and accessible service delivery.

How this helps departments achieve their goals:

Citizens, residents, patients, students, tenants, and businesses receive clearer communication, faster responses, and a more joined-up experience across public services.

Reduced administrative burden for government departments

The platform consolidates multiple systems into a single service and automates routine processes such as triage, routing, and updates.

How this helps departments achieve their goals:

Civil servants and public sector teams spend less time on manual administration and system reconciliation, allowing more focus on policy delivery and frontline services.

Increased transparency and performance reporting

Built-in analytics and dashboards provide real-time visibility of demand, workload, response times, and service outcomes.

How this helps departments achieve their goals:

Senior responsible owners, service managers, and policy teams gain reliable evidence to support governance, audit, and ministerial reporting.

Improved data quality and information governance

Zoho CRM Plus provides a controlled system of record with validation rules, audit trails, and role-based access controls.

How this helps departments achieve their goals:

Information is accurate, consistent, and appropriately protected, supporting data protection obligations, records management, and operational assurance.

Faster handling of enquiries, cases and service requests

Automated workflows, prioritisation rules, and SLA tracking ensure work is routed and progressed efficiently.

How this helps departments achieve their goals:

Departments can reduce backlogs, meet service standards more reliably, and manage fluctuating demand without increasing staff numbers.

Better collaboration across government departments and public sector bodies

Shared records, task management, and controlled internal communication enable joined-up working across teams and delivery partners.

How this helps departments achieve their goals:

Cross-cutting services and policy delivery are easier to coordinate, reducing duplication and improving outcomes across departmental boundaries.

Scalable and adaptable service delivery

The platform is configuration-driven, allowing processes and data models to evolve in response to policy, legislative, or operational change.

How this helps departments achieve their goals:

Departments can adapt services over time without re-procurement or costly redevelopment, supporting long-term digital transformation.

Strong support for data protection and regulatory compliance

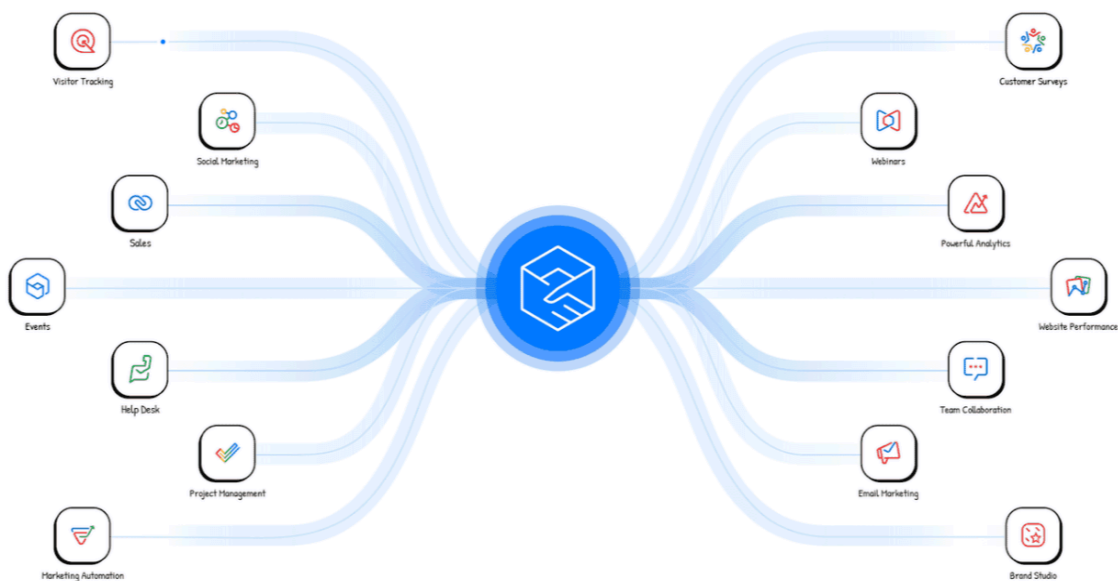
Zoho CRM Plus includes security controls, encryption, audit logging, and data residency options aligned with UK public sector requirements.

How this helps departments achieve their goals:

Departments can manage sensitive information responsibly, reduce operational risk, and demonstrate compliance with relevant legislation and standards.

Associated Services and Features

Zoho CRM Plus is a unified customer experience platform that helps you deliver an exceptional experience to every citizens across all stages of their lifecycle and convert them into brand advocates. Zoho CRM Plus enables the Sales, Marketing, Support, and every other customer-facing team to deliver exceptional customer experience. The services included in Zoho CRM Plus bundle are detailed below in this section.



Features include

- Amalgamates interactions, casework and communications across government public service environments:** The service brings together interactions, casework and communications into a single operational platform that can be used across multiple public service functions. Enquiries, service requests and ongoing cases are linked to a single record, enabling departments to manage activity consistently even where services span

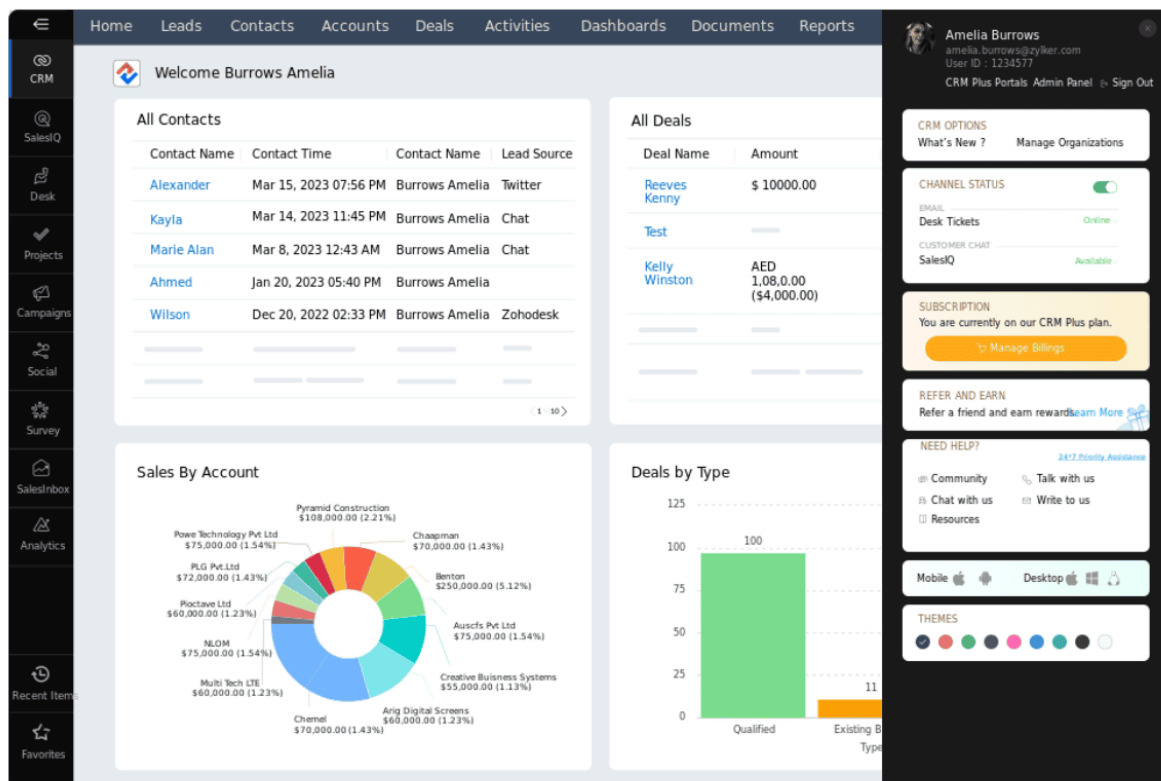
multiple teams or delivery models. This reduces fragmentation between systems and supports a joined-up view of public service activity.

- Instant dashboard displays for service performance metrics, compliance and decision-making:** The platform provides configurable dashboards that present real-time information on service activity, workload, response times and outcomes. These dashboards draw directly from live service data and can be tailored for operational, management or assurance purposes. This enables timely oversight of performance and supports compliance monitoring and evidence-based decision-making without reliance on manual reporting.
- Streamlines routine processes, approvals and follow-ups to reduce administrative workload:** Routine service processes such as triage, approvals, follow-ups and escalations can be configured and automated within the system. This ensures work progresses in line with defined service rules while reducing manual handling and duplication. Automation supports consistency across service delivery and helps departments manage demand more efficiently.
- Manages email, phone, web-chat and webform enquiries within one system:** The service captures and manages enquiries from multiple communication channels within a single interface. All inbound and outbound communications are recorded against the relevant case or service record, providing a complete interaction history regardless of channel. This supports consistent handling of enquiries and reduces the risk of missed or duplicated responses.
- Strict configurable access governance controls to store and process datasets:** Access to data is governed through configurable, role-based controls that define who can view, create, update or manage information. Audit logging records access and changes to data, supporting accountability and assurance. These controls enable departments to manage sensitive datasets appropriately and align data handling with governance and data protection requirements.
- Citizen engagement functionality with full auditability of all service communications:** The platform supports structured engagement with citizens

and service users, with all communications automatically logged and time-stamped. Messages, responses and updates are retained as part of the service record, providing full traceability. This supports transparency, complaints handling, regulatory oversight and public accountability.

- Structured handling of service requests, issues and multi-stakeholder interactions:** Service requests and issues can be categorised, prioritised and progressed through defined stages, including where multiple teams or stakeholders are involved. Ownership, status and responsibilities are clearly recorded throughout the lifecycle of the request. This structure supports control over complex casework and reduces delays caused by unclear hand-offs.
- Cohesive cross-platform integrations supporting disconnected teams and fragmented system data flows:** The service supports integration with existing platforms and systems using standard interfaces and APIs. This enables departments to connect data flows across teams and systems without requiring immediate replacement of legacy applications. Integration supports continuity of service while reducing data silos over time.
- Mobile-friendly integrations supporting field working and live citizen engagement:** The platform is accessible through secure, mobile-friendly interfaces that support use on a range of devices. This enables staff working outside office environments to access and update service information in real time. Mobile access supports timely data capture and improves responsiveness during field-based activity.
- Identifies patterns, anomalies and trends enabling faster evidence-based decisions:** Built-in analytics capabilities analyse service data to identify trends, exceptions and emerging patterns. This supports early identification of risks, changes in demand or performance issues. Departments can use these insights to inform service improvements and respond more quickly to emerging issues.
- Unified Interface and Search:** Zoho CRM Plus provides a central user panel where administrators can efficiently manage all portals, user access, and

subscription details in one location. Customer service agents can monitor and control their ticketing and live chat channel statuses, marking themselves as online, offline, or busy to ensure smooth and intelligent assignment of incoming tickets and customer interactions.



Quickly locate information across all modules and tools within Zoho CRM Plus through a single search interface. Simply enter a customer name, email, or keyword, and the system retrieves relevant records instantly. Provides a comprehensive, cross-application search across CRM, Desk, Projects, and other connected modules. Eliminates time spent navigating multiple systems, ensuring faster access to accurate customer information.

CRM • Q Sarah | MODULES: All Module

Full Name	Company	Lead Owner	Annual Revenue
Van Horn Sarah	Temple Aliyah Inc	Amelia Burrows	\$0.00
Allen Sarah	Breakfasy Cafe on Bo...	Amelia Burrows	\$0.00
Soriano Vansenia	Breakfasy Cafe on Bo...	Revers Quinn	\$0.00
McHale Sarah	The Oaks School	Amelia Burrows	\$0.00

Contacts

Contact Owner	Account Name	Email	Phone	Full Name
Amelia Burrows	McHale Sarah	Sarahturnert@gmail.com	800-555-5296	Turner Sarah
Amelia Burrows	Van Horn Sarah	Sarah.marshallblink@gmail.com	800-555-0115	James Maria
Amelia Burrows	Allen Sarah	Contact@enderavorsmachine.org.uk		Sarah

Tasks

Task Owner	Subject	Due Date	Contact Name	Related To	Status	Priority
Natasha	Follow up with new lead	Feb 22 2023		Candish Sarah	Not Started	High
Rao Raghavv	Set - up a call with contac	Feb 29 2023	Turnet Sarah	Sarah Jolie	Deferred	Medium
Rivers Quinn	Follow up	Mar 14 2023	Turnet Sarah	Vansenia Sarah	Deferred	Low

- 360 degree Customer view:** The system provides a single, integrated view of each service user or organisation, combining communications, case records, digital interactions, internal notes, assigned staff, support tickets, and feedback in one place. An AI-driven assistant helps improve data quality by enriching records from authorised public sources, reducing manual data entry and supporting more accurate, efficient service delivery.

Amelia Burrows
Best time to Contact - Today
6:30 PM★ in 18 minutes

Open Activity

Subject	Activity Type	Status
Follow up call	Tasks	Not Started
Email Follow up	Tasks	Not Started

Stage History

Subject	Amount	Probability(%)
Closed won	\$75,000.00	100
Contract sent	\$80,000.00	95

Zoho Desk

All Tickets	Overdue Tickets	Avg Response Time
10	1	0.03Hrs

Contributed Campaigns

Campaign Name	Type	Date
Explore Zylker	Regular	Feb, 3 2023
Unify your teams	Regular	Jan, 3 2023
Newsletter	Regular	Feb, 8 2023

Notes

Can someone call this customer tomorrow
Deal: [Amelia burrows](#) Add Note Jan 9

Deal Information

Deal Owner	Amelia Burrows	Amount	\$80,000.00	Lead Source	Cold Call
Deal Name	Dan Michael	Closing Date	Jan 8, 2023	Revenue	\$80,000.00
Account Name	Ventura Tech	Stage	Closed Won	Probability(%)	100

- Omni-channel Engagement:** Zoho CRM Plus brings together all customer interaction channels including phone, email, live chat, surveys, and social media into a single, unified platform. It supports teams to manage calls, chats, emails, and digital interactions from one interface without switching between tools, while providing full visibility of customer history and past interactions. This ensures seamless, contextual communication, allowing agents to respond quickly and effectively, maintain continuity across engagements, and improve overall service quality and customer satisfaction.

Telephony

Dan Michael
Calling...

ANSWER

Dan Michael
Ventura Tech

Open Deal

Deal Owner: Amelia Burrows
Stage: Proposal Quote
Expected Revenue: _____

Social

Zylker Travels
Tuesday, January 28-11:30 PM

Zylker Travel's Post
10 Safest Destination for solo Female Travelers
The Blonde Abroad <http://bit.ly/2P8RYN>

Email

Email Status

Sent

In the last 2 days

and status is

☒ opened
☐ not opened
☐ bounced

Chat

Amelia

Amelia

Hey, Samuel! How can i help you?

Samuel

Hi Amelia, I'm facing a problem with booking tickets in your website

Amelia

Would you be able to attend a remote session now?

Type your message and hit Enter

Core Modules

1. Zoho Customer Relationship Management (CRM)

Customer Relationship Management (CRM), part of the Zoho CRM Plus bundle delivers an exceptional experience to every citizen and internal team by providing a 360 degree view of information for key stakeholders. Zoho CRM provides intuitive features to streamline operations such as managing customer/citizen information, digital marketing, automation of standard processes, advanced AI capabilities along with advanced analytics to boost productivity.

The solution also offers powerful interoperability with third party systems to deliver notifications, sync data, trigger automated processes and even adapt a user's experience with contextual information from orders, to contracts and marketing communication. It also provides flexibility for teams to collaborate in real time and have a holistic view of citizen information all in one integrated place.

Zoho CRM will help departments to achieve its primary objectives of a unified system to manage citizen data repository and build a seamless business process which is scalable, futuristic and offers best-in-class services to their customers.

Key capabilities of Zoho CRM

- Omni-channel communication platform
- Foster strong citizen relationships
- Empower internal teams with 360-degree citizen experience
- Achieve higher tiers of satisfaction with personalized customer engagement
- Automate sales routines and support tasks with Blueprint
- Measure performances and improve ROI
- Create intuitive interfaces and enhance visual experience

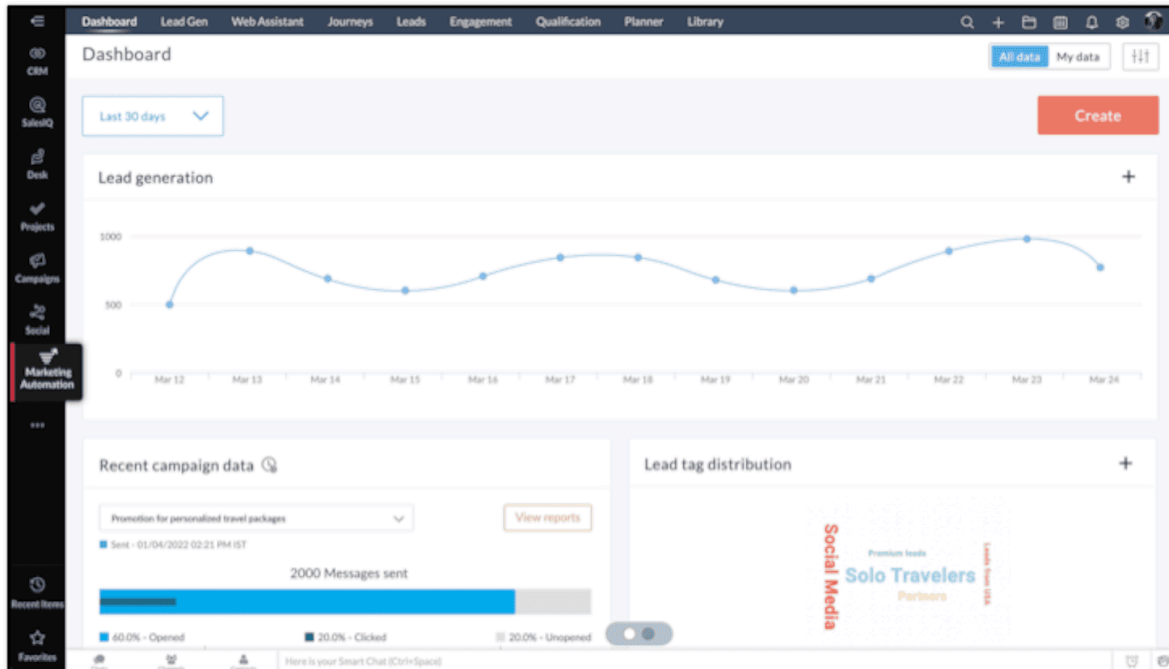
- Seamless integration and migration from existing applications
- Full range of integrated mobile apps
- Deliver exceptional service to customers

2. Zoho Marketing Automation

Marketing Automation, part of Zoho CRM Plus bundle is a multichannel platform that will enable buyers to ease the marketing process and generate sales ready leads. Marketing Automation will provide a holistic picture to buyers for the marketing activities right from allocating the marketing budget to planning campaigns to measuring performance metrics via the marketing planner. It provides a centralised place to set goals, add marketing activities, assign them to collaborators and plan the entire marketing operation from the planner. Marketing Automation will enable the entire marketing team of the customers to see all the campaigns, events, projects and other marketing activities.

Zoho Marketing Automation will help buyers to build its audience, run targeted email campaigns, and increase its reach through,

- Email Campaigns
- SMS and Whatsapp Campaigns
- Dashboard
- Customer Journey
- Templates
- Social and Advanced Campaigns
- Real-time Analytics



3. Zoho Desk

Zoho Desk, part of CRM Plus is the industry's first context-aware help desk software that helps departments focus on the citizen. The important piece of desk management is the crucial information that all stakeholders in customer service require (agents, support managers and customers) to deliver or receive great support.

Key capabilities of Zoho Desk:

- Helping customers find answers instantly through self-service
- Aggregating and helping manage conversations from multiple channels
- Providing service team with crucial customer context
- Enabling leaders to manage processes, fix bottlenecks, and create efficiency at scale
- Omnichannel customer service software to delight and retain customers
- Manage support and customer service without a glitch

4. Zoho Survey

Zoho Survey, part of Zoho CRM Plus bundle provides a slew of features that enables Clients to achieve the best in terms of both research and feedback based on the product and services. Zoho Survey was launched to cater to the growing needs of the survey market. Zoho Survey helps to communicate with a diverse audience across various segments. It helps for effective feedback mechanism via surveys, created by using over 25 question types and 250 multi-lingual survey templates, customised themes, integrations and branding.

Key capabilities of Zoho Survey:

- Create secure online surveys using GDPR compliance
- Provides logic conditions to define how respondents move through questions
- Analyse responses using Sentiment and Text analysis
- 250+ pre-defined templates to craft surveys
- Personalise survey to reflect own remarkable style
- Customisable reports help you visualise response trends and make informed decisions
- Integration with connects apps
- SSL certified and private

The screenshot displays the Zoho Survey Editor interface. On the left is a sidebar with various question types: Multiple Choice (Radio Button), Multiple Choice (Checkbox), Dropdown, Image Type, Rating Scale, Star Rating, NPS, Slider Scale, Ranking, Matrix Choice (Radio Button), Matrix Choice (Checkbox), Matrix Rating Scale, Matrix Star Rating, Matrix Dropdown, Single Line, Multiple Lines, Numeric, Email, and Full Name. The main area shows a preview of a survey titled 'SANDY'S SALON SURVEY' with a 'Page 1' indicator and a 'Logic' icon. The survey content includes three questions:

- Q1. How did you find out about Sandy's Salon?
 - ☐ Search
 - ☐ Website
 - ☐ Friends
 - ☐ Advertisements
- Q2. How do you rate our service?
 - ☆☆☆☆☆
- Q3. What was your first impression of Sandy's Salon?
 - ☐ Very Good

5. Zoho Social

Zoho Social, part of Zoho CRM Plus bundle, is the social media management software to analyse the social media performance and improve the 'brand' value. It also helps to schedule posts, monitor the trend, hashtags, posts, comments and responses, create custom reports across all the social media platforms like Facebook, Twitter, LinkedIn, Google My Business and Instagram.

Key capabilities of Zoho Social:

- Schedule posts based on flexible time
- Visualise the content pipelines with intuitive publishing mechanism
- Real time engagement with the audience
- Best in class analytics
- Monitor with core keywords, brand hashtags, product reviews
- Provides seamless integrations
- Offers collaborative tools

The screenshot displays a social media interface. On the left, a tweet from 'Zylker Travels - Your Holiday Planning Destination @ZylkerTravels' is shown, dated 15 Aug 2022 02:35 PM. The tweet text is 'It's a hard blog life: How to make it as a #TravelBlogger buff.ly/2scptJI Via @IrisTimesBiz'. Below the tweet, a reply from 'Charles @charles' is visible, dated 26 Aug 2022 02:44 PM, with the text 'Awesome'. Above the tweet, a notification states: 'This is the first time Charles has engaged with Zylker Travels. Charles has 102 followers and is following 67 people. Know more about Charles.' Below this notification are buttons for 'Follow', '+ Add to CRM', and 'Discuss'. On the right, a 'Live Stream' section lists several interactions: '@Charles replied to your tweet' (26 Aug 2022 02:44 PM), '@mikesanthy retweeted your tweet.' (25 Aug 2022 at 9:12 AM), 'Alan Bryson commented on your wall post' (25 Aug 2022 at 9:10 AM, with a 'Contact' button), '@johnmatthews started following you.' (24 Aug 2022 at 4:43 AM), '@KevinChieff started following you.' (24 Aug 2022 at 4:00 AM), '@Andrea liked your post.' (23 Aug 2022 at 10:46 PM), 'Tony Karrer commented on your post.' (23 Aug 2022 at 08:18 PM, with a 'Lead' button), and '@Andrea liked your post.' (23 Aug 2022 at 10:46 PM).

6. Zoho Projects

Zoho Projects, part of Zoho CRM Plus bundle is a comprehensive and cloud-based project management software that's helps to plan the projects, track work efficiently, and collaborate with your team, across multiple branches/locations of your organisation. Projects is a comprehensive solution that will help to solve day-to-day problems in project management and add value to their business by leaps and bounds, by creating project management efficiencies, portfolio management efficiencies, data collection, tracking and reporting for the organisation.

Zoho Projects provides an initiative and easy to use interface that will enable the project management team to plan its Programs and Projects, closely track its tasks, collaborate with teams efficiently and finish successful projects with ease. Zoho Projects is an enterprise-ready tool that is highly scalable and secure.

Key capabilities of Zoho Projects:

- Effectively plan the projects
- Build the plans using Gantt charts

- Provides intuitive user interface
- Effective collaboration between team
- Automate task process
- Prioritisation of tasks
- Resource allocations
- Hybrid models

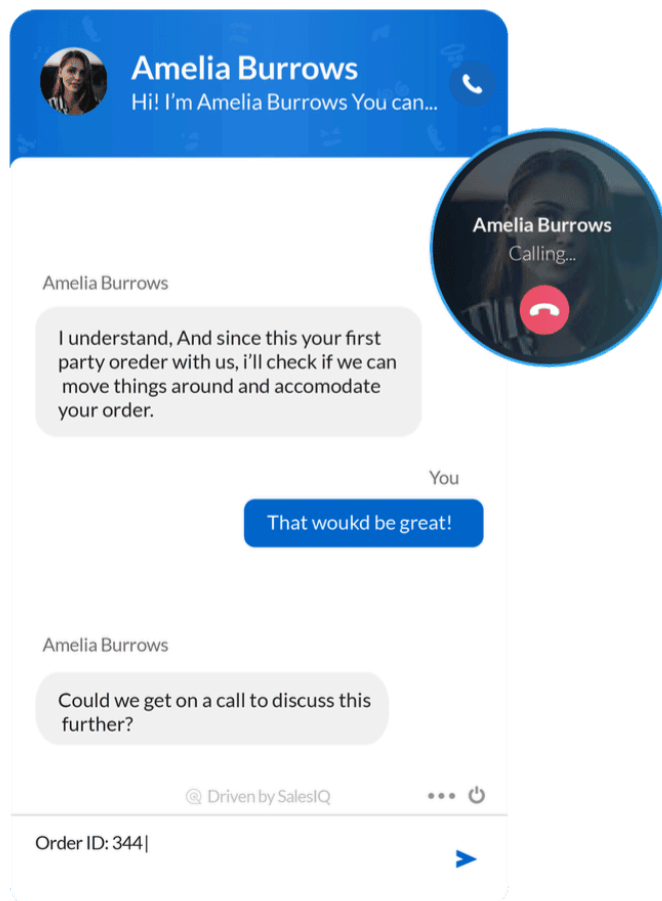
7. Zoho SalesIQ

Zoho SalesIQ, part of Zoho CRM Plus bundle offers the marketing, sales, and support teams the digital customer engagement tools to communicate with every site visitor at every stage of the customer lifecycle. This all-in-one live chat and analytics platform promotes proactive customer engagement, allows the team to initiate the right kind of conversation at exactly the right time. It helps to engage every prospect that visits the website, sets up automated triggers for different scenarios to initiate a chat with visitors at exactly the right moment, strike up a conversation with prospects by sending a message or showing a custom banner based on their areas of interest and how much time they've spent on the company web pages.

Key capabilities of Zoho SalesIQ:

- Website Visitor Insights
- Helps with lead scoring
- Create intuitive codeless bots
- Omni-channel mode of Communication
- Offer data and action-based widgets
- Streamline visitor engagement and support with automation
- Streamline the customer support using integration with CRM and Desk

- Leverage team's strength with collaborations
- Track critical KPIs and metrics for improvements
- Dive deep into stats with Zoho Analytics



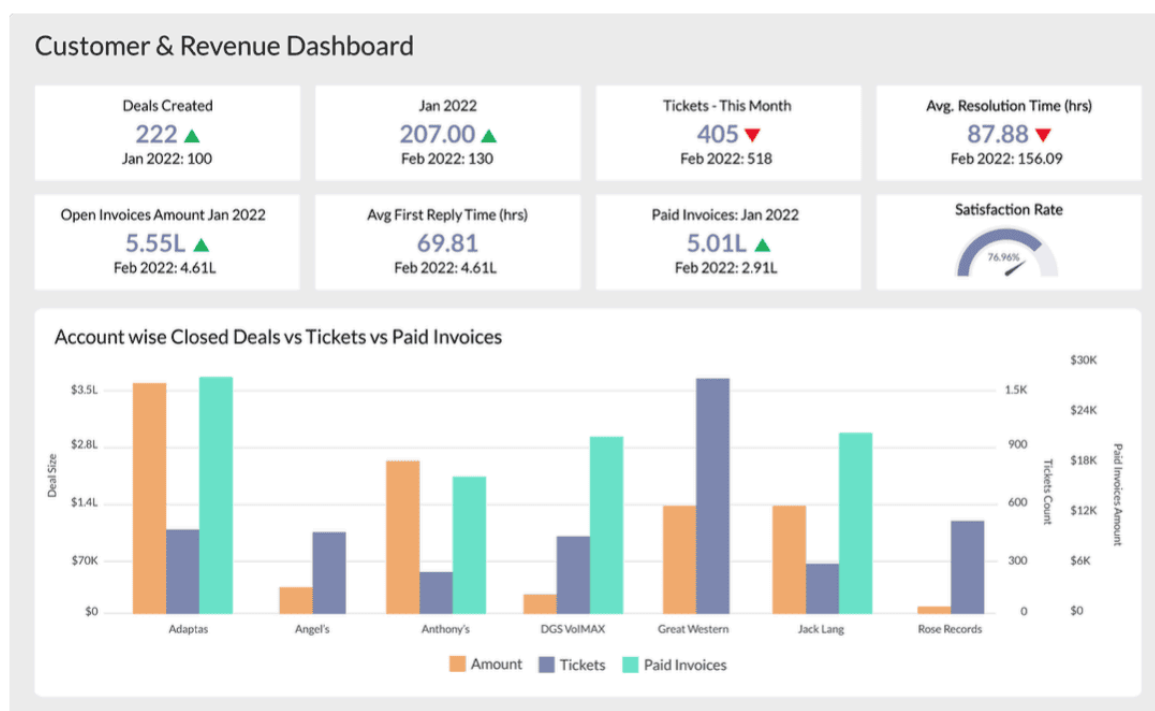
8. Zoho Analytics

Zoho Analytics, part of Zoho CRM Plus bundle is a self-service BI and data analytics application that lets you visually analyse your data, create stunning data visualisations and discover hidden insights in minutes. Zoho Analytics turns raw data into insightful reports and dashboards and helps to track key business metrics, review trends, identify outliers and predict the future. According to TEC's latest report "2021 TEC INSIGHT REPORT FOR BI AND ANALYTICS SOLUTIONS", Zoho Analytics has been ranked among the leaders in the competitive BI and Analytics space, leading in various categories like analytics functions, data visualisation and

discovery, dashboards, scorecards and reporting, UX and Security features. TEC says, “From an UX perspective, we can see that Zoho Analytics leads across all aspects of user experience (UX) examined in this survey, from technical to licensing.”

Key capabilities of Zoho Analytics:

- Connect and blend data from any source
- Prepare data for analysis
- Augment analysis using AI
- Visually analyse the data
- Cloud and On-premise BI solution
- Share insight with stakeholders
- Unified and Embedded BI
- High Scale and extensible platform
- Highly secured

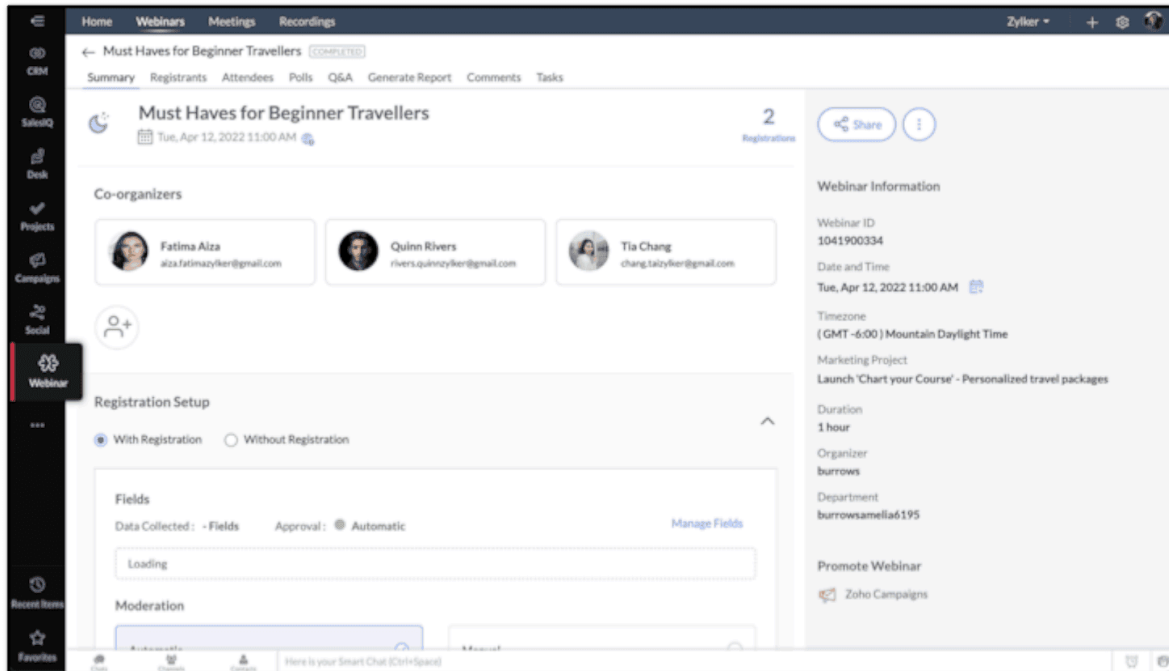


9. Zoho Webinar

Zoho Webinar, part of Zoho CRM Plus bundle, is a secure online meeting platform and webinar solution that helps people find new ways to collaborate and work remotely with efficacy. Enhance your remote collaboration experience with our highly secure online meeting software. Zoho Webinar is committed to protecting your data and privacy while you conduct online meetings and Webinars using audio, video, and screen sharing.

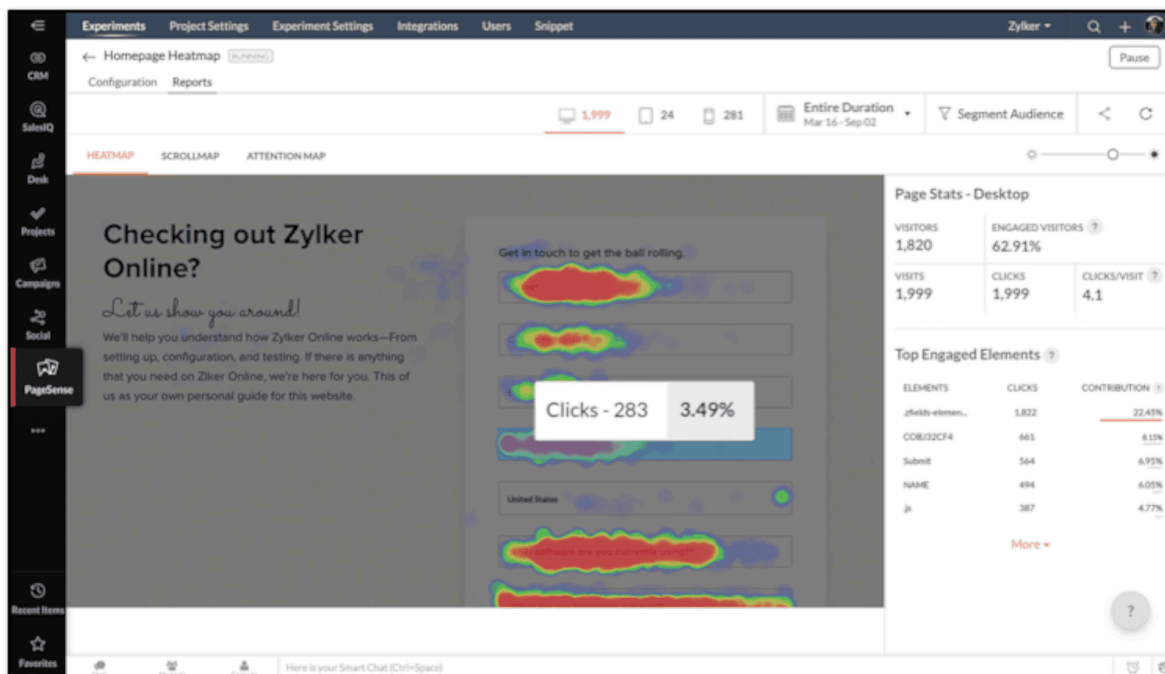
Key capabilities of Zoho Webinar:

- Schedule a meeting, or meet instantly
- Collaborate with video conferencing and screen sharing
- Send invitations with RSVP
- Embed meeting links on your website
- Add meetings to your calendar and get reminders
- Play, share, and download recordings
- Lock meetings for security
- Communicate through chat
- Industrial standard security
- Conduct Video Meetings
- Webinar Solutions
- Webinar Data and Downloads
- Embedded meeting widget
- Firefox extension and Google Chrome extension



10. Zoho PageSense

Zoho PageSense, part of Zoho CRM Plus bundle, is a conversion optimisation and personalisation platform that helps you optimise your website, personalise pages to suit your target audience, and boost overall conversion rate. With features like Funnel Analysis, Form Analytics, Heatmap, Session Recording, A/B Testing, and Personalisation, you can precisely understand what works on your website, what causes drop-offs, and optimise it for better conversions.

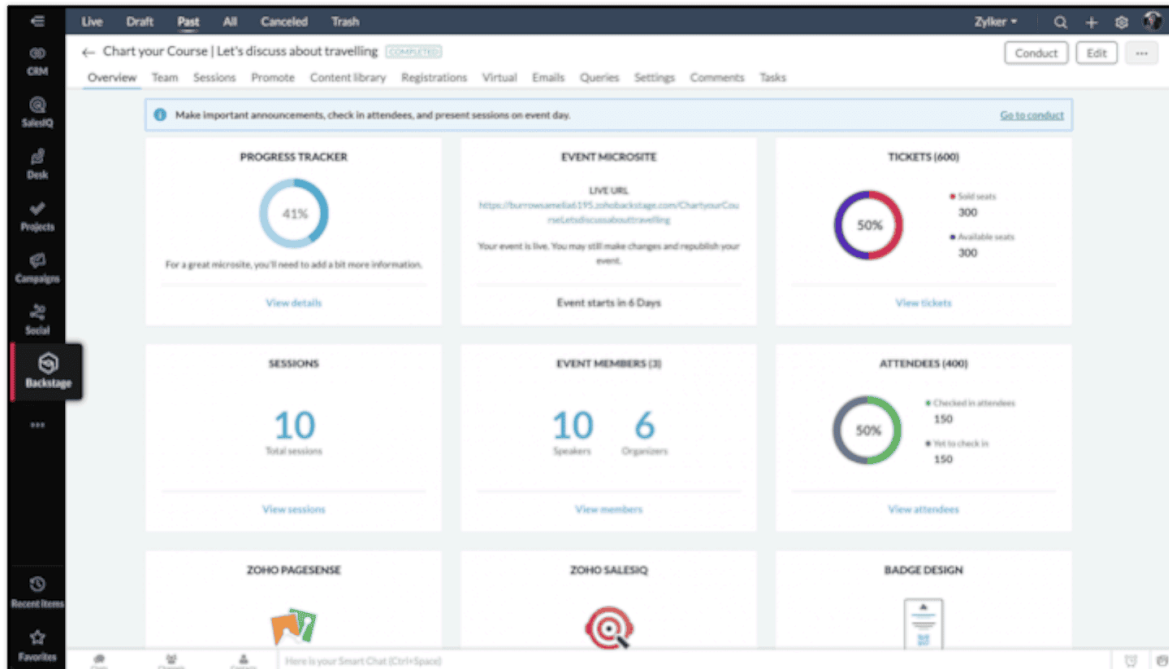


11. Zoho Workdrive

Zoho WorkDrive, part of Zoho CRM Plus bundle, is an online file management and collaboration platform for teams and individuals.

12. Zoho Backstage

Zoho Backstage is a part of Zoho CRM Plus, an enterprise event management tool used to help you create memorable event experiences. It's everything you need, from website creation, ticketing, and event promotion, to attendee registration and engagement. Zoho Backstage helps you organise the following types of events: Onsite, in-person and hybrid events.



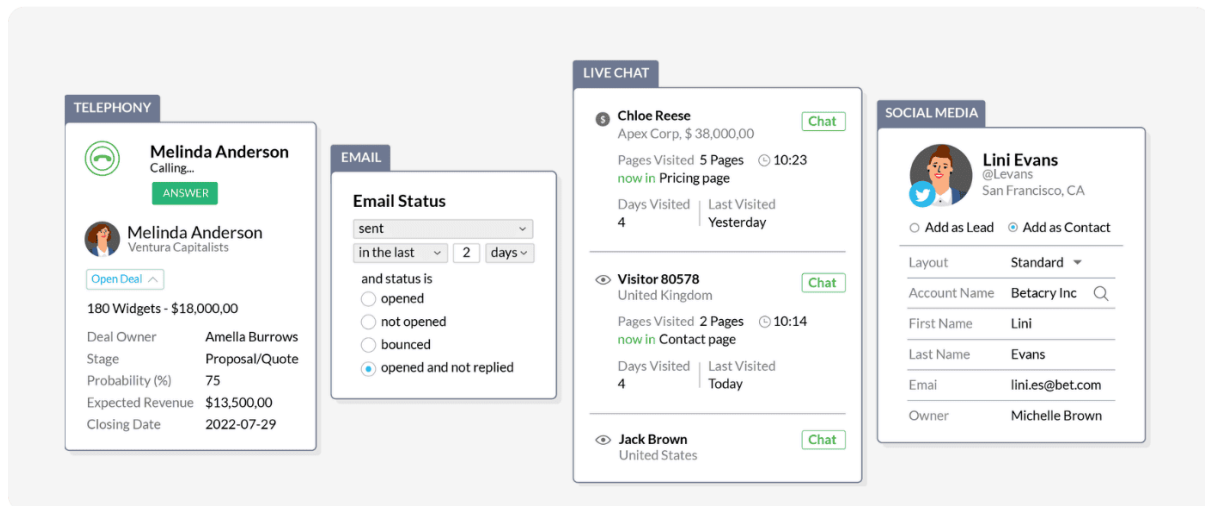
13. Zoho Campaign

Zoho Campaign, part of Zoho CRM Plus bundle is an email marketing platform designed to help businesses create, send, and track email campaigns effectively. It offers a user-friendly interface with customisable templates, drag-and-drop editors, and automation tools, making it easy for users to design engaging emails without needing extensive technical expertise. With features such as subscriber management, A/B testing, analytics, and integration with other Zoho apps.

Email

Survey

Webinar



14. Brand Studio

Brand Studio, is a part of Zoho CRM Plus bundle, is a centralised workplace for a brand where all its marketing activities can be created and managed such as email campaigns, social media posts, surveys, webinars, SMS campaigns, blogs, and trade-shows can be created for a marketing project. A complete timeline of all the activities that are part of a marketing project will be available to give you a clear picture of what needs to be executed next.

Key capabilities of Zoho Brand Studio:

- Marketing project management
- Task management
- Managing Resources
- Marketing activity planner
- Discussions
- Brand-level Budget
- Campaign-level Budget
- Budget Monitor

- Spend Analysis and summary

15.Zoho Cliq

Zoho Cliq, part of Zoho CRM Plus bundle, is a web-mobile based chat and messaging software that gives the ability to have a direct chat, audio call, file sharing, screen sharing, video call with other users or with several users/members in a chat room or channel within the organisation. Zoho Cliq simplifies your team communication with organised conversations, easy-to-find information, and connections to the tools at ease.

Key capabilities of Zoho Cliq:

- Group collaboration made simple
- Increase in transparency and visibility
- Team calls in one-tap
- Centralise the workflows
- Check-in to work through Cliq
- Instant virtual meetings
- Share ideas on whiteboard
- Team mobility with screen sharing
- Stay better connected with team
- Foster effective team collaboration

2. Data Protection

Information Assurance

Zoho Corporation operates a formal information security and privacy assurance framework aligned to recognised international standards. This includes certification to ISO/IEC 27001 for information security management and ISO/IEC 27701 for privacy information management, alongside ISO/IEC 27017 and ISO/IEC 27018 for cloud security and protection of personal data in public cloud environments.

Security controls are independently audited through SOC 2 Type II assessments, covering the design and operating effectiveness of controls over security, availability, and confidentiality. Zoho also maintains UK Cyber Essentials Plus certification.

Customer data is protected using encryption in transit and at rest. Data in transit is secured using TLS 1.2/1.3 with Perfect Forward Secrecy. Sensitive data at rest is encrypted using AES-256, with cryptographic key management handled through Zoho-managed key management services.

Data Backup, Data Restoration and Disaster Recovery

Zoho operates defined backup and restoration processes to support data protection and recovery. This includes daily incremental backups and weekly full backups, with automated tracking and integrity validation. Backup data is stored using resilient storage mechanisms designed to reduce the risk of data loss.

For disaster recovery, Zoho operates geographically separated data centre capability, with primary and secondary data centres within regional boundaries (for example, within Europe). Data replication between sites supports service continuity in the event of infrastructure failure, with recovery processes designed to minimise service disruption.

Business continuity statement / plan

Maintaining Operations

Zoho maintains a business continuity management approach aligned to ISO 22301. Continuity planning covers infrastructure, service delivery, and operational support functions to ensure services can continue during disruptive events.

Operational continuity is supported through redundant infrastructure, alternative data centre availability, and defined procedures for maintaining service operations during incidents. Business continuity arrangements are designed to support continued access to services while recovery activities are undertaken.

Availability and Resilience

Service availability and resilience are supported through a combination of redundant infrastructure, multi-site deployment, and secure network architecture. Encryption controls protect data confidentiality during normal operations and during incident scenarios.

Zoho provides transparency on service availability and incidents through a publicly accessible service status platform. Planned maintenance activities and unplanned service events are communicated to support operational awareness and service management.

Privacy by Design

Zoho applies privacy-by-design and privacy-by-default principles across its services. Personal data processing aligns with UK GDPR and EU GDPR requirements, including lawful processing, purpose limitation, data minimisation, and security of processing.

Zoho acts as a data processor for customer service data and provides a Data Processing Addendum (DPA) to support contractual GDPR obligations. Breach notification processes align with statutory requirements, including notification to relevant controllers without undue delay.

Access to personal data is restricted to authorised personnel with a legitimate operational need, supported by role-based controls and audit logging. Data

retention and deletion controls support customer instructions and regulatory obligations.

3. Using the service

Ordering and Invoicing

The paid subscription of Zoho CRM Plus can be availed from Zoho Corporation Limited by contacting our team (sales@eu.zohocorp.com) to discuss your requirements in detail. They will guide you through the ordering process and provide any necessary assistance in completing the Order Form (Call-off contract). We accept payment via Visa, MasterCard, American Express, and PayPal. We also accept payment via bank transfer or check transfer for yearly subscriptions. We strive to make the ordering and invoicing process as smooth as possible, ensuring that you have a clear understanding of the fees and payment terms.

Availability of Trial Service (what is included and what is excluded)

- CRM for Salesforce Automation
- Campaigns for sending email campaigns
- Desk for managing your support helpdesk
- SalesIQ for website visitor tracking
- Social for managing your social media handles
- Projects for team collaboration
- Survey for collecting customer feedback
- Marketing Automation for automating marketing activities
- Backstage for planning, promoting, and executing events
- PageSense for tracking and analysing your website performance and visitor behaviour

- Webinar platform for hosting meetings and webinars
- Analytics for running business reports
- Cliq for Collaboration and
- Workdrive for file management

At the end of your 30-day trial, you can either purchase a subscription plan or deactivate your account.

1. If you purchase a CRM Plus subscription, your data and configurations remain intact and you can continue using CRM Plus.

2. If you deactivate your CRM Plus account, you can still access the free plan of Zoho CRM Plus' individual applications except CRM and SalesIQ where you can go back to the edition that you previously used before signing up for the trial version of Zoho CRM Plus.

Training

Zoho CRM Plus offers various training facilities to help users get started and make the most of the service. The training facilities include online help and assistance, which provide users with access to comprehensive documentation, tutorials, and guides. These resources are designed to facilitate orientation to the new service and help users understand its features and functionalities. Additionally, Zoho CRM Plus may provide introductory or onboarding services to further support users during the initial stages of using the service. These services may include personalised training sessions, on-site visits, or dedicated support from a customer success manager. The goal is to ensure that users have the necessary training and support to utilise Zoho CRM Plus effectively.

Implementation Plan

Zoho will coordinate with the buyer for the integration and onboarding of Zoho CRM Plus. Features of our delivery methodology:



- Collaborative session to define the scope and requirements such that the objectives are well stated and prioritised
- Model that encourages flexibility, continuous learning and cross training
- Collaborative approach between Zoho and buyer teams
- Multiple opportunities to provide feedback to the solution
- Adherence to meeting schedules and timely feedback to queries

Discovery Phase

The implementation team will collaborate along with buyer's key stakeholders or point of contacts to elicit the requirements, understand the process, identify and define the ecosystem and dependencies, prioritise the objectives based on goals and plans. The key objectives of this activity would be to gain a detailed understanding of the following

- Core objectives and the priorities
- Understanding of the ecosystem
- Understanding of the short term and long term priorities
- Understanding of the dependencies
- Plan for the integration and onboarding
- Plan for support

Service Management

We have a dedicated incident management team. We notify you of the incidents in our environment that apply to you, along with suitable actions that you may need to take. We track and close the incidents with appropriate corrective actions. Whenever applicable, we will identify, collect, acquire and provide you with necessary evidence in the form of application and audit logs regarding incidents that apply to you. Furthermore, we implement controls to prevent recurrence of similar situations.

We respond to the security or privacy incidents you report to us through incidents@zohocorp.com, with high priority. For general incidents, we will notify users through our blogs, forums, and social media. For incidents specific to an individual user or an organisation, we will notify the concerned party through email (using their primary email address of the organisation administrator registered with us).

Service Constraints

Zoho CRM Plus is hosted on Zoho's public cloud and cannot be hosted On-Premise

Service Levels

Customer Interaction Flow:

- Customer will reach the Support Team via support Call/ chat/ email and create ticket.
- Request will be validated and maintained in Zoho Desk. Based on the type (feature request/issues/backend changes) it is actioned accordingly.
- Issues requiring developer attention will be debugged by SDE (Support Debug Engineer) team.

- The SDE owner will debug the issue further and revert with the reason and the solution will be conveyed to the customer by support engineer. The severity level of the issues will be categorised as below:
 - **Severity Level 1:** The Zoho Service does not function without a fix being applied and the problem has significant effect on the revenues or business operations of Subscriber.
 - **Severity Level 2:** The Zoho Service can function. However, the Zoho Service functions providing incorrect results, or its performance is inconsistent with the performance described in the Documentation.
 - **Severity Level 3:** The functionality of the Zoho Service is not affected by the problem or can be achieved by using other features of the Zoho Service.

Escalation Procedure:

Our dedicated classic support team is available 8 hours per day (UK Time), 5 days per week. Response, Problem Determination and Resolution/Restoration/Work-around Timeframe

Security level	Response	Problem Determination	Resolution/ Restoration/ Work-around
1	1 hour	1 hour	8 hours
2	8 hours	8 hours	4 days
3	24 hours	24 hours	14 days

Outage and Maintenance Management

Planned Outages and Maintenance:

Planned outages will be announced/informed to the customers through several channels,

- Blog post in community forum
- Business emails
- Banners in respective services

Generally, annual maintenance activities would be planned during non-business hours to avoid impact to the services.

Unplanned Outages:

Major unplanned outages will be posted in social media forums and also will be informed to customers through emails. Customers can always refer to the following link on the health status of each service and update on outages.
<https://status.zoho.eu/>

Financial Recompense Model for not Meeting Service Levels

At Zoho, we understand the importance of meeting service levels and ensuring customer satisfaction. We are committed to delivering a high-quality service and addressing any issues promptly. If there are concerns about service levels not being met, we encourage customers to contact our exclusive support team, who works round the clock to discuss the situation and find a suitable resolution. Our goal is to work closely with our customers to ensure their needs are met and provide the best possible service experience. However, in the event of a service default from our end, upon detailed analysis, customers will be compensated with Service Credits.

Monthly Uptime Commitment: On-Demand Services will have a Monthly Uptime Percentage of 99.9%.

Calculation of Service Credit and Compensation for Downtime

(No of days of Service Credit)

Uptime 99.5% to 99.9% :	7
99% to 99.5%:	15
<99% :	30

Request for Service Credit: In order to receive any of the Service Credits described above, Subscriber must notify Zoho within thirty (30) days from the time Subscriber becomes eligible to receive a Service Credit. Failure to comply with this requirement will result in forfeiture of Subscriber's right to receive a Service Credit. Maximum Service Credit. The aggregate maximum number of Service Credits to be issued by Zoho to Subscriber for any and all Downtime Periods that occur in a single calendar month shall not exceed thirty days of Service added to the end of subscription term. Service Credits may not be exchanged for, or converted to, monetary compensation. Sole and Exclusive Remedy. Subscriber's sole and exclusive remedy for Zoho's failure to meet the uptime commitment is to receive Service Credit.

SLA Exclusions: The SLA does not apply to any performance and availability issues: (i) caused by factors outside of Zoho's reasonable control; (ii) that resulted from any actions or inactions of Subscriber; or (iii) that resulted from Subscriber's equipment and/or third party equipment that are not within Zoho's reasonable control. It is hereby clarified that performance and availability issues caused by factors within Zoho's control and attributable to Zoho or its vendors are not excluded.

Terms:

- "Downtime" shall mean inability to access On-Demand Services due to a Qualifying Fault. Downtime is measured based on availability of the individual On-Demand Services as measured by Zoho's application monitoring tool.
- "Qualifying Fault" shall mean and include server side errors and reachability errors attributable to On- Demand Services.
- "Downtime Period" shall mean ten or more consecutive minutes of Downtime. Intermittent Downtime for a period of less than ten minutes will not be counted towards any Downtime Periods.
- "Monthly Uptime" shall mean total number of minutes in a calendar month minus the number of minutes of Downtime suffered from all Downtime Periods in a calendar month.
- "Monthly Uptime Percentage" shall mean the percentage calculated by dividing Monthly Uptime by the total number of minutes in a calendar month.
- "Scheduled Downtime" shall mean unavailability of On-Demand Services about which Subscriber is informed at least forty eight (48) hours in advance. A Schedule Downtime will not constitute a Qualifying Fault.
- "Service Credit" shall mean days added to the end of the Subscription Period at no additional cost as compensation for Zoho's failure to meet the monthly uptime commitment.

4. Provision of the service

Customer Responsibilities

- Choose a unique, strong password and protect it.
- Use multi-factor authentication
- Use the latest browser versions, mobile OS and updated mobile applications to ensure they are patched against vulnerabilities and to use latest security features
- Exercise reasonable precautions while sharing data from our cloud environment.
- Classify your information into personal or sensitive and label them accordingly.
- Monitor devices linked to your account, active web sessions, and third-party access to spot anomalies in activities on your account and manage roles and privileges to your account.
- Be aware of phishing and malware threats by looking out for unfamiliar emails, websites, and links that may exploit your sensitive information by impersonating Zoho or other services you trust.
- From your end, we strongly recommend scheduling regular backups of your data by exporting them from the respective Zoho services and storing it locally in your infrastructure.

Technical Requirements and Client-Side Requirements

System Requirements

Zoho CRM Plus is compatible with basic system configuration, the details of which are listed below-

Operating System	Windows, Linux and Mac OS X
Web Browser	Safari 13 & above, Google Chrome 73 & above, Mozilla Firefox 69 & above, Microsoft Edge 79 & above, Opera 60 & above
Other Requirements	Enable JavaScript, Cookies Install Acrobat Reader (Optional), Install Zoho Spreadsheet Viewer (Optional)

Outcomes/Deliverables

Implementing Zoho CRM Plus supports a range of operational outcomes and delivers defined capabilities that enable government departments and public sector bodies to manage service interactions, casework, and stakeholder engagement more effectively.

- **Centralised service and stakeholder records**

Zoho CRM Plus consolidates service user, stakeholder and interaction data into a single, controlled system of record. This ensures that relevant information is accessible to authorised users, supporting consistency, accuracy and continuity across service delivery.

- **Improved management of enquiries and service requests**

The platform enables structured handling of enquiries, cases and service requests throughout their lifecycle. This includes capturing requests, prioritising work, tracking progress and recording outcomes, supporting more reliable and transparent service delivery.

- **Enhanced engagement across service channels**

Zoho CRM Plus supports engagement with citizens, service users,

businesses and other stakeholders across multiple channels, including email, web, and digital interaction points. This enables departments to communicate consistently, maintain a complete interaction history, and improve the accessibility of public services.

- **Process automation and workflow control**

Configurable automation is used to streamline routine tasks, approvals and follow-ups. This reduces manual handling, improves process consistency, and ensures that service activity aligns with defined policies and governance requirements.

- **Reporting, insight and operational visibility**

The service provides reporting and analytics capabilities that support visibility of service demand, workload, performance and outcomes. These insights enable departments to monitor performance, identify trends and support evidence-based service improvement and decision-making.

- **Integrated service support and case management**

Zoho CRM Plus supports integrated handling of service enquiries and issues, including ticketing, knowledge resources and self-service options where appropriate. This enables timely responses, consistent handling and improved traceability of service activity.

- **Cross-team collaboration and information sharing**

The platform supports collaboration across teams and service areas by providing shared records, task management and controlled information access. This reduces silos and supports joined-up working across departmental boundaries.

- **Scalability and configurability**

Zoho CRM Plus is configurable to reflect departmental processes and can scale to support changes in service scope, demand or policy over time. This allows departments to adapt services without requiring system replacement or extensive redevelopment.

Implementation of Zoho CRM Plus supports improved operational efficiency, more consistent service delivery, and enhanced management of service interactions and casework. The outcomes achieved will depend on departmental objectives, service context, and the scope of configuration applied during implementation.

Zoho CRM Plus is supported by comprehensive documentation and learning resources, including user guides, administrator guidance, recorded webinars, and training materials. These resources are available to support onboarding, system administration, and ongoing use, enabling departments to build internal capability and reduce reliance on external support.

Development life cycle of the solution

Zoho CRM Plus follows a structured development life cycle that combines iterative and planned delivery approaches to support service stability, security, and continuous improvement.

Planning and roadmap management

Product enhancements are planned through an ongoing roadmap process informed by service usage patterns, regulatory requirements, operational feedback, and technical analysis. Roadmap planning is designed to balance innovation with service continuity and backward compatibility.

Design and development

Changes are designed and implemented following defined engineering standards. This includes architecture design, user interface considerations, configuration impact assessment, and implementation of functional changes. Security and privacy considerations are assessed as part of the design and development process.

Testing and validation

All changes undergo multiple stages of testing prior to release. This includes automated testing, internal validation, and quality assurance checks to confirm functionality, performance, and compatibility. Validation activities are designed to reduce the risk of service disruption.

Release management

Releases are controlled through a defined release process that includes final security checks and deployment approval. Release information is documented and communicated to users through release notes and service updates. Changes are introduced in a way that minimises impact on live services.

Operational support and continuous improvement

Following release, operational support teams monitor service behaviour and respond to reported issues. Feedback from service use is reviewed and, where appropriate, informs future improvements. This supports continuous service enhancement without compromising operational stability.

Cross-functional governance

The development life cycle is supported by collaboration between engineering, security, privacy, and operational teams to ensure that changes are aligned with service requirements, security controls, and data protection obligations.

After-sales account management

Zoho CRM Plus is supported by defined service management and support arrangements to ensure continuity of service, effective communication, and ongoing operational assurance throughout the service period.

Service relationship management

Zoho maintains structured communication channels to support ongoing service delivery. This includes proactive engagement to address service-related queries, operational issues, and service changes, ensuring clear and transparent communication with departmental users and administrators.

Service quality and user feedback

Service performance and quality are monitored throughout the service lifecycle. Feedback from users and administrators is reviewed and used to inform service improvements and support activities, helping to maintain service reliability and usability over time.

Operational health checks

Periodic health checks are undertaken to review service performance, availability, and utilisation. These checks support early identification of issues and help ensure that the service continues to operate in line with agreed expectations.

Service updates and change communication

Users are notified of product updates, enhancements, and security-related changes through defined communication channels. This supports operational awareness and enables departments to plan for and assess the impact of changes.

Contract and subscription management

Administrative notifications are provided in advance of contract or subscription renewal dates to support continuity of service. Renewal processes are handled through established commercial arrangements, ensuring there is no unplanned interruption to service access.

Termination Process

Customers may terminate their Agreement for cause : (i) upon 30 days written notice to the other party of a material breach if such breach remains uncured at the expiration of such period, or

(ii) if the other party becomes the subject of a petition in bankruptcy or any other proceeding relating to insolvency, receivership, liquidation or assignment for the benefit of the creditors. Upon termination for cause by customer, Zoho shall refund Subscriber any prepaid fees covering the unused portion of the Subscription Period. Upon any termination for cause by Zoho, Subscriber shall expedite all payments due to Zoho and in no event will termination of this Agreement relieve Subscriber of its obligation to pay any fees due to Zoho. Upon termination of the Agreement, Zoho will make all Subscriber Zoho Confidential MSA Data available to Subscriber for electronic retrieval for a period of thirty (30) days in a suitable format supported by On-Demand Services, after which Zoho may permanently and irrevocably destroy all Subscriber Data in its possession or control.

5. Social Value

Zoho's social value commitments focus on delivering long-term social, environmental, and economic value alongside the provision of cloud services to government departments.

These commitments are embedded in how Zoho designs, hosts, and operates its services rather than being delivered as standalone initiatives. Key commitments include reducing environmental impact through energy-efficient infrastructure and renewable energy use; supporting skills development, inclusion, and fair employment practices; and contributing to sustainable economic growth through long-term investment, ethical governance, and responsible supply chain management.

Zoho's approach to social value is aligned with recognised UK government priorities, including net zero ambitions, inclusive growth, workforce wellbeing, and ethical business practices. Progress is supported through internal governance, certification, and continuous improvement rather than short-term or project-specific activity.

Social, environmental, and economic benefits of working with Zoho

Social benefits

Zoho supports social value through inclusive employment practices, skills development, and workforce wellbeing. Zoho operates on a long-term, sustainable employment model, investing heavily in training and development to build skills internally rather than relying on short-term contracting models.

Initiatives include structured learning programmes, equal opportunity hiring practices, and support for workforce wellbeing, including mental health and family-friendly policies. This contributes to stable employment, skills retention, and knowledge continuity, which benefits public sector buyers through consistent service delivery and reduced supplier risk.

Zoho's approach to data protection, transparency, and auditability also supports public trust by enabling government departments to deliver accountable, citizen-facing digital services.

Environmental benefits

Zoho is committed to reducing the environmental impact of its operations and supporting public sector net zero objectives. This includes the use of energy-efficient data centres, renewable energy generation, and monitoring of emissions associated with service delivery.

Zoho operates renewable energy initiatives, including solar power generation, and works with data centre providers that adhere to recognised environmental and sustainability standards. Operational practices focus on reducing energy consumption, minimising waste, and improving resource efficiency.

For government departments, this contributes to lower carbon digital service delivery and supports reporting against environmental and sustainability commitments without requiring additional operational overhead.

Economic benefits

Zoho follows a sustainable, long-term business model that prioritises organic growth, financial stability, and continued investment in research and development. The company is privately owned, debt-free, and does not rely on short-term external funding, reducing commercial and continuity risk for public sector buyers.

Economic value is also delivered through predictable pricing models, reduced reliance on complex system integrators, and a broad in-house product portfolio that limits the need for multiple suppliers. This helps departments manage costs more effectively over the life of a contract and reduces the risk associated with supplier dependency and market volatility.

Zoho's ethical governance, compliance with labour standards, and responsible procurement practices further support sustainable economic outcomes across its supply chain.

6. Contact Details

Corie Robinson - Public Sector Manager

Email: enquiries-gcloud@eu.zohocorp.com

Phone: +44 2038072092