



Zoho Implementation and Licenses

G-Cloud 15 Service Definition Document

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Contents

1	Deloitte Overview	1
2	Service Overview	3
3	Detailed Service Description	5
4	Contact Details	5

1 Deloitte Overview

As a leader in professional services, Deloitte LLP is committed to making an impact to our clients, our people and for society. We have over 27,000 staff based across the UK providing audit, risk advisory, tax, consulting, financial advisory and legal services to public and private clients across multiple industries. We work together to build trust, support inclusive growth, and build capability, enabled by our **breadth and depth of expertise across advisory, delivery, engineering and managed services.**

Our **public sector practice** serves Central Government, Government Agencies, Local & Regional Government, Defence, Security and Justice, Health and Social Care, Transport, Education and Housing. We also provide services to the Northern Ireland Office, Scottish Government, Welsh Government and Crown Dependencies.

Our Cloud Capability

At Deloitte, we help our clients **Imagine, Deliver and Run** the businesses of the future through the power of **Cloud**. We have deep Cloud architecture, engineering, operational, commercial, and business transformation expertise delivered by a team of more than 26,000 Cloud Practitioners globally. We have delivered over 2,000 cloud implementations over the past 5 years and have 60+ cloud centres of excellence supporting the delivery of cloud services to our clients.

In the UK, we have a team of over 100 Cloud managed service specialists plus the following certifications across AWS, Microsoft Azure, Google Cloud and Oracle Cloud Infrastructure (OCI):



We help our clients with all aspects of their journey-to-cloud and optimisation of their cloud and cloud-services investments. Our Cloud practice can support you to optimise your client investments, and to navigate your organisations cloud journey, providing specialist cloud architecture, engineering, and operational skills at all stages, with a large proportion of our team holding the clearances required to meet your specific security requirements.

Our AI Capability

Deloitte stands at the forefront of AI transformation and was recognised as a Leader in the 2025 IDC MarketScape for Artificial Intelligence (AI) services for the fourth consecutive time. Supported by a £3 billion investment in AI, Data, Automation, Cloud, and Cyber, we seamlessly integrate our deep AI expertise with our extensive cloud capabilities. Our UK team is part of 339K AI-fluent practitioners globally, and includes over 1,300 AI specialists and engineers, many of whom hold the necessary security clearances for public sector delivery.

Through the Deloitte AI Institute, our hub for cutting-edge research and innovation, and strategic alliances with leading hyperscalers, we empower public sector clients to optimise costs, streamline processes, and navigate their AI journey. We achieve this by leveraging our ReadyAI™ models, which provide end-to-end support for AI solution implementation, and our Trustworthy AI™ framework, ensuring responsible and ethical deployment.

Our alliances & ecosystems

To bring full value to our clients, Deloitte is a premier consulting partner with all the leading hyper-scale cloud vendors in the market including AWS, Google, Microsoft¹ and SAP. A selection of our partners and alliances are presented below:



What the analysts say

Don't just take our word for it. Deloitte is recognised by the analyst community as being **leaders in cloud transformation services**. This reflects the wealth of experience we have in delivering cloud services across the public sector and wider private sector combined with our out-of-the-box templates, tools and assets.

Gartner

Originating in 2021, Deloitte has been recognised as a Leader in this category for four years in a row. Deloitte was also positioned as a Leader in the **Gartner Magic Quadrant for Public Cloud Infrastructure Professional and Managed Services, Worldwide** in 2021, 2020 and 2019, the previous form of this category.

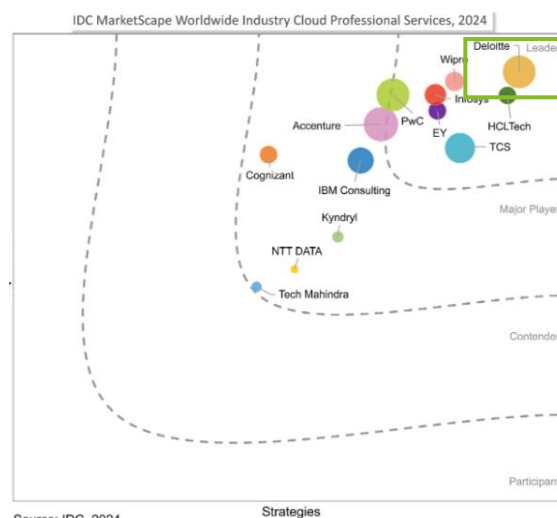


Gartner

Gartner: Magic Quadrant for Public Cloud IT Transformation Services. © Gartner inc. 2025

IDC

Deloitte has been awarded Leader status in the **IDC MarketScape: Worldwide Industry Cloud Professional Services 2024** Vendor Assessment. We have also been recognised as Leaders in **Hybrid IT Consulting & Integration Services** and **Software Engineering Services**.



IDC MarketScape: Worldwide Industry Cloud Professional Services Vendor Assessment © IDC inc. 2024

Cloud Transformation

Transform Faster, Transform Smarter

Deloitte's Cloud Transformation can fast-forward your journey to the Cloud, unlocking innovation, efficiency, and growth.

[Find out more here](#)

¹ As Microsoft's Independent Auditor, Deloitte cannot have a direct or material indirect business relationship with Microsoft, such as having an alliance or being a registered partner. Nonetheless, Deloitte can provide Microsoft-related technology services and invests heavily across its global business building technical skills and capabilities to develop world-class consulting and solution delivery capabilities.

2 Service Overview

Zoho is a global technology company with a SaaS suite of 55+ highly configurable and customisable applications that support business activities. This SaaS suite also includes leading low-code platforms that enable creation of custom applications and extensions. Deloitte are working with Zoho to bring our clients a unique proposition: innovative, flexible technology underpinned by 20+ years of software delivery expertise and deep industry knowledge.

Deloitte provide low-code Zoho discovery, design, implementation and support services to our clients. We can configure each application to meet bespoke requirements, making delivery simple, quick and flexible through Agile methodologies. Our services include requirements gathering, solution design, planning, configuration, development, discovery/optimisation, integrations, change management, testing, training, hypercare, release management and best-in-class support. We offer our clients one, some or all of these services on a modular basis, including reselling of Zoho licenses for ease of contracting.

The Zoho suite of applications is modular, meaning you can take one application to use or combine as many as needed. The applications integrate with your existing systems to enable information flow and drive alignment. The available applications cover a wide range of functionality, including but not limited to:

- Real-time advanced analytics with reporting, imports, exports, dashboards, visualisations and live data views
- Sales, pipeline and customer/supplier/partner/employee management
- Public consultation, surveying, outreach and marketing applications
- HR, people and recruitment applications and employee management tools
- Training, learning management and certification tools
- Finance and accounting, invoicing, billing, payments and subscription management
- Asset management, procurement, item, inventory, purchasing, shopping and ecommerce tools
- Knowledge/request/incident/change/complaints/claims management
- Document and information storage, sharing, database management
- Enhanced workflow, case management, automation and process management
- Contact centre, CRM, communication tracking, emailing and telephony solution integration
- Project, task, scheduling, software and programme management applications
- Web, form, survey and information collection page design and management
- Configurable and easy to use drag-and-drop tailoring of applications
- AI functionality and AI Agent builders bespoke to your use case
- APIs, development areas and low-code bespoke application builders

Zoho applications are used by 100 million+ people globally across a number of [clients](#) and sectors, and can bring government departments and smaller authorities a range of benefits when implemented effectively, for example:

- A highly configurable low-code modular suite of business applications which are templated for a variety of use cases; simple to implement & specific operational challenges can be resolved quickly and cost effectively

- Applications delivered by Deloitte who can add an additional layer of value and optimise solutions through vast industry knowledge and expertise in solution delivery
- Out-of-the-box integration between Zoho applications and other third-party apps, meaning apps can be plugged together to support optimised information flow between Zoho and your own systems, driving enhanced data insights
- AI and automation is embedded throughout the applications driving efficiencies in your processes and removing manual effort
- APIs and webhooks available for building integrations to other government department systems
- Simple to implement with rapid delivery timelines using a proven iterative agile development model
- Deloitte have knowledge of all applications, meaning we build and configure the right applications to meet bespoke requirements ensuring the solution works for you
- The apps have several built-in automation features which drive process efficiencies saving time and effort
- The apps are flexible and low code meaning they are self-serve for clients once live so clients can make changes themselves, reducing reliance on third parties and in turn Change Request (CR) costs
- Price-competitive licensing which includes cloud hosting, delivering a value solution for clients of all sizes
- Scalable to user, workflow and data volumes meaning ease of roll-out across departments or service lines
- Flexible and modular, meaning any number of applications can be implemented
- Deloitte provide ongoing first-line support and change management of applications as required

3 Detailed Service Description

Deloitte have deep technological expertise and have built, implemented and supported many different cloud solutions over the last 20 years. Our partnership with Zoho gives our clients access to over 55+ SaaS applications to support different business functions. The Zoho platform has over 100 million users worldwide and is used by many UK brands and organisations such as NHS trusts, local councils, JCB, Jaguar-Land Rover and ITV.

Our experienced delivery teams support our clients through Agile implementation of new solutions and our delivery model makes us a flexible and scalable Partner to work with. During an engagement we always have a focus on continuous improvement and process optimisation, meaning the solution we deliver works for you, rather than your teams having to work around a new technology.

Combined with our solution delivery expertise, Deloitte uniquely provide knowledge across all Zoho apps to define a digital strategy that is **best for the client**.

-  Zoho consulting and advisory expertise
-  Single point of contact for in-depth knowledge across Zoho
-  Reseller of all Zoho's 55+ core applications
-  Zoho marketplace with thousands of other applications
-  Delivery of tailored, ready-to-go versions of Zoho apps
-  Custom apps for development if required
-  Deployment expertise, management and ongoing support

The Applications

Zoho is a SaaS suite of 55+ highly configurable applications that support business activities and programmes of work. The suite gives you a complete set of tools to continuously improve efficiencies and work smarter. The suite is modular, meaning you can choose a single application, multiple applications, or you can choose Zoho One which has most of the applications in one product bundle delivering a connected operating system for businesses. The Zoho suite is made up of the following applications categories:

Category	Description
Outreach and case management	- Comprehensive Customer Relationship Management (CRM), help desk and marketing automation tools - Workflow and case management solutions including automation - Comprehensive set of sales tools to sell efficiently across channels - Customer/partner/supplier/student/member outreach and management - Social media, telephony, live chat, email and mobile outreach management - Portal functionality for contact and information collection
Publicising	- Multi-channel campaign and outreach management - Social media scheduling, monitoring and reporting - Information collection surveys and online forms - Website design, branding and build - Event management, planning and tracking - Collateral management and publishing - Automated outreach, workflows, notifications, actions and tasks
Support and requests	- Multi-channel service desk management, self-service portals and ticketing - Workflow and automation of repetitive actions e.g. request routing, SLAs - Incident, request, access, procurement, complaint and claims management - AI knowledge based chatbots to reduce query volumes

	• OCR functionality to drive efficiencies and automate repetitive tasks • Call centre integration and telephony management • Agent productivity and team performance management • FAQs, information pages and knowledge hubs • Remote support and remote access management
HR and people	• Recruitment management, onboarding and job advertising • OCR, CV sifting and offer letter management • Onboarding and offboarding • Application portals, status updates and automated candidate and vendor notifications • Workflow automation for reminders, notifications, tasks and SLAs • Employee profiles, information storing, expenses • Time, attendance, absence, and shift management • Employee social wall, request bots, portals and chat functions • Talent management, performance, goals, feedback and training
Remediation Management, Collections Management and Arrears Management	• Record management and processing • Data ingestion and data migration • Workflow and case processing • Customer and claimant outreach (letters, SMS, telephony, email) • Financial calculator and redress • Operational reporting and MI • Capacity and resource planning
Surveys	• Employee experience and culture surveys • Public consultation surveys • Communication management (emails, SMS, telephony) • Data analytics and reporting
Accounting and operations	• Invoice and billing management and accounting software • Subscription and purchasing management • Payment software and expense management • Financial reporting and modelling • Inventory, order, procurement and asset management
Custom requirements builders	• Low-code application development platform • Pre-built templates to cover thousands of business uses • Integration and workflow automation builder
Collaboration	• Project, programme and agile delivery management • Mailbox, meeting, messaging and collaboration management • Meeting, screen sharing and presentation management
Productivity	• Productivity application suite including worksheets, presentations etc. • Document storage and management solutions

	• eSignature and document signing solutions • Password management and storage • Notes and task list management
Analytics and reporting	• Empowering the business with insights, visual reports and dashboards • Connections to multiple data sources such as databases, files and apps • Data preparation and management to cleanse, transform, enrich, and catalogue the data

In addition to the features stated above, all applications also support:

- Notifications, alerts and dynamic system actions for users
- Ai, Ai Agent builder and automated actions
- Drag and drop configurability and page builders for ease of build and fast changes
- Granular user permissions, access and security controls
- Business intelligence and supporting analytics, reports and dashboards
- Integration capabilities either out of the box, via webhook, API, data feeds or code
- Mobile application versions out-of-the-box at no additional charge

The applications can be ‘plugged together’ through out of the box integrations, meaning they can be rapidly deployed to support wider use cases for example:

- **Entire HR function management:** The People Plus suite of integrated apps delivers an exceptional digital HR experience to your employees while managing the entire employee life cycle on a single integrated platform. From building great teams to empowering them and keeping them engaged, to managing requests and candidate pipelines, the solution can drive efficiencies in the entire end-to-end HR process.
- **Grants applications:** The customer portal can be configured to work with the workflow CRM tool, to provide a grant application and information space for applicants, and a processing case management tool for reviewing, checking and approving the applications. Analytics can be used to track fund spend, and campaigns can be used to support marketing and distribution of the grant or funding scheme.
- **Contact centre:** Integration with call centre technology facilitates end-to-end contact centre services which are omni-channel. The CRM provides a centralised customer view and all calls, messages and chats can be managed within it.
- **Survey/assessment:** Survey, Campaigns and Analytics functions can be used to outreach via several channels, and gather data and documents related to a specific theme e.g. employee culture. Self-serve dashboards are available for progress and response analysis.

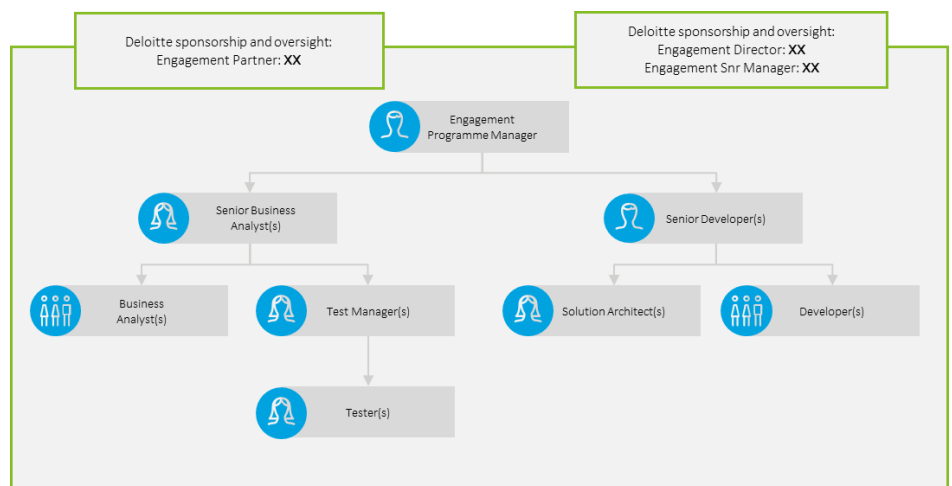
Implementation and Deliverables

In addition to reselling, Deloitte are implementation Partners of Zoho meaning that our teams are experienced and trained in software delivery and the Zoho applications. We have a breadth of knowledge across all applications and can suggest the best application combinations to fulfil your bespoke requirements. Our team works to a proven governance framework giving you confidence in our delivery. Our teams typically consist of a set structure which we scale up or down as needed. A typical implementation consists of:

- **Requirements and Design:** Gather and agree client’s requirements, plan and design the necessary steps for product development and configuration. During this phase a series of workshops with both teams will take place to

review the requirements and workflows, and to optimise the solution design for the client. This phase will also include the kick-off of the project where we will agree key milestones, communication strategies, reporting and escalation lines and the project plan.

- **Build and Configure:** Deliver the requirements using Agile methodology with a series of iterative pre-agreed sprints. Showcasing of deliverables in demos at the end of sprints, providing release notes after each iteration.
- **Test:** Test the requirements that have been delivered (throughout build). Testing of the solution will typically include system testing, integration testing, performance and load testing, unit testing.
- **User Acceptance Testing (UAT):** Client to test the platform and confirm that requirements match agreed scope. Any issues found during UAT are fixed by the delivery team.
- **Deploy and Training:** Release solution into live. Training for users and SMEs of the tool on the client's side to enable them to use the tool optimally ongoing and to reduce reliance on Deloitte for change requests and system tweaks. Train the trainer sessions held to enable those trained to train other people.
- **Handover and Hypercare:** Documentation handed over including user guides, product specifications and training material. A period of hypercare scheduled into the plan gives enhanced support for a period of 4 weeks post deployment. In this period there will be some of the dedicated delivery team members available for any support whilst the deliver moves into BAU support.
- **Data Migration:** Sometimes clients require data migration run and supported from their old systems to their new ones. This can involve data analysis, review, cleanse, test and import. We implement several controls to make this process as seamless as possible.



Support

Our support function is operated by a team of Service Management experts. With a team comprised of technical and service delivery professionals, we have a wealth of knowledge and capability. The support function provides support on any queries, issues, changes or requests that you may have throughout the engagement. We also have a robust agreement in place with Zoho who will provide further escalated support if necessary.

Enhanced support is typically provided by us initially post go-live to ensure the transition phase to the Zoho solution runs smoothly. To raise support tickets, we have an interactive Service Desk portal with standard SLAs that can be enhanced if required.

Security

Security is a key component in Zoho offerings, and is reflected in their people, process, and products. With advanced security features like encryption, audit logs, IP restrictions, and two-factor authentication, Zoho conveniently protects data, only allowing access to the users you authorize. Granular user permissions can be implemented to restrict data access within the application further. More information about compliance and certifications can be found [here](#), and security information can be found [here](#).

Free trials

Zoho offers trial services for applications. Free trials can be accessed by clicking on the application name [here](#). Alternatively, if you are not sure which application would best meet your requirements then please contact us using the details below and we would be happy to discuss this with you.

Case Studies

Zoho is used by over 100 million people globally across a number of [clients](#) and sectors.

4 Contact Details

Please send your requirement to publicsectorbidteam@deloitte.co.uk. Alternatively, if you wish to discuss your requirements in more detail, please send us the following information and we will be happy to contact you:

- Your organisation name
- The name of this service
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work.



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