

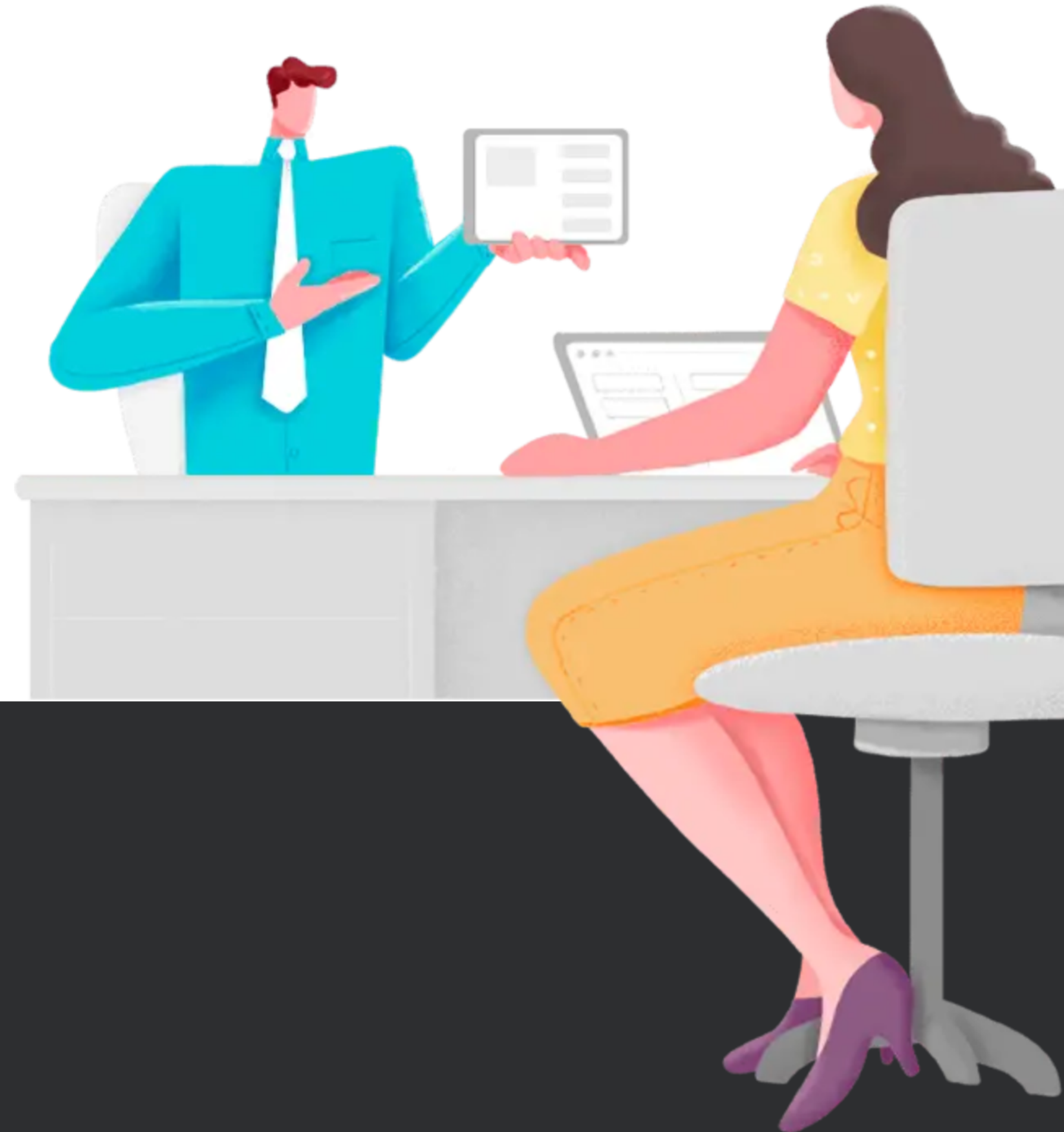
# Zoho CRM

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VS

# HubSpot

COMPARISON DOCUMENT



# What is Zoho CRM?

Zoho CRM is an award winning CRM which is trusted by a global network of over 250,000 businesses in 180 countries to help them convert more leads, engage with customers, and grow their revenue.

## Zoho CRM is not just different, it's better.

Zoho CRM's bottom-up approach—starting with serving the mid-market and steadily growing to now serve enterprise markets as well—has enabled us to carry forward our intuitive UI and user friendly experiences while still delivering all the in-depth functions needed by larger enterprises. Both CRM power users and people new to CRM software can be onboarded quickly to start using the platform effectively.

## USP for Zoho CRM:

- User friendly and easy to use
- Easy to get up and running with no prior training
- Low learning curve for people who are not used to a CRM
- Extensive process automation functionalities
- Extensive customization options are available, but not mandatory

## Why do customers like Zoho CRM?

Zoho CRM—with its broad coverage, advanced features, and intuitive UI—can go head-to-head against any other big brand name when it comes to technology and functionality. For the last 15 years, Zoho CRM has invested extensively in product R&D, resulting in a mature, enterprise-grade software solution. While other companies have invested revenue in continuously promoting their products, we've invested the majority of our profits in the core principles of software development, expanding our CRM feature set and leveraging functionality from the larger Zoho ecosystem. This truly robust offering empowers our customers to flexibly scale and adapt as they react to an evolving global market.

## HubSpot Sales Hub

HubSpot Sales Hub is a good CRM solution for small businesses when they are just starting out. This is because it includes a range of basic functions required by SMBs, who may not be in a position to purchase a different tool for every process in their organization. For example, HubSpot comes with live chat, email marketing, and telephony features. But businesses grow fast, and soon they start requiring enterprise grade functionality, which is where HubSpot fails to deliver. HubSpot suffers from limited customization options and a lack of process automation capabilities, in-depth analytics, productivity enhancing artificial intelligence features, and developer platform functions, which may not be important to small businesses with limited budgets who are looking for a quick solution, but are must-haves for larger companies. Businesses that are thinking bigger, or more long term, with respect to future growth might want to go for a fully-equipped scalable solution like Zoho right out of the gate.

# The comparison, in a nutshell

We've compared the Standard, Professional, Enterprise, and Ultimate editions of Zoho CRM with the Starter, Professional, and Enterprise editions of HubSpot Sales Hub along the following parameters: [Lead Management](#), [Omnichannel Communication](#), [Process and Journey Orchestration](#), [Automation](#), [Sales Enablement](#), [Analytics](#), [Performance Management](#), [Sales Intelligence](#), [Customization](#), [Marketing Automation](#), [Team Collaboration](#), [User Experience and Interface](#), [Mobility](#), [Security](#), and [Developer Platform](#).

Here's a summary of the capabilities of the two products.

Zoho CRM			HubSpot Sales Hub		
Pricing Plan			Pricing Plan		
	Billed Annually	Billed Monthly		Billed Annually	Billed Monthly
Free	\$0	\$0	Free	\$0	\$0
Standard	\$14	\$20	Starter	\$45	\$50 (Min 2 users)
Professional	\$23	\$35	Professional	\$450	\$500 (Min 5 users)
Enterprise	\$40	\$50	Enterprise	\$1200	\$1200 (Min 10 users)
Ultimate	\$52	\$65			
<b>Agent Limit</b> Pay for each license			<b>Agent Limit</b> Pay for each license		
<b>Trial Period</b> 15 days			<b>Trial Period</b> 15 days		

**Distinguishing capabilities**  
Process Management (Blueprint)  
Journey Management (Command Center)  
UI Design Studio (Canvas)  
Prediction Builder (Zia)

**Customers**  
Blue Star, Suzuki, BOSE Audio

**Support**  
Phone  
Chat  
Email

**Platforms Supported**  
iOS  
Android  
Web

**Distinguishing capabilities**  
Live chat  
Forecasts  
Integration Options

**Customers**  
Chargebee, Happymarketer, Storehub

**Support**  
Phone  
Chat  
Email

**Platforms Supported**  
iOS  
Android  
Web

\*All information in the document is based on publicly available data.

# Lead and Deal Management

Sales force automation software for enhanced sales productivity



From initial contact to the final sale, your prospect goes through a number of interactions with various different teams in your business. A CRM solution that compartmentalizes these sequences, provides contextual information for every interaction, and seamlessly connects them results in shorter sales cycles, as well as helping your business build longer lasting relationships with your customers.

## Zoho CRM:

Zoho CRM offers a comprehensive set of tools to help businesses contact, capture, nurture, and convert the maximum number of leads. For sales reps on the move, the Zoho CRM mobile app comes with business card scanning, voice-to-text notes and many other handy features to help capture and track lead information in the field.

## USP for Zoho CRM:

- Kanban view: See all your leads and deals organized according to their stages in the pipeline. Drag and drop a deal to change its stage with ease.
- Webform analytics and A/B testing: Analyze your webforms' performance and improve your lead generation capabilities through A/B testing.
- Zia lead assignment suggestion: Assign records to the most qualified rep based on their history of handling similar tasks.

## HubSpot Sales Hub:

HubSpot's lead management functionality gives you the basic tools to capture, qualify, and nurture leads. The detail view lets you see all the calls, emails, notes, tasks, meetings, and activity updates related to a contact. The HubSpot mobile app for iOS and Android includes features such as business card scanning and caller ID. Lead scoring is only available in the Professional Edition and above, while Zoho CRM offers it right from the Standard Edition. You can also import leads from CSV files and map them to the fields in the system. However, some key features such as Kanban views for deals and artificial intelligence for lead assignment are missing from all HubSpot editions.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Leads and Contacts	✔	✔	✔	✔	✔	✔	✔
Accounts and Deals	✔	✔	✔	✔	✔	✔	✔
Deal Stages	✔	✔	✔	✔	✔	✔	✔
Tasks, events, call log, and notes	✔	✔	✔	✔	✔	✔	✔
Multiple Pipeline Management	✔	✔	✔	✔	✔	✔	✔
Multiple currencies	--	✔	--	✔	✔	✔	✔
CRM Views	✔	✔	✔	✔	✔	✔	✔
Advanced filters	✔	✔	✔	✔	✔	✔	✔
Reminders	✔	✔	✔	✔	✔	✔	✔
Contextual Custom Related Lists	--	--	✔	--	✔	✔	✔
SalesSignals	--	--	✔	--	✔	--	✔
Custom Signals	--	--	✔	--	✔	--	✔

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\*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Web-to-lead form	5 forms/module	☑	10 forms/module	☑	20 forms/module	☑	100 forms/module
Web-to-contact form	5 forms/module	--	10 forms/module	--	20 forms/module	--	100 forms/module
Web-to-case form	--	☑	10 forms/module	☑	20 forms/module	☑	100 forms/module
Cases	--	--	☑	--	☑	--	☑
Solutions	--	--	☑	--	☑	--	☑

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# Omnichannel

Multiple channels, one platform for communication



Reaching customers where they are is necessary to enable meaningful interaction these days. CRMs which offer omnichannel communication support are no longer a luxury but are now required for creating a positive customer experience and achieving a high conversion rate. We will be looking at email, telephony, live chat, and social media to compare how Hubspot Sales Hub and Zoho CRM handle omnichannel communication

## Zoho CRM:

Zoho CRM allows you to connect with your customers through multiple channels with access to centralized information that empowers your sales team to have contextual, meaningful conversations. Bundled live chat and social media integrations help you proactively connect with prospects on your website and social media platforms. Zoho CRM has pre-built integrations with 100+ PBX providers around the world as part of the Zoho PhoneBridge platform.

## USP for Zoho CRM:

- SalesInbox: Organize your messages according to your CRM pipeline, so you can stay on top of your most important deals. Drag and drop emails across the columns to add contacts or create deals.
- Auto-generate leads from social media: Set up triggers to add leads and contacts from social media automatically based on their interactions with your brand.
- Segment website visitors: Automatically segment website visitors into leads, prospects, and customers and prioritize your engagements accordingly.

## HubSpot Sales Hub:

Hubspot Sales Hub integrates with Outlook and Gmail, giving sales reps the power to reply to their emails directly from their CRM. With the Conversations Inbox, you can connect team email addresses to a shared inbox and automatically turn incoming emails into tickets. Live Chat is included with all editions and lets you chat one-to-one with visitors as they browse your site, so you can give them the information they need about your business.

- If you are looking for Facebook, LinkedIn, or Twitter integrations to schedule and publish updates, monitor terms, and analyze performance, you will need to purchase the Professional edition of Marketing Hub separately.
- Email parser functionality to capture data from customer emails is not available in any edition.
- Hubspot does not offer lead enrichment functionality

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
SalesInbox	☑	--	☑	--	☑	--	☑
BCC Dropbox for emails	--	--	☑	--	☑	--	☑
Email Insights	☑	☑	☑	☑	☑	☑	☑
Email Parser	--	--	--	--	☑	--	☑
Email association with deals	--	--	☑	--	☑	--	☑
Customer emails inside CRM	☑	☑	☑	☑	☑	☑	☑
Email templates	☑	☑	☑	☑	☑	☑	☑
Schedule mails	☑	☑	☑	☑	☑	☑	☑
Mass emails	☑	☑	☑	☑	☑	☑	☑
Telephony and PBX	☑	☑	☑	☑	☑	☑	☑
Automatic call logging	☑	☑	☑	☑	☑	☑	☑



Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Enrich data from Twitter	✓	\$	✓	\$	✓	\$	✓
Enrich data from Facebook	✓	\$	✓	\$	✓	\$	✓
Social module	✓	\$	✓	\$	✓	\$	✓
Automated social lead generation	✓	--	✓	--	✓	--	✓
Live chat	✓	✓	✓	✓	✓	✓	✓
Live chat reports	✓	✓	✓	✓	✓	✓	✓
Online meetings	✓	--	✓	--	✓	--	✓

\*All information in the document is based on publicly available data.

# Automation

Automate. Be Productive



The ability to automate everything from field updates and task creation, to fully automating different large scale processes across your sales operation is at the heart of every SFA tool. Automation helps decrease the amount of grunt work and data entry handled by sales reps, so they can focus more on prospecting, engaging buyers, and closing deals.

## Zoho CRM:

You can automate regular sales routines with Workflows in Zoho CRM. The drag-and-drop builder and the intuitive UI makes it easier to visualize, construct, and edit workflows according to your needs.

Workflows in Zoho CRM are synchronous with the execution of custom functions, which are asynchronous, and tasks requiring on-demand automation, which are handled by macros. At the click of a button, macros execute multiple actions on one or multiple records such as updating a field, sending an email, or creating a new task.

## USP for Zoho CRM:

- Zia workflow suggestions: Zia combs through your audit logs and activity history to identify patterns in your data and suggest pre-built workflows to make your sales process easier.
- Macros: With a single click, macros can send an email simultaneously, update a record, or create a task. You can combine multiple actions in a single macro and apply them to a whole batch of records at the same time.

## HubSpot Sales Hub:

You can use workflow rules to automatically send email alerts, assign tasks, and update fields when certain requirements are met. But Hubspot Sales Hub does not offer features that go beyond basic workflow functionality, such as validation rules, escalation rules, approval processes, or artificial Intelligence in automation.

Another important feature that isn't available in Hubspot Sales Hub is macros. Macros enable a user to send emails, create tasks, and update a field in all the records with a specified value at the click of a button. Macros are available in all editions in Zoho CRM.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Workflow rules	✔	✔	✔	✔	✔	✔	✔
Assignment rules	✔	✔	✔	✔	✔	✔	✔
Approval process	--	--	--	--	✔	--	✔
Schedules	--	--	--	✔	✔	✔	✔
Review process	--	--	--	--	✔	--	✔
Escalation rules	✔	--	✔	--	✔	--	✔
Validation rules	✔	--	✔	--	✔	--	✔
Macros	--	--	✔	--	✔	--	✔
Email parser	--	--	--	--	✔	--	✔
Lead scoring	✔	✔	✔	✔	✔	✔	✔
Webhooks	✔	✔	✔	✔	✔	✔	✔

\*All information in the document is based on publicly available data.

# Process and Journey Management

Build your sales team's roadmap to success



A successful business is always the result of the right combination of dedicated employees and well-thought-out processes. However, a great process is no use if it can't be replicated and automated in your business applications. Your CRM should help you build, automate, and get the most out of all your sales processes, whether they are simple or complex, from standardized processes to complete end-to-end customer journeys.

## Zoho CRM:

Blueprints in Zoho CRM help you build scalable and repeatable sales processes. You can visually design your sales process with an easy-to-use drag-and-drop builder. You can automate any action, such as creating tasks, sending emails, adding or updating records, updating tags, and using webhooks and custom actions.

## HubSpot Sales Hub

HubSpot Sales Hub does not offer the functions required to build entire end-to-end sales processes. This leaves a large gap in its functionality and makes it more suitable for small businesses than for enterprises looking for a scalable solution to implement sales processes.

## USP for Zoho CRM:

- CommandCenter: Coordinate brand messaging across multiple channels to maintain a continuous, personal conversation with your customers
- Third-party app functions: Easily connect with third-party applications as needed during the journey. Third-party app activity can trigger specific actions, or vice versa.
- Analyze customer journeys: Track how long each of your customer journey's individual stages take to help identify bottlenecks and loopholes. Create multiple versions of each journey and compare their performance to identify the best one.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Process builder(Blueprints)	--	--	☑	--	☑	--	☑
Active processes	--	--	3	--	50	--	100
Journey Builder(Command Center)	--	--	--	--	☑	--	☑
Sales process analytics	--	--	--	--	☑	--	☑

### Suggested links

- Interested to know how you can build detailed sales processes for your organization with Zoho CRM's Blueprint? Please click [here](#).
- Interested to know how you can build personalized customer journeys with Zoho CRM's Command Center? Please click [here](#).

# Remote Readiness

Communicate, collaborate, and sell from anywhere



Today's sales teams need to communicate, collaborate, and do their best work from anywhere – not just from the office. From building teams to running meetings and events, businesses of all types and sizes are increasingly moving large portions of their business processes online. Your CRM should enable you to work with a remote workforce, put together flexible work policies and set up digital spaces to collaborate.

## Zoho CRM:

Zoho CRM allows you to conduct sales presentations, training webinars, and meetings, right from your CRM. Telephony and PBX integrations allow salespeople to have conversations with your prospects away from office. With the free Zoho Cliq integration, you can also create channels in Cliq to brainstorm, discuss sales strategies, and share information from Zoho CRM.

## USP for Zoho CRM:

- Conduct meetings and presentations - Zoho CRM integrates with a wide range of popular web meeting and conferencing applications like GoToMeeting, TeamViewer, Zoom, Cisco WebEx and Zoho Meeting
- Mobile apps - Zoho CRM's mobile app makes it easy to access data from anywhere, at any time. Add and modify customer information in real time, even when you're offline.
- Video Collaboration with Cliq - Make decisions faster together with audio and video calls. Get on a video call directly from the chat window and share your screen.

## HubSpot Sales Cloud:

HubSpot Sales Hub remote sales functionality requires you to buy additional products for Meeting, Video conferencing and real time chat. You can find integrations for Zoom, Google Meet, Slack, GoToWebinar along with many other apps in the Hubspot Marketplace.

# Customization

Make your CRM truly yours



The benefits a CRM brings to an organization greatly depends on how much it can be tailored to fit the needs and use cases of the organization. The CRM should be able to acclimatize to the way your organization works, not the other way around. A truly customizable solution can be modified as needed to fit your business.

## Zoho CRM:

The bottom-up approach toward customization in Zoho CRM and wide array of out-of-the-box customization options makes it easy to retrofit according to your sales team's needs. You can customize page layouts and which modules that are displayed to each user, create custom modules, and configure dynamic layouts that change based on field entry, all without technical expertise or hiring implementation specialists.

## USP for Zoho CRM:

- **Canvas:** This feature allows you to customize CRM record design. This drag-and-drop builder lets you sculpt your records to match your business' requirements. This feature provides a host of elements such as images, custom action buttons and fields that let you completely refurbish how your CRM records look.
- **Custom Buttons:** This is another unique feature that Zoho CRM offers that enables your sales reps to perform bespoke actions with just a click of a button.
- **Multiple Pipelines:** Each product/ service has its own unique sales cycle. The Multiple Pipelines feature lets you customise sales stages accordingly.
- **Sandbox:** Test out your new customisations without risking losing or corrupting the existing systems you have in place, using the Sandbox feature . If you are happy with the changes you can push it live directly from the Sandbox environment.

## HubSpot Sales Hub:

Sales Hub offers limited customization options compared to Zoho CRM. For example, you can't create custom buttons to help sales reps perform bespoke actions with a single click. Even basic features such as tab grouping and picklist history tracking are missing from Sales Hub. Sales Hub also drops the ball when it comes to creating custom modules. This feature is only available in the Enterprise edition and there is limit of 10 custom modules and a restriction on the number of records that can be associated with these modules.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Page Customization	✔	✔	✔	✔	✔	✔	✔
Rename Tabs	✔	✔	✔	✔	✔	✔	✔
Tab groups	--	--	--	--	✔	--	✔
Page Layouts	--	--	--	✔	✔	✔	✔
Layout rules	--	--	--	--	✔	✔	✔
Validation rules	--	✔	--	--	✔	--	✔
Web tabs	--	--	--	--	✔	--	✔
sub forms	--	--	--	--	✔	--	✔
Translations	--	--	--	--	✔	--	✔
Custom Fields	✔	✔	✔	✔	✔	✔	✔
Custom modules	--	--	--	--	✔	✔	✔

\*All information in the document is based on publicly available data.



Features	<b>Zoho CRM Standard</b>	Sales Hub Starter	<b>Zoho CRM Professional</b>	Sales Hub Professional	<b>Zoho CRM Enterprise</b>	Sales Hub Enterprise	<b>Zoho CRM Ultimate</b>
Custom buttons	--	--	--	--	☑	--	☑
Custom list views	☑	--	☑	--	☑	--	☑
No-code Design platform	Canvas	--	Canvas	--	Canvas	--	Canvas
Picklist history tracking	--	--	--	--	☑	--	☑
Business hours	☑	☑	☑	☑	☑	☑	☑
Sandbox	--	--	--	--	☑	☑	☑
User portals	--	--	--	--	☑	--	☑

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# Analytics and Reporting

Make data-driven decisions



A CRM is a big repository of information and without a comprehensive range of analytics, this information will not only become overwhelming, but you will also fail to identify important patterns in your business that require your attention. Ensure that your CRM enables you to monitor all key data points to make data-driven business decisions and stay ahead of your competition using actionable insights.

## Zoho CRM:

Zoho CRM comes with a host of prebuilt dashboards and reports and the ability to schedule reports. KPI, Funnels, Target Meter, and Comparator are other analytics options that provide in-depth analysis of leads and sales reps' performance. These features are also available in Sales Cloud, but creating these reports and dashboards is much easier and less time-consuming in Zoho CRM, which uses a drag-and-drop system for creating real-time view analytics.

## USP for Zoho CRM:

- Quadrant: This unique component for analytics can help you analyze multiple data points together and pinpoint focus on certain areas.
- Cohort: If you want to analyze similar data groups together, Cohort has you covered in Zoho CRM.
- Integration with Zoho Analytics: This enables more complex analytics by correlating data sets from multiple applications, spread over longer periods of time. This allows for in-depth analyzes that can be used for executive decisions.

## HubSpot Sales Hub:

Sales Hub offers standard analytics reports and dashboards that enable you to monitor your sales process. However, the lack of customization options is a major drawback. Custom reports and dashboards are only available in the Professional and Enterprise editions, and the custom report builder is less intuitive than the only offered in Zoho CRM.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Standard reports	✔	✔	✔	✔	✔	✔	✔
Custom reports	✔	--	✔	✔	✔	✔	✔
Schedule reports	✔	--	✔	✔	✔	✔	✔
Charts	✔	✔	✔	✔	✔	✔	✔
KPI	✔	✔	✔	✔	✔	✔	✔
Funnels	✔	--	✔	✔	✔	✔	✔
Target meter	✔	✔	✔	✔	✔	✔	✔
Comparator	--	--	✔	--	✔	--	✔
Cohorts	--	--	--	10	✔	25	✔
Quadrants	--	--	--	--	✔	--	✔
Anomaly detectors (Powered by Zia)	--	--	--	--	✔	--	✔

\*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Sales Hub Standard	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Standard dashboards	✔	✔	✔	✔	✔	✔	✔
Custom dashboards	✔	10	✔	25	✔	50	✔
Webform analytics	--	--	--	--	✔	--	✔
Webform A/B testing	--	--	--	--	✔	--	✔
Analytics mobile app (Analytics Studio )	✔	--	✔	--	✔	--	✔
Workflow reports	--	✔	--	✔	✔	✔	✔

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# Sales Intelligence - Zia

Leverage AI to help with the heavylifting



Once considered a luxury, Artificial Intelligence has now become a necessity for businesses to stay sharp, read between the lines, and ensure no sale slips through the cracks. When choosing a CRM, ensure your sales managers and reps are able to leverage the power of an intuitive, context-aware artificial intelligence assistant for everything from evaluating leads and assigning them to the most suitable rep, to helping your reps by taking notes for them.

## Zoho CRM:

Zia helps you identify the best leads, predict sales, detect anomalies and automate mundane tasks. Zia even takes notes when you dictate so your sales reps don't have to go looking for a pen to note down something important about a lead or a key observation. Image validation and data enrichment are also other key features Zia performs.

## USP for Zoho CRM:

- Conversational assistant: You can either text or talk to Zia to pull dates, reports, charts, and even ask it to make changes in records. You can dictate notes or reminders.
- Anomaly detection: Zia detects and flags anomalies in your sales cycle so you're always on top of trends and able to act accordingly.
- Zia Prediction Builder: This toolkit enables administrators to build predictions such as the chance of winning a deal, growth, and expenditure and can forecast outcomes for both standard and custom modules.

## HubSpot Sales Hub:

HubSpot has almost no built-in artificial intelligence capabilities. Lead conversion, deal closure prediction, and image validation are the only AI features Sales Hub offers in the Enterprise edition. This lack of robust AI functions means that even the most tedious parts of your sales process cannot be automated, and the rich context a CRM can provide to sales reps is severely limited.

Features	Zoho CRM Standard	Sales Hub Standard	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Lead Conversion Prediction	--	--	--	--	☑	☑	☑
Deal closure prediction	--	--	--	--	☑	☑	☑
Data enrichment	--	--	--	--	☑	☑	☑
Zia voice	--	--	--	--	☑	--	☑
Zia reminder	--	--	--	--	☑	--	☑
Best time to contact	--	--	--	☑	☑	☑	☑
Macro suggestion	--	--	--	--	☑	--	☑
Zia Intelligence for automation	--	--	--	--	☑	--	☑
Prediction builder	--	--	--	--	☑	--	☑
Assignment suggestions by Zia	--	--	--	--	☑	--	☑
Workflow suggestions by Zia	--	--	--	--	☑	--	☑

\*All information in the document is based on publicly available data.

Features	<b>Zoho CRM Standard</b>	Sales Hub Standard	<b>Zoho CRM Professional</b>	Sales Hub Professional	<b>Zoho CRM Enterprise</b>	Sales Hub Enterprise	<b>Zoho CRM Ultimate</b>
AI for emails	--	--	--	--	☑	--	☑
Reccomendation engine	--	--	--	--	☑	--	☑
Image validation	--	--	--	--	☑	☑	☑
Sales forecasting	☑	--	☑	--	☑	☑	☑
Website visitor tracking	☑	--	☑	--	☑	--	☑

\*All information in the document is based on publicly available data.

# Sales Enablement

Make selling easier for reps



The best way to motivate your sales reps is to provide them with the right sales tools that help them close faster. CRMs can often be business-centered and forget about the people who use them day-in and day-out. Ensure your sales reps have a comprehensive arsenal of tools that enable them to deal with lead requirements and the paperwork that comes with closing deals without having to toggle between applications.

## Zoho CRM:

Since Zoho CRM was built for businesses of all sizes, it comes with a comprehensive set of prebuilt sales enablement tools that enable sales reps to be a single point of contact for the customer from the beginning to end of a sale.

Zoho CRM's integration with the Zoho Finance Suite allows your sales representatives to instantly generate quotes, sales, or purchase orders from Zoho CRM. Grant your team access to expense, inventory, and subscription information from Zoho CRM to help them avoid the hassle of shuffling between different software applications.

## USP for Zoho CRM:

- **Wizards:** This feature lets you divide a long form into a series of screens that collect information. This ensures your sales reps don't miss any key fields.
- **User Portals:** Give your customers partial access of your CRM with the User Portals function. Giving customers direct access to certain modules and some of the data associated with their records such as invoices and loyalty points frees up your sales reps from responding to common requests for basic information.
- **Calendar synchronization:** Sales reps and administrators can sync reminders and meetings to their calendars so they never leave customers hanging.

## HubSpot Sales Hub:

Sales Hub offers a similar array of sales enablement features. Managing quotes and sales orders is available as standard. However, Sales Hub doesn't have an option to create price books by product. The lack of advanced features like Zoho CRM's SalesInbox, which automatically prioritizes and organizes your emails according to the deals that matter most to you, is also a major drawback.



Features	<b>Zoho CRM Standard</b>	Sales Hub Standard	<b>Zoho CRM Professional</b>	Sales Hub Professional	<b>Zoho CRM Enterprise</b>	Sales Hub Enterprise	<b>Zoho CRM Ultimate</b>
Price books	--	--	☑	--	☑	--	☑
Sales quotes	--	--	☑	☑	☑	☑	☑
Sales orders	--	☑	☑	☑	☑	☑	☑
Folder sharing	☑	☑	☑	☑	☑	☑	☑
Attach documents	☑	☑	☑	☑	☑	☑	☑
File versioning	☑	--	☑	--	☑	--	☑
Reviews	☑	--	☑	--	☑	☑	☑
Wizards	--	--	--	--	☑	--	☑
Sales Inbox	--	--	--	--	☑	--	☑

\*All information in the document is based on publicly available data.

# Marketing Automation

Bridge the sales-marketing divide



While a CRM is primarily designed to structure, streamline, and improve the sales functions of your business, it should also help you to perform another key function that drives sales: marketing. Running your marketing processes from the same ecosystem as your sales ensures the two functions stay connected. This will help you better target leads, engage prospects, and upsell to existing customers.

## Zoho CRM:

Zoho CRM allows you to run email marketing campaigns, map leads with the marketing campaigns that they were captured from, and even segment your customers so you can target them better. These marketing features are usually only available behind paywalls, but Zoho CRM allows you to perform simple marketing functions and build a better connection with your customer base at no extra cost.

## USP for Zoho CRM:

- Zoho CRM has an RFM (Recency, Frequency, Monetary) customer segmentation feature that helps you group and target your customer demographics.
- Google Adwords is available as a free integration. Adwords is one of the most commonly used lead generators and you can keep tabs on all your Adwords campaigns right from your CRM and identify the best performing ones and optimize accordingly.
- Surveys: You can engage with and receive feedback from your customers by sending surveys right from your CRM using the Zoho Survey integration.

## HubSpot Sales Hub:

HubSpot offers only very basic marketing features such as mass email and email relay options in Sales Hub and you will have to purchase and integrate Marketing Hub to access more advanced features like Marketing Attribution, and Marketing Campaigns. There is also no customer segmentation function, which makes it difficult to understand your customer demographics and accurately target specific customer groups.

Features	Zoho CRM Standard	Sales Hub Starter	Zoho CRM Professional	Sales Hub Professional	Zoho CRM Enterprise	Sales Hub Enterprise	Zoho CRM Ultimate
Email templates	✔	✔	✔	✔	✔	✔	✔
Email opt-out	✔	✔	✔	✔	✔	✔	✔
Mass email	✔	✔	✔	✔	✔	✔	✔
Email relay	--	--	✔	✔	✔	✔	✔
Email Authentication	✔	--	✔	✔	✔	✔	✔
Marketing campaigns	✔	--	✔	--	✔	--	✔
Marketing attribution	--	--	--	--	✔	--	✔
Customer segmentation	--	--	--	--	✔	--	✔
Auto response	--	--	✔	✔	✔	✔	✔
AdWords Integration	--	--	✔	--	✔	--	✔

\*All information in the document is based on publicly available data.

# Team Collaboration

Bridge knowledge gaps, and bring your teams together.



Converting a lead into a recurring customer involves various stages and multiple teams working together. It's therefore imperative that your CRM system has all the necessary tools to enable better communication, provide visibility into the statuses of active tasks and projects, and improve overall productivity.

## Zoho CRM:

Zoho CRM is a collaborative CRM built to facilitate communication with your customers as well as your own teams. It enables teams to add helpful context to their sales records, helps them stay connected with real-time sales updates, and connects your collaboration tools so your team can share all their updates from one platform.

## USPs for Zoho CRM:

- Built-in Calendar: Schedule calls with customers and prospects, and easily check your colleagues' schedules using Zoho CRM's built-in calendar.
- CalDav Sync: Integrate with Google, Apple, Outlook, Office 365, or Zoho Calendar to stay on top of all your appointments and events with two-way sync. Sync your calendar with any iOS device using the CalDav Sync feature.
- Feeds: A centralized hub to discuss strategy, share ideas and best practices, or celebrate big wins.

## Hubspot Sales Hub:

Compared to Zoho CRM, HubSpot has a very limited feature set for team collaboration. Even basic capabilities like calendar booking and sync have severe limitations.

HubSpot doesn't have a built-in calendar. You can use the Meetings tool to integrate with your Google or Office 365 calendar, but it's not possible to sync appointments or tasks with the calendar on any other device you use.

HubSpot doesn't offer a dedicated feed for teams to brainstorm ideas, or post updates, but they can conduct private contextual conversations within their shared team inbox.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Gamescope	✔	--	✔	--	✔	--	✔
Built-in Calendar	✔	--	✔	--	✔	--	✔
Calendar sync through CalDav	✔	--	✔	--	✔	--	✔
Calendar booking	✔	✔	✔	✔	✔	✔	✔
Status updates	✔	✔	✔	✔	✔	✔	✔
Direct messages	✔	✔	✔	✔	✔	✔	✔
Team Feeds	✔	--	✔	--	✔	--	✔
Attach files to feeds	✔	--	✔	--	✔	--	✔
Follow-up rules	✔	--	✔	--	✔	--	✔
Groups for team collaboration	✔	✔	✔	✔	✔	✔	✔
Tagging	✔	✔	✔	✔	✔	✔	✔

\*All information in the document is based on publicly available data.

# Security and Privacy

Earn your customer's trust by taking a security first approach.



The success of a business depends on the trust that its customers place in it. Customers are now, more than ever, paying attention to how businesses maintain the integrity of the vast amount of information they possess. So keeping data secure and private has become just as important as great customer experience in ensuring a long-lasting customer relationship.

## Zoho CRM:

Zoho CRM keeps your data secure and allows you to track changes with powerful features such as MFA, Encryption At Rest (EAR), in-built IP restriction to control unauthorized access, and audit logs. You can also sync with Active Directory to enforce company policies like password management, session management, and more. Zoho CRM is also compliant with government policies around the world like GDPR and CCPA.

## USPs for Zoho CRM:

- Roles and permissions: Administrators have greater control and flexibility to set permissions at the role, record, and field levels.
- Data sharing rules: With fine-grained sharing rules, records can be shared with individual users or groups as needed for collaboration.
- Data processing: From built-in consent gathering to handling sensitive data during processing like data encryption at rest and in transit, Zoho CRM has it all covered.

## Hubspot Sales Hub:

HubSpot provides all essential security features like single sign-on (SSO), two-factor authentication (TFA), and data encryption at rest and in transit to keep your data secure. It hosts its product infrastructure on AWS and GCP, which provide high levels of physical and network security. It's also compliant with various government data regulations like GDPR and the EU-US Privacy Shield. But most of the security features are only available in the Enterprise edition, including crucial ones like assigning roles and permissions to users.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Profiles	✔	--	✔	--	✔	✔	✔
Organizational hierarchy (Roles)	✔	--	✔	--	✔	✔	✔
Reporting hierarchy	--	--	--	--	✔	✔	✔
Field-level security	--	--	✔	--	✔	✔	✔
Data sharing rules	--	--	--	--	15 rules/module	✔	100 rules/module
Groups	✔	--	✔	✔	✔	✔	✔
Record-level sharing	--	--	--	--	✔	✔	✔
Data encryption (EAR)	--	✔	--	✔	✔	✔	✔
Territory management	--	--	--	--	✔	✔	✔
Audit logs	✔	✔	✔	✔	✔	✔	✔
Allowed IPs	✔	✔	✔	✔	✔	✔	✔
GDPR compliance	✔	✔	✔	✔	✔	✔	✔

\*All information in the document is based on publicly available data.

# Integrations and Add-ons

Connect your CRM seamlessly with the rest of your tech stack.



An ideal CRM solution should allow you to integrate your other business apps with it to run all your business processes smoothly and show you relevant customer context at every step. The advantage of choosing a software vendor like Zoho, which has 50+ products, is that we can cover all your business needs under a single roof. This minimizes compatibility issues and allows for easy data sync and better processing speeds.

## Zoho CRM:

Zoho CRM offers free integrations with most other Zoho products including Zoho Meeting, Zoho Desk for support, Cliq for collaboration, Zoho Campaigns for advanced marketing automation, Zoho Analytics for BI, and many more. It also has a huge marketplace of third-party apps which you can integrate with your CRM.

## USPs for Zoho CRM:

- Free integration with Zoho apps: You can integrate your Zoho CRM with the free version of other Zoho apps to run your business processes.
- More vendor options: HubSpot has integrations only with top vendors like Zoom, Slack and Ring.io, whereas Zoho CRM gives you the flexibility to choose any vendor of your choice for every functionality. For Online Meetings, you can integrate Zoho CRM with Zoom, GoToMeeting, Zoho Meeting, and 12 others. For Telephony, Zoho CRM has integrations with Ring.io, Amazon Connect, and 106 other vendors.
- Integration with Google apps: Zoho CRM allows you to integrate directly with Google Analytics, Google Ads, Google Drive, and more.

## Hubspot Sales Hub:

HubSpot's marketplace offers integrations with about 500 applications. You can integrate Sales Hub with the free editions of Service Hub, Marketing Hub and other HubSpot products. However, there are no options to integrate with some of the most widely used applications like GoToMeeting, Twilio, Dropbox, Google Analytics, Amazon Connect, and PayPal.



Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Online Meetings							
Zoom	✔	✔	✔	✔	✔	✔	✔
GoToMeeting	✔	--	✔	--	✔	--	✔
Zoho Meeting	✔	--	✔	--	✔	--	✔
Telephony and PBX							
Ring.io	✔	✔	✔	✔	✔	✔	✔
Amazon Connect, Twilio	✔	--	✔	--	✔	--	✔
Zoho PhoneBridge, Knowlarity	✔	--	✔	--	✔	--	✔
Team Collaboration							
Slack	✔	✔	✔	✔	✔	✔	✔
Teams	✔	✔	✔	✔	✔	✔	✔
Zoho Cliq	✔	--	✔	--	✔	--	✔

\*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Office Productivity							
Zapier	✔	✔	✔	✔	✔	✔	✔
Trello	✔	✔	✔	✔	✔	✔	✔
Zoho Flow	✔	--	✔	--	✔	--	✔
Storage							
Google Drive	✔	✔	✔	✔	✔	✔	✔
Dropbox	✔	--	✔	--	✔	--	✔
Zoho Workdrive	✔	--	✔	--	✔	--	✔
Analytics							
Google Analytics	✔	--	✔	--	✔	--	✔
DotConnect	✔	--	✔	--	✔	--	✔
Zoho Analytics	✔	✔	✔	✔	✔	✔	✔

\*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Email Marketing							
Mailchimp	✔	✔	✔	✔	✔	✔	✔
Active Campaign	✔	--	✔	--	✔	--	✔
Zoho Campaigns	✔	--	✔	--	✔	--	✔
Customer Service							
Zendesk Support	✔	✔	✔	✔	✔	✔	✔
Salesforce Service Cloud	✔	✔	✔	✔	✔	✔	✔
Zoho Desk	✔	--	✔	--	✔	--	✔
Finance							
PayPal, Razorpay, PayU	✔	--	✔	--	✔	--	✔
Stripe, Chargebee, Quickbooks	✔	✔	✔	✔	✔	✔	✔
Zoho Books, Zoho Finance Suite	✔	--	✔	--	✔	--	✔

\*All information in the document is based on publicly available data.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Business Operations							
Amazon Seller Central	✔	--	✔	--	✔	--	✔
Microsoft Exchange	✔	--	✔	--	✔	--	✔
Microsoft							
Plug-in for Microsoft Outlook	✔	✔	✔	✔	✔	✔	✔
Integration with Microsoft 365	✔	✔	✔	✔	✔	✔	✔
Integration with G-Suite							
Contextual gadget for Gmail	✔	--	✔	--	✔	--	✔
Export events to Google Calendar	✔	--	✔	--	✔	--	✔
Export to Google Tasks	✔	✔	✔	✔	✔	✔	✔
CRM Webforms for Google Sites	✔	--	✔	--	✔	--	✔
Synchorize Google Calendar	✔	✔	✔	✔	✔	✔	✔
Synchronize Google Contacts	✔	✔	✔	✔	✔	✔	✔

\*All information in the document is based on publicly available data.

# Developer Tools

Build scalable solutions for personalized user experience.



Every business has a unique customer persona and requires a unique solution to cater to its needs. It is therefore important for a CRM to be able to support the development and deployment of custom solutions to provide personalized user experiences. The platform and tools provided by your CRM vendor dictate the extent to which your developers can add to the capabilities of a vanilla CRM to address multi-faceted business use cases.

## Zoho CRM:

Zoho CRM offers a wide range of tools for developers to do everything from orchestrating complex workflows to integrating with the rest of your tech stack and building custom solutions for your apps. Businesses can extend Zoho CRM's user interface by seamlessly connecting widget applications that use Zoho CRM data and workflows in real time.

## USPs for Zoho CRM:

- Deluge functions: Develop complex workflows using a simple programming function which makes workflows easier to develop and maintain.
- Webhooks: Webhooks let you trigger actions in third-party applications every time an event occurs in CRM. From creating a contact to closing a deal, use webhooks to connect your CRM with hundreds of other apps.
- APIs and SDKs: Push and pull data seamlessly from your other applications and build custom solutions for web and mobile applications.

## Hubspot Sales Hub:

HubSpot provides a range of developer tools to enable users to build their own apps, integrations, and custom functionalities, but it's limited compared to Zoho CRM. For example, HubSpot doesn't provide full-fledged web and mobile SDKs, just a chat widget SDK and a calling extension SDK, which allow you to customize the behavior of the chat widget on your website and enable communication between your CRM and calling app, respectively.

Interface extensibility is also minimal in HubSpot. Custom cards allow you to display information and perform basic actions in external apps, but there are very few options for customization compared to Zoho CRM.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Mobile SDK	--	--	--	--	☑	Limited	☑
Web Apps SDK	--	--	--	--	☑	Limited	☑
Widgets	--	Limited	--	Limited	☑	Limited	☑
Connections	--	--	--	☑	☑	☑	☑
API	☑	☑	☑	☑	☑	☑	☑
Functions	--	--	--	☑	☑	☑	☑

## Data Administration

Maintain the integrity of your customer data.



A CRM with good data administrative capabilities helps you organize all your company's customer data. Ensure that the data administrative capabilities in your CRM enable your administrator to create, verify records, provide hassle-free migration, and ample data backup capacity with minimal additional cost.

Features	Zoho CRM Standard	Hubspot Starter	Zoho CRM Professional	Hubspot Professional	Zoho CRM Enterprise	Hubspot Enterprise	Zoho CRM Ultimate
Free storage/org	1 GB	☑	1 GB	☑	1 GB	☑	5 GB
Free storage/user license	512 MB	☑	512 MB	☑	1 GB	☑	1 GB
Additional storage/license	--	☑	20 MB	☑	50 MB	☑	100 MB
Additional data storage	--	☑	\$	☑	\$	☑	\$
Import history	☑	☑	☑	☑	☑	☑	☑
Import data per batch	10,000 records	☑	20,000 records	☑	30,000 records	☑	50,000 records
Export module data	☑	☑	☑	☑	☑	☑	☑
Free data backup	2 backups/month	--	2 backups/month	--	2 backups/month	--	4 backups/month
Additional data backup	\$	--	\$	--	\$	--	\$
De-duplicate data	--	☑	☑	☑	☑	☑	☑

\*All information in the document is based on publicly available data.

## Here's what our customers say after they have switched to Zoho CRM



*"I did some serious digging into Zoho and each new layer I pulled back I became more and more excited. Not only did I find a CRM solution but a platform that would allow me to lower my monthly tech spend by \$6k - \$11k while centralizing all my data for better business intelligence. Salesforce has become what they set out to originally destroy. They are the new Oracle, Dynamics, SAP, etc.... Just look at the cost you are incurring to turn that monster on and get it to 60% of what you really need. Your timeline to recoup your investment will take years, if ever. "*

**Michael McMillan**

**Chief Stategist, ONE, Inc**



*"Zoho CRM was implemented at Blue Star in a few divisions that saw the need to improve the sales teams' productivity on the field (and virtually). It has been a great success since launch last year. This is largely due to the tool's design which is simple, elegant and user-friendly. The sales teams now enjoy a better grip on their day-to-day activities which are planned centrally instead of being spread across various disparate tools/apps. Teams have also pivoted to a more formal method of reviews via Zoho. All in all, it has been a worthwhile investment."*

**Suresh Iyer**

**Chief Information Officer, Blue Star**



*"Zoho is a big part of our organization. Before implementing Zoho CRM, our management team was lost in tracking current deals. With the number of calls and deals we handle on a daily basis, even our sales team had a hard time doing proper follow-ups. Now, with the 360 degree view of all modules that Zoho CRM offers, we are able to concentrate on prospecting the right leads and closing the most profitable deals."*

**Josef Carlo**

**Founder  
Mostaco Marketing**



# Zoho CRM Awards and Titles Showcase

Zoho CRM has been lauded by online critics, review aggregators, and most importantly, our users since our inception. Thanks to the love and trust of our 250,000+ customers worldwide, we went onto be recognized as the world's favorite CRM. Below, we have listed some of the most noteworthy titles we've won recently.



## **Nucleus Research - Leader, CRM Technology Value Matrix**

Nucleus conducts year round research to identify the CRM vendors who provide the highest value. Their research includes in-depth interviews with end users, vendor surveys, and ROI assessments in real-time environments. They have identified Zoho as a leader in its 2021 CRM Technology Value Matrix, providing both high functionality and usability to its customers.



## **Gartner Magic Quadrant - Challenger in Sales Force Automation**

In 2021, Zoho CRM was named as a Challenger in the Gartner MQ for Sales Force Automation. Zoho CRM has been climbing ranks on the quadrant consistently, thanks to the robust solution, exceptional customer experience, and increased market presence, all the while staying affordable.



## **Paul Greenberg's CRM Watchlist, 2022 - Winner with distinction (Highest score)**

In the 19th annual CRM Watchlist award—the brainchild of veteran CRM industry analyst Paul Greenberg—Zoho CRM emerged victorious with the highest overall score among strong competitors like Salesforce, Oracle, SAP, and more. This award stands as a testament to our relentless investment in R&D and our dedication to building a unified platform that champions great customer experiences.