InterConnecta Zoho CRM

AI SALES FOR ZOHO

Design an AI-powered sales process connected to Zoho CRM

From a prospect database to an active sales process

How to connect **enrichment**, calls with **DialRun AI**, follow-up, and **Zoho CRM** in a measurable sales operation.

GUIDE FOR B2B SALES TEAMS

Architecture · Configuration · Metrics · Implementation



B2B Scenario

What happens to a prospect inside the suite

Example of a configurable flow. Actions change based on the result of each interaction.

01

Zoho CRM identifies the prospect

A view, list, or workflow defines **which record enters** the process.

02

The agent enriches the context

Completes useful company and contact information **before calling**.

03

DialRun AI places the call

Uses the script, language, rules, and **approved criteria**.

04

The result decides the follow-up

Email, WhatsApp, human task, new call, or **sequence closure**.

05

Zoho CRM keeps traceability

Receives the data, summary, recording, and **defined next step**.

Orchestration

The call does not end the process: it decides what happens next

AI Sales for Zoho can activate different paths depending on the response received.

Confirmed interest

Create a follow-up, send information, and **coordinate a meeting**.

Requests information

Generate a **personalized email** or continue through WhatsApp.

Not available

Schedule a new attempt within the **allowed window**.

Sends documents

Extract relevant data and **update the corresponding record**.

Needs human attention

Assign a task or **transfer the context** to the sales rep.

No interest

Log the reason and **close or pause** the sequence.

THE FLOW IS NOT FIXED

Rules, channels, and handoffs are configured according to **your sales process.**

Zoho CRM

What the suite reads and what it writes back to the CRM

The integration is defined by **modules, fields, permissions, and workflows**. Not every implementation needs the same data.

Enrichment	Company, industry, contact, and context Complete defined fields
Call	Script, language, phone, and criteria Log result and activity
Conversation	Notes, summary, recording, and signals Update the record
Follow-up	Channel, message, date, and condition Create action or workflow
Documents	Extracted data and validations Update fields or attachments
Handoff	Priority, owner, and next step Assign task or meeting

CONTROL AND TRACEABILITY

Your team defines **what information each agent can access** and which data must return to Zoho CRM.

Solution design

What is configured in each implementation

Audience

Modules, views, segments, and **entry criteria**.

DialRun AI

Scripts, languages, voice, schedules, **retries, and handoffs**.

Follow-up

Email, WhatsApp, sequences, templates, and **conditions**.

Data

Consulted fields, generated data, and **update rules**.

Human control

Approvals, exceptions, assignments, and **escalation points**.

Measurement

Metrics, dashboards, goals, and **criteria to scale**.

Start with one agent and add new capabilities once **the value has been proven.**

Evaluation

How to measure sales and operational impact

Call volume is only one metric. Evaluation should connect **activity, continuity, and sales outcomes**.

Coverage

- **Enriched** prospects
- **Calls** completed
- **Effective** contacts

Speed

- **Time** to first contact
- **Time** to follow-up
- **Sequences** completed

Conversion

- **Relevant** conversations
- **Meetings** generated
- **Opportunities** created

Operation

- **Records** updated
- **Administrative tasks** reduced
- **Interactions** with a next step

Next step

Design the AI-powered sales process for your operation

An initial session helps identify **the bottleneck**, available data, the right flow, and the metric that will define success.

01 **Identify**
the process we need to improve

02 **Review**
how it currently works in Zoho CRM

03 **Define**
the agents, channels, and rules

04 **Agree**
on initial scope and success metrics

DESIGN YOUR SUITE

interconnecta.com

Zoho Premium Partner · +1,500 projects · +50 countries