



Zoho One in the Enterprise: Supporting Business Innovation and Growth in a Dynamic Enterprise

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Introduction

The ability of enterprise software to support business innovation and growth has long been the best yardstick by which its value is measured. However, the relative newness of the enterprise software market has meant that this sector's capabilities have historically lagged behind the needs of businesses, limiting enterprise software's uptake and overall value. In particular, using technology to support business growth and innovation has often been gated by the lack of a specific enterprise software capability necessary to meet a particular business requirement, regardless of the willingness of a company to implement new technology.

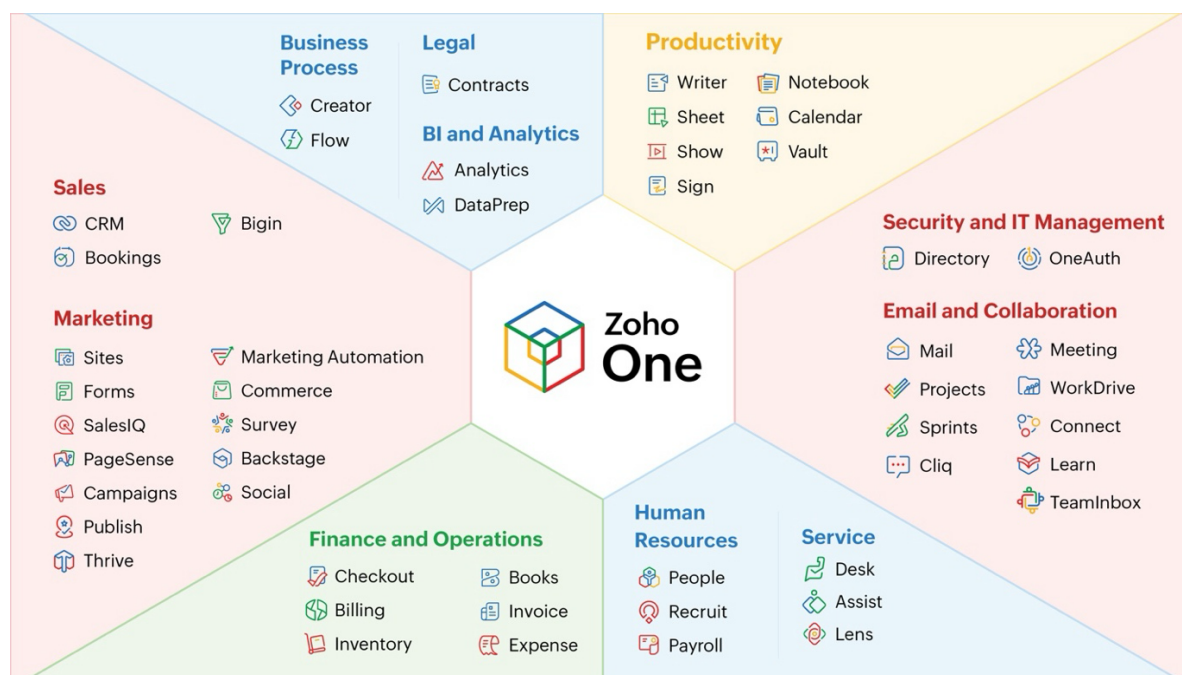
Even as new software capabilities roll out as part of regular upgrades and new releases, the complexity of matching specific business requirements to the new software often leads to technical debt in domains such as master data management and application integration, to name just two. This accumulation of technical debt has meant that implementation can be complex, costly, and time consuming, resulting in lower productivity for existing processes and innovations.

These built-in limits to productivity, which have dominated the world of enterprise software for over 30 years, have seen an important shift with the growing popularity of Zoho One, a suite of over 45 integrated software applications offered by Zoho Corp. The extraordinary breadth of functionality offered by Zoho One across sales, marketing, finance, HR, productivity, applications development, and other enterprise domains has meant that an enormous amount of business process functionality, supporting a wide range of industries, can be automated and tightly integrated across formerly siloed, unautomated business operations. The technical debt inherent in the inconsistent data models, lack of integration, and disconnected business processes of larger enterprise software market is typically not an issue when Zoho One is deployed correctly.

The fact that these capabilities are available as part of a simple pricing and licensing model, one that is orders of magnitude lower in cost than is the norm in the market, adds even greater value and more readily reduces risk than is usually the case in enterprise software deployments. Zoho One customers can, and do, typically start by deploying a handful of applications to meet their most pressing needs. When these customers are ready to deploy more functionality to a greater number of users, the simplicity of the pricing and licensing model means that growth in use and productivity can take place without incurring the additional costs historically associated with increased use. The result is unprecedented productivity in an enterprise software market that has historically been too high on costs and too low on real productivity gains.

This report is the first in a series by Enterprise Applications Consulting (EAC) on how Zoho One customers are able to leverage the breadth of the Zoho suite to grow and innovate as their business needs evolve. Whether a company is starting small and growing both organically and through merger and acquisition, as is the case with the company highlighted in this report, or whether a company starts its Zoho One journey as a medium to large enterprise and grows its business from there, the resulting gains in productivity relative to the cost and complexity of deployment can be truly extraordinary. In an enterprise software industry where measurable growth in productivity can be elusive, Zoho One's track record has the potential to break the mold and set new standards.

Figure 1: Zoho One Apps



Source: Zoho One

Liberty Security, a GardaWorld Company: Rapid Business Growth Mirrors the Rapid Growth in the Use of Zoho One

Liberty Security, based in Edmonton, Alberta, is an almost 20-year-old subsidiary of GardaWorld, which is focused on the delivery and maintenance of home and business security, parking, and other risk and cash management systems. The journey of Liberty, since its initial use of Zoho One, showcases the ability of the Zoho suite to support a dynamic business as it moves to capitalize on the changing business environment in which it operates. In Liberty's case, these changes included being acquired by a much larger company, GardaWorld, six years after Liberty first got started with Zoho, as well as being tapped by its new parent company to help position GardaWorld for continued growth. As we shall see, Liberty as an independent company, and then as part of GardaWorld, has continually supported its rapid business growth with the simultaneous increase in the use of Zoho One.

Liberty provides an excellent example of the synergy between business growth and the use of Zoho One. During the initial six years of using Zoho One prior to its acquisition, Liberty grew its use of the suite from three initial apps – *CRM*, *Books*, and *Billing* – to nineteen, and in the process grew the use of Zoho functionality from a total of 40 users to 180 users – virtually its entire staff. As of this writing, the total number of Zoho One apps in use by all 200 employees is 21 and growing, with additional users slated as part of an expansion of Zoho One to other parts of GardaWorld.

The processes supported by Zoho One increased in a similar fashion: From its initial uses in customer service, Zoho One went on to support finance, inventory management, e-signing, lead

management, employee onboarding, training, time tracking, and project management, among many other key processes. By 2021, Zoho One was even being used by Liberty to manage an annual charity golf event. (A list of some of the business processes impacted by Zoho One can be found in *Zoho One: Key Business Processes Impacted*.)

The Five Pillars of Enterprise Software in the Service of Business Innovation and Change

This mix of internal-facing processes, like employee training and time tracking, and external-facing processes like customer service and support, highlights how Zoho One can deliver top and bottom-line value across an enterprise's entire business by standardizing or simplifying five key aspects of the use of enterprise software to support business innovation and change.

This level of standardization across the majority of the Zoho One apps reduces or removes entirely the process and technical debt endemic to the majority of enterprise software customer deployments. These five pillars of enterprise software in the service of business change are as follows.

- 1) **Common user experience:** The similar user experience across Zoho One means that users familiar with one Zoho One app have a head-start when learning to use other apps in the suite. This allows Zoho One customers to eliminate the user experience silos that come from deploying best of breed applications.
- 2) **Built-in process integration:** Zoho One apps are intended to work seamlessly with one another, making it easy for users to effectively stay within a single, end-to-end business process as they move from one app to another. This eliminates the complexity and cost of managing multiple end-user sign-on credentials and the myriad different and often unsynchronized interfaces used between best of breed applications to support end-to-end processes.
- 3) **Common data model:** Core data objects, such as those supporting customer, inventory, employee, expenses, finance, invoices, and the like are common across Zoho One, allowing apps and business processes to share a "single version of the truth." The common data model

ZOHO ONE: KEY BUSINESS PROCESSES IMPACTED

CUSTOMERS

Subscription Management
Service & Support
Loyalty Management
Sales & Lead Management

OPERATIONS

Billing
Inventory & Warehouse Management
Project Tracking & Management
Pipeline Analysis
Document Management
E-signing
Event Management
Custom Development

EMPLOYEES

On-boarding
Time Tracking
Training
Scheduling
Performance Management
Health & Safety

also obviates the need for customers to invest in complex and expensive data integration and management strategies.

- 4) **Easy-to-deploy tools for customization:** Despite the high-degree of standardization that comes with common user experiences, process integration, and common data models, Zoho One's ability to support business-specific customization allows companies to balance the lower cost and ease of maintenance endemic to standardization with the need for customized business processes that can support unique competitive advantages. The Zoho One toolset supports a wide range of needs and capabilities by delivering end-user tools like *Forms*, low-code tools such as *Creator*, and full-stack professional tools like those found in *Catalyst*. (This ability to customize Zoho One does have downsides if not managed carefully. See the sidebar *Keeping an Eye on Customizations and Growth* below for more information.)
- 5) **Zoho One runs in Zoho's cloud data centers.** The fact that Zoho One is deployed exclusively across Zoho's global cloud simplifies both the deployment and support of Zoho One, particularly when compared to other enterprise software suites, which often run across multiple hyperscaler environments. While there is an element of choice that Zoho's competitors present regarding cloud deployment options, in reality, the use of third-party cloud providers has tended to add significantly to the complexity and cost of deploying enterprise software in the cloud, obviating the relatively scant benefits that might accrue from greater choice. As such, Zoho's exclusive use of its own cloud systems means that the company can exert tighter control over deployment as well as costs.

These five advantages, when added to the extraordinary breadth of the Zoho One offering and its low-cost pricing model, provide a unique opportunity for companies to take advantage of Zoho One in a highly incremental fashion while ensuring that productivity and value increase with growing use. Below is a description of how this unique value has played out in the use of Zoho One at Liberty Security since 2015. (See *The Growing Use of Zoho One Inside Liberty/GardaWorld*, below, for a concise timeline of the deployment of Zoho One apps.)

ZOHO ONE DRIVES CAREER GROWTH AND INNOVATION TOO

One of the ways in which Zoho One enables growth and innovation can be seen in the career trajectory of one of GardaWorld's top Zoho users, Brandon Lennix, GardaWorld's Director of Commercial Operations. While today Lennix helps manage GardaWorld's burgeoning commercial line of business, his journey with GardaWorld, and Zoho One, started as a customer service rep supporting residential services customers while working in what was then a pre-acquisition Liberty Security call center.

At the time Lennix had been looking for a new career after having grown out of running a small fast-food restaurant, and he took a call center job at Liberty in 2016, shortly after the initial roll-out of Zoho CRM. The usability of Zoho CRM and its flexibility "fascinated" Lennix almost immediately, as did Liberty's culture, and pretty soon he was going home at night, "popping open the laptop and learning more about Zoho," Lennix told EAC.

That curiosity led Lennix to make a habit of stopping by the office of his supervisor, Taylor Wolsey, to talk to him about what he thought he could do with Zoho One. "Eventually he would say 'stop bugging me,' and give me more access," said Lennix "That was my intro to being an admin. I needed to get in there and see how it was currently used, and then I could start thinking about how to make it more effective."

The usability of Zoho One helped speed up Lennix's learning curve. "Zoho does a good job of showing the everyday user about its capabilities," Lennix said. "That let me do the research and put the pressure on me and my boss to get the access." Lennix's curiosity led him to suggest building custom functions to automate different tasks and reduce the number of clicks it took to get individual tasks done.

A chance job opening in the call center came up, and six months after starting he was promoted to team leader. With the promotion came access to more functionality, and more opportunities to drive greater efficiency. In his new role he helped launch People in 2017 to manage call center time sheets, time-off requests, and other tasks, and eventually worked with Liberty's finance group to roll up the data from People to the company's accounting system.

Another promotion came his way several months later, making Lennix a customer service manager, and with a year he was promoted again, this time to director of call center operations, where his knowledge of Zoho One dovetailed neatly with the company's growing use of the suite. The initial launch of People had put Lennix in close touch with the finance group, and he became part of an effort to see if People could be brought into wider use across the company. "The project started with 'is it possible?'" Lennix said. "I dove in and played with the settings and found out that we could do it."

Working with the company controller, Lennix helped configure People, along with extending CRM to better support the company's loyalty and customer retention functions. That and many subsequent projects led to Lennix's latest promotion to the director of the company's new push beyond its residential customer base into the commercial security systems market. Once again, Zoho One and Lennix are pairing up to follow the company into a new market opportunity.

"Zoho was originally designed to support our residential side," Lennix said. "So I'm getting back in the trenches to see how to adapt Zoho to new requirements." In that capacity, one of Lennix's latest efforts is building out functionality in CRM to support new commercial sales opportunities and use Forms to create an automated work order form for the company's field technicians.

Considering the well-established synergy of Zoho One inside Liberty, and now GardaWorld, it's clear that Lennix has benefited as much as the company from the introduction of Zoho One in 2015. "Zoho has given me the opportunity to grow my career," Lennix told EAC. "I'm not sure I'd be in the position I'm in now without Zoho."

Zoho One in the Enterprise: The Liberty Security/ World Journey

2015: Getting Started with CRM, Books, Billing, and Customizations

Total number of apps in use: 3

Number of users: 40

When Liberty first started using Zoho in 2015, Zoho *CRM* was an important initial starting point – a common occurrence among Zoho One customers. Liberty also started its Zoho journey by deploying two other apps: *Books* and *Billing*. This initial use of *CRM* was limited to service support functions such as managing customer calls, loyalty management, ticketing, and accounting, while *Books* was used by customer service to update customer accounts, and *Billing* was used by the finance team to set up and manage new customer subscriptions. Using Zoho *CRM* for sales support would wait until 2019.

Liberty started its Zoho journey by tapping into the expertise of a Zoho partner, but the company quickly set out on its own. The simplicity of Zoho applications' user experience and the ability for users to modify and customize the applications made it relatively easy for Liberty to implement the apps and functionality it needed without relying on a partner, according to Taylor Wolsey, vice president of operations at Liberty.

These initial experiences in self-reliance set the stage for the widespread use of Zoho One's tools to adapt the Zoho environment to its specific needs, making Zoho One a key component in Liberty's growth. "Customization and automation are the strengths of Zoho One," Wolsey told EAC. "If I couldn't customize, I would be less confident" that the company's business needs were being met, Wolsey added.

2016: Zoho Inventory begins converting technicians' trucks into "rolling warehouses."

Total number of apps in use: 7

Number of users: 90

Once Liberty got rolling with Zoho One, it quickly proved its usefulness in supporting business innovation. The company added four Zoho One apps in 2016, including *Workdrive* for document storage and *Survey* for conducting phone and email surveys used to help sales and service meet customer expectations. One of the most impactful additions was the initial deployment of *Inventory*, which was used to manage the supplies on the trucks dispatched for installation and service calls. Ensuring the technicians had the right supplies to support specific customer needs, and helping Liberty know when to replenish supplies, have always been important components in both the company's operational efficiency as well as its customer support. With *Inventory*, Liberty was able to streamline this process at a key point of use, the truck itself: "Our warehouse is the technician's truck," Wolsey explained. The use of *Inventory* first added users in the operations and warehouse teams into the Zoho One userbase. Direct deployment to Liberty's field technician workforce would take place over the next several years.

2017-2020: Zoho *Sign* and *Forms* first introduced, along with *Desk*, *People*, *Social*, *Campaigns*, *Mail*, and *Learn*.

Total number of apps in use: 18

Number of users: 120 – Every employee uses Zoho One.

The ensuing three years saw a steady uptake of Zoho One at Liberty, with important consequences for productivity and cost-containment. In 2017, the vendor that Liberty had been using as its e-signing tool for contracts and services agreements decided to triple the cost of its service, and Liberty turned to Zoho *Sign* in response. This significantly increased the user base of Zoho One across two important internal lines of business: The sales team started using *Sign* directly for quotes and contracts, and HR started using *Sign* for gathering signatures on employment-related documents. Its use for HR functions effectively meant Zoho One had become an important resource for every employee at the company.

During this time period, *Forms*, which now has a similar widespread role in the technology toolkit of Liberty employees, started becoming a key tool in the development of standard processes across the company. Over the years, custom-built *Forms* have become essential components in a number of key processes, such as lead tracking, employee on-boarding and performance appraisals, workforce safety management, and uniform requests, among many others. “Every employee at some point uses *Forms*,” Wolsey told EAC.

Deploying *People* for HR management was another significant development in 2017, further cementing the fact that every employee had become a Zoho One user. In 2019 this was followed up by the deployment of *Learn*, which is used for training and on-boarding. Other apps deployed in this period included *Expense* for expense management and *Desk*, which was used to build a customer service-specific website. *Mail* was deployed to support some specific customer service and operations requirements, along with *Assist*, *Connect*, *Social*, *Campaigns*, and, for a limited time, *Sales IQ*.

THE GROWING USE OF ZOHU ONE INSIDE LIBERTY/GARDAWORLD

2015: *Books*, *CRM*, *Billings*

2016: *Cliq*, *Inventory*, *Workdrive*,
Survey

2017: *Sign*, *Forms*, *Desk*, *People*,
Expense

2018-2020: *Assist*, *Social*, *Campaigns*,
Mail, *Learn*, *Connect*, *Sales IQ*

2021 (Year Liberty acquired by
GardaWorld): *Z Projects*, *Backstage*,
Analytics

2023: *Creator*

2024: *DataPrep*, *Catalyst*,
FSM (possible future deployment),
Shifts (possible future deployment)

2021: Liberty is acquired by GardaWorld; *Projects*, *Analytics*, and *Backstage* deployed.

Total number of apps in use: 20

Number of users: 180 – Every employee uses Zoho One

The highlight of 2021 was the acquisition by GardaWorld, which brought Liberty into the family of a global leader in security and risk management. While Liberty’s use of Zoho One wasn’t directly responsible for the acquisition, the use of the suite was a significant factor in the efficiencies of Liberty’s business processes and its employees, according to Wolsey. “I think GardaWorld felt we

were well-run when they bought us,” Wolsey said. “When they looked under the hood, they saw how we onboarded clients [using Zoho *Forms*]. It was very automated. That helped.”

That same year Liberty added two important new Zoho One apps: *Projects* and *Analytics*. *Projects* was an important addition to the company’s commercial line of business and is used to manage the finances, billing, field delivery, and other key components of its installation projects. *Analytics* quickly became an essential tool at Liberty and is used by every employee at some point to report on finance, management KPIs, subscription and pipeline analysis, and inventory variance, among others.

Forms has become part of the growing use of Zoho One following the acquisition of Liberty by GardaWorld in 2021, a perfect example of how Zoho One’s breadth of capabilities helps expand its footprint and usefulness as a company’s needs evolve. For example, Liberty’s parent company approached Wolsey and team in 2023 for help managing some problems GardaWorld was having with cross-selling opportunities. The Zoho team solved the problem with a custom *Form* that became part of a cross-sell tracking process managed by Zoho *Flow*, with *Analytics* providing essential reports on progress to management.

2023: The Launch of *Creator*

Total number of apps: 21

Number of users: 200 – Every employee uses Zoho One

Liberty launched an important new effort to support new business processes and new opportunities with the deployment in 2023 of *Creator*, Zoho’s low-code application

KEEPING AN EYE ON CUSTOMIZATIONS AND GROWTH

The growth in the use of Zoho One has been undoubtedly positive for Liberty/GardaWorld and has contributed significantly to the company’s productivity over the years. Nonetheless, not everything worked well the first time, and some capabilities, like the ability to customize, come with a caveat, Wolsey told EAC.

The uncontrolled use of customization could lead to a problem with scaling the growth of Zoho One, Wolsey cautioned, and he added that other companies following Liberty’s path should carefully consider the long-term impacts associated with rampant customization. “Know where you want to go, and make sure you have the right structure,” Wolsey told EAC. “If you don’t know fully what you want, it can get ugly.”

Another important caveat has more to do with how Zoho was implemented, rather than any particular technical issue. “Our first iteration of *Forms* bombed,” Wolsey said. “There was only a five percent uptake.” But the issue was an internal one: “We were learning about how important change management was,” Wolsey acknowledged. That lesson stuck with Wolsey, and helped ensure that future projects paid more attention to change management issues and thereby met with an appropriate level of user acceptance more quickly.

Not every problem came from within Liberty. Other problems had to do with the pace of change within Zoho One itself. In some cases, Liberty had to wait for Zoho to catch up with the company’s needs, such as bringing Books up to speed with Canadian reporting requirements. Another issue involved limitations in reporting that have required the use of Analytics as a workaround.

The solution is a mix of patience and planning: Zoho works with customers to make sure that their requirements are understood and incorporated into new releases, and in the case of the reporting problem, the changes Wolsey is looking for are in the roadmap for a coming release.

development tool. The company uses *Creator* to develop sales documents that support Liberty's growing commercial business, a major new initiative that increases its footprint beyond its residential market roots. This time around Liberty is working with a partner to help with the new functionality, Wolsey told EAC.

2024: GardaWorld begins to integrate its Quebec operations to Zoho One.

Total number of apps: 25

Total number of users: 320 (projected)

The successful deployment of over 20 Zoho One apps in its Liberty Security division has led GardaWorld to begin the deployment of Zoho One to the employees in its Quebec offices, a fast-growing region due to recent acquisitions. The goal of the on-going project is to bring the same functionality and productivity that Liberty has enjoyed in its Quebec offices while supporting the integration of Quebec's operations to other GardaWorld regions, yet more evidence of the multiplicative effect of Zoho One in a dynamic business.

Two new apps are being deployed as part of this effort: *DataPrep* is being used to manage disparities in customer data so that operations can be better integrated around a consolidated master customer record; and *Catalyst*, Zoho's comprehensive application development environment, is being deployed to support professional-level development efforts. The company is also exploring the future use of Zoho One's field service management (*FSM*) app as well as its employee scheduling and time management app, *Shifts*.

Several new business initiatives are part of this effort, including a new division focused on the parking systems market that is to be run using Zoho One. GardaWorld is also deploying a Zoho *Form* to support cross-leasing in the Canadian market between its different divisions, and *Analytics* is being used by other GardaWorld divisions as well, Taylor said.

GardaWorld is also looking into integrating *Payroll*. While the final integration strategy is still being worked out, Zoho's flexibility regarding integration with non-Zoho software is helping expand the options available to GardaWorld, according to Taylor.

Conclusion: The Triumph of an Integrated, Comprehensive Suite

During the nine years since Liberty Security first started its Zoho One journey with *CRM*, the company's business growth has been marked, almost step by step, by the growth of its use of Zoho One. Liberty's acquisition by GardaWorld has continued that side-by-side growth trajectory, and Zoho One is poised to continue its role as GardaWorld continues its ambitious business expansion, which include a plan to grow 300 percent in coming years.

The expansion that Zoho One has supported over the years gives Wolsey the confidence that the suite can keep up with his company's ambitious plans. Since its initial use in 2015, Zoho One has grown from supporting 40 initial users to all of the 300+ employees at the company, and along the way Zoho One has helped Liberty grow its user base to over 30,000 customers while expanding into lucrative new markets such as commercial security systems. The individual savings, while small,

can add up. Automating inventory management using Inventory has helped save the company thousands of dollars in inventory management and tracking cost, while significantly improving service call success. Even small innovations add up: The company's development of a *Form* to handle customer on-boarding has saved Liberty over \$40,000, according to Wolsey.

Companies like Liberty and its parent company GardaWorld have an extraordinary range of strategic choices in how to marry their technology strategy to their need for business innovation and growth. The main strategic tension most companies grapple with is between the perceived need for market-leading best of breed applications and the very real need for business process and data integration, supported by common user experiences. The enterprise software market has been tilted towards the former over the years, fueled in part by a mistaken impression that the value of having a best of breed application for every business need will obviate the problems of siloed business processes, siloed data, and the change management and user experience problems that are endemic to that approach.

In reality, most best-of-breed applications users consume only a fraction of the breadth of functionality these applications offer while struggling to overcome the inherent complexity of having multiple data models and multiple user experiences underpinning disconnected business processes. The extraordinary inefficiencies that come from assembling multiple best-of-breed applications are exacerbated in a cloud-based world in which these applications are continually upgraded by their respective vendors with no regard for the need to support these applications' ability to integrate with the rest of a customer's application portfolio. Adding insult to injury is the premium price customers must pay not just for the applications themselves but for the added burden of maintaining the necessary data and process integration needed to optimize their use in support of business innovation and growth.

The example of Liberty and GardaWorld provides a welcome new perspective to this long-standing enterprise software imperative. As this report shows, it's possible to implement a comprehensive software suite that supports the growth of a business over the course of many years and through changes as significant as the development of new user cases, business models and even an acquisition.

Along the way, Zoho One has been able to support the growth of its enterprise customers without requiring significant allocations of new resources and budget. For these customers, among them Liberty and now GardaWorld, the productive value of Zoho One has increased in ways that would have largely been impossible to imagine using a best-of-breed approach. While every company's business needs and ability to translate them into technology is different, the Zoho One approach bears consideration as a unique way to solve an age-old productivity problem no company can afford to leave unresolved.