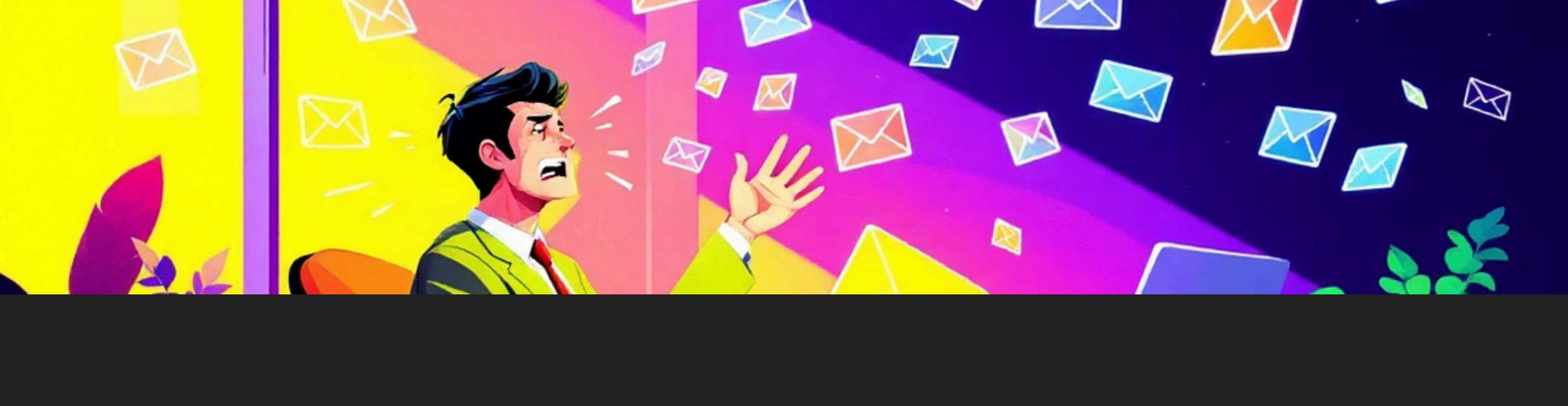




# Zoho AI-SDR: Intelligent Lead Qualification

Automating lead qualification using Zoho Mail, CRM, Zia, and Catalyst—entirely within the Zoho ecosystem.



## CHAPTER 1

# The Lead Qualification Problem

## Manual Processes Slow Teams Down

Sales teams spend hours sifting through email replies, manually updating CRM records, and prioritizing follow-ups. This process is inconsistent, error-prone, and doesn't scale as lead volume grows.

## Wasted Time on Poor Leads

Without intelligent filtering, reps chase unqualified prospects while high-intent leads wait. The result: missed opportunities, lower conversion rates, and frustrated sales teams.

# Four Critical Challenges

## No Real-Time Intelligence

Email replies aren't analyzed immediately. Teams lack visibility into lead sentiment and intent as conversations happen.

## Manual CRM Updates

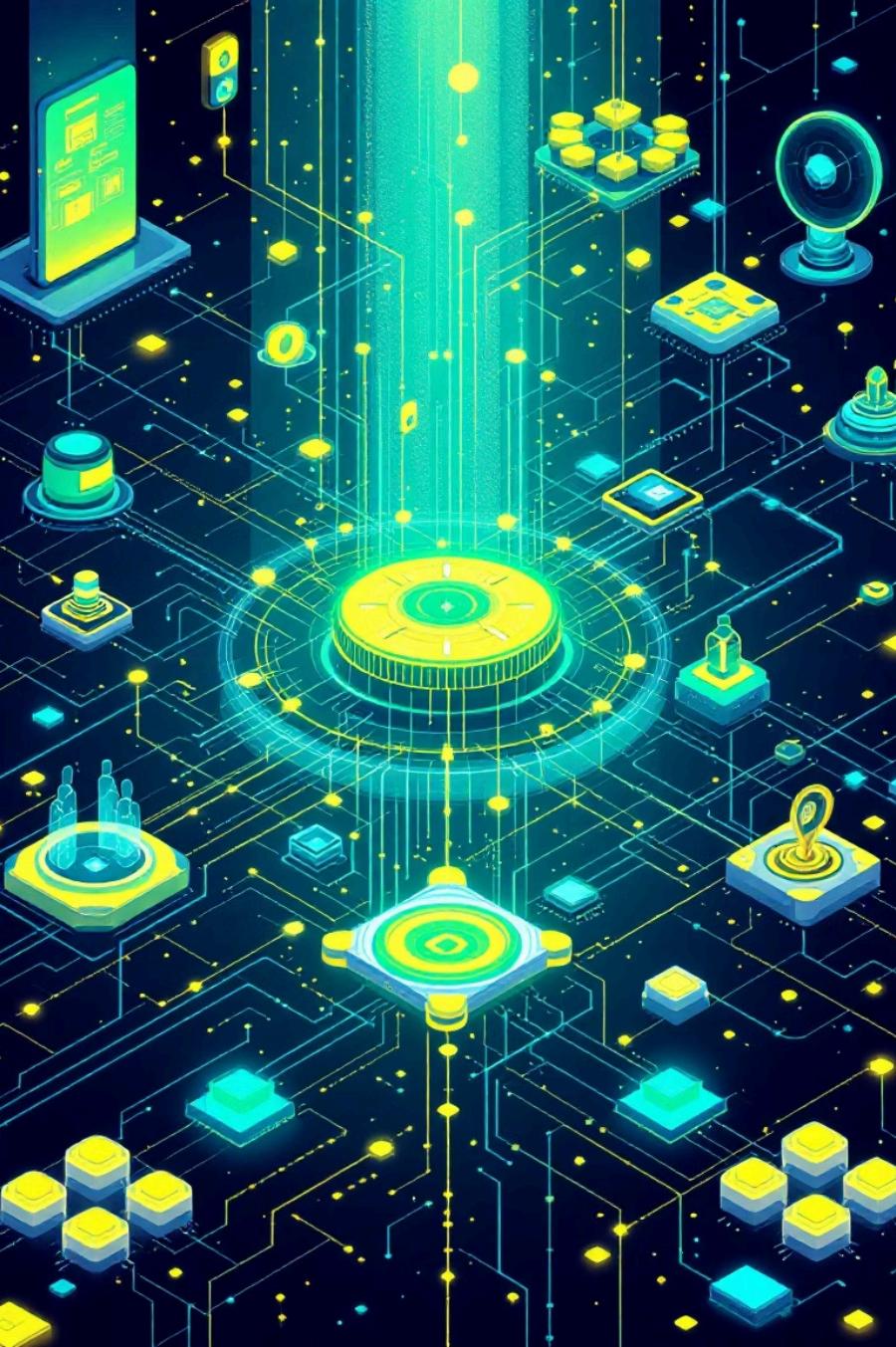
Reps must remember to log every interaction, update deal stages, and create tasks. Critical data gets lost or delayed.

## Poor Follow-Up Prioritization

Without clear signals, teams struggle to identify which leads need immediate attention versus which can wait.

## Compliance Risks

Unsubscribe requests and complaints buried in email threads create legal exposure when not handled promptly.



## CHAPTER 2

# Our Solution: AI-Powered SDR Automation

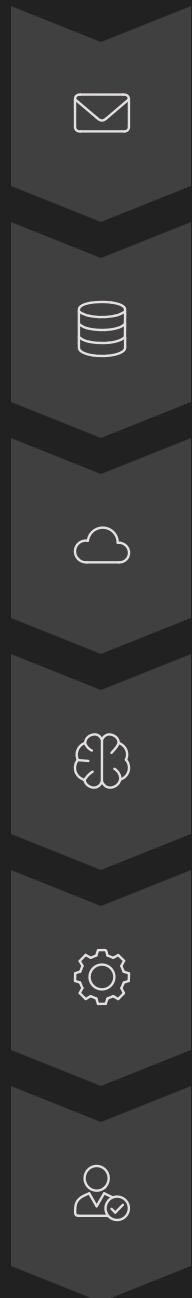
Zoho AI-SDR is an intelligent assistant that reads every email reply, understands intent using Zia, and takes appropriate CRM actions automatically. It runs entirely within Zoho's ecosystem—no external APIs, no data leaving your environment.

The system combines AI analysis with deterministic business rules to ensure reliable, auditable, and compliant lead management at scale.

## Built With

- Zoho Mail for email integration
- Zoho CRM for data and workflows
- Zoho Zia for AI intelligence
- Zoho Catalyst for serverless logic

# System Architecture



## Zoho Mail

Incoming reply triggers webhook

## Zoho CRM

Lead context retrieved

## Catalyst

Serverless function processes event

## Zia AI

Analyzes sentiment and intent

## Decision Engine

Determines action

## CRM Update

Automated workflow executes

- Event-driven architecture ensures real-time response with full audit trail and zero manual intervention.

# AI Intelligence Layer

## Zia-Powered Analysis

Every email reply passes through Zia's sentiment and intent classification models. The system doesn't just detect positive or negative sentiment—it understands specific intent categories that map directly to sales actions.

This analysis happens in milliseconds, providing instant intelligence that would take humans minutes to assess manually.



### POSITIVE\_INTEREST

Ready to engage, wants demo or next steps

### NEED\_MORE\_INFO

Interested but has questions or concerns

### NOT\_INTERESTED

Declining offer, not a fit right now

### COMPLAINT

Issue or dissatisfaction expressed

### UNSUBSCRIBE

Explicit opt-out request detected



# Decision Engine Logic

## 1 Intent Classification

Zia determines primary intent from email content and context

## 2 Rule Evaluation

Business rules check lead score, previous interactions, account status

## 3 Action Determination

Engine selects appropriate CRM workflow based on combined analysis

## 4 Execution

Automated actions execute with full logging for audit and review

The decision engine combines AI insights with deterministic business logic. This hybrid approach ensures explainable outcomes—no black-box automation. Every decision can be traced, reviewed, and refined.

# CRM Automation in Action



## Auto Deal Creation

When positive intent is detected, the system creates a deal, assigns it to the right rep, and sets the appropriate stage based on conversation context.



## Task Assignment

Follow-up tasks are automatically created with priority levels, due dates, and context notes pulled from the email thread.



## Lead Suppression

Not-interested leads are moved to a suppression list, preventing future outreach while preserving the relationship for later.



## Compliance Handling

Unsubscribe and complaint intents trigger immediate opt-out processing, ensuring regulatory compliance and protecting brand reputation.



## CHAPTER 3

# What Makes This Innovative



## 100% Zoho-Native

No external dependencies, APIs, or third-party services. Everything runs inside your Zoho environment with complete data sovereignty.



## Explainable AI

Every AI decision includes confidence scores and reasoning. Teams can review, override, or refine the logic without technical expertise.



## Enterprise Audit Logs

Complete activity history for compliance, debugging, and optimization. Track every email, decision, and action with timestamps and context.

# Impact & Next Steps

**3x**

**40%**

**20h**

**100%**

## Faster Response

Immediate analysis and action  
versus hours of manual review

## Higher Conversion

Hot leads get instant attention  
when engagement is highest

## Time Saved Weekly

Per sales rep through  
eliminated manual CRM  
updates

## Compliance Rate

Zero missed unsubscribes or  
complaint escalations

## Scalable & Secure

Built on Zoho Catalyst's serverless infrastructure, the system  
scales automatically with your lead volume. No infrastructure to  
manage, no performance degradation.

## Ready for Production

Designed for the Zoho ecosystem from day one. Deploy across  
teams, customize rules per business unit, and integrate with  
existing Zoho workflows seamlessly.