



The agentic revolution: Humans, AI, and business



The agentic era is well upon us

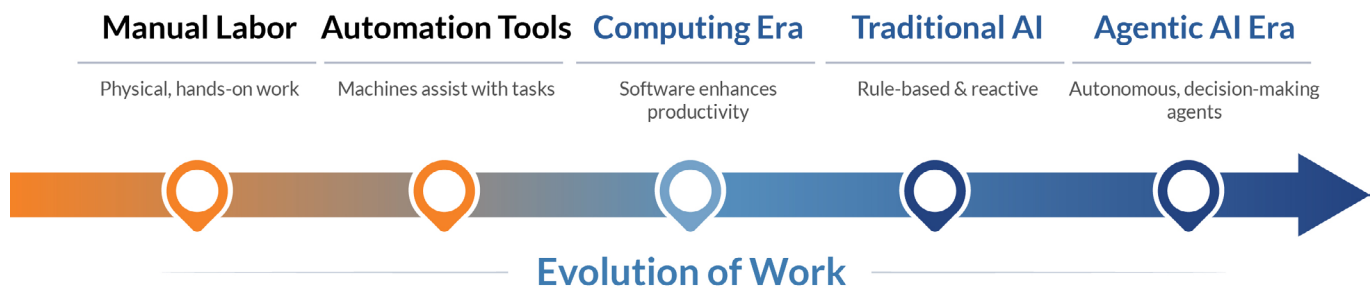
Many years ago, work was primarily based on manual labor. Over time, automation began to enter our daily lives through tools and machines, which gradually decreased the need for physical labor in many areas and helped people complete time-consuming and effort-intensive tasks more efficiently.

The advent of computers further enhanced these productivity gains as hardware and software helped virtually all industries simplify and accelerate large numbers of tasks—which in turn has enabled us to see better yields for our efforts.

Artificial intelligence (AI) marks the first step towards computers being able to think like humans. Unlike automation, which generally requires rigidly defined conditions, AI can accomplish more dynamic and contextual tasks with less need for human intervention.

Today, AI has moved far beyond simple assistance; it can now provide support, make decisions, carry out tasks under human oversight, or even manage business operations autonomously. We refer to this version of AI as agentic AI. You can build numerous AI agents that function like human employees and which are capable of thinking and acting on business tasks just as humans do.

Agentic AI has become increasingly common in businesses, where many functions—such as chatting with users, composing emails, and assigning tasks and owners—are being delegated to AI agents. Agentic AI has truly arrived in our lives.

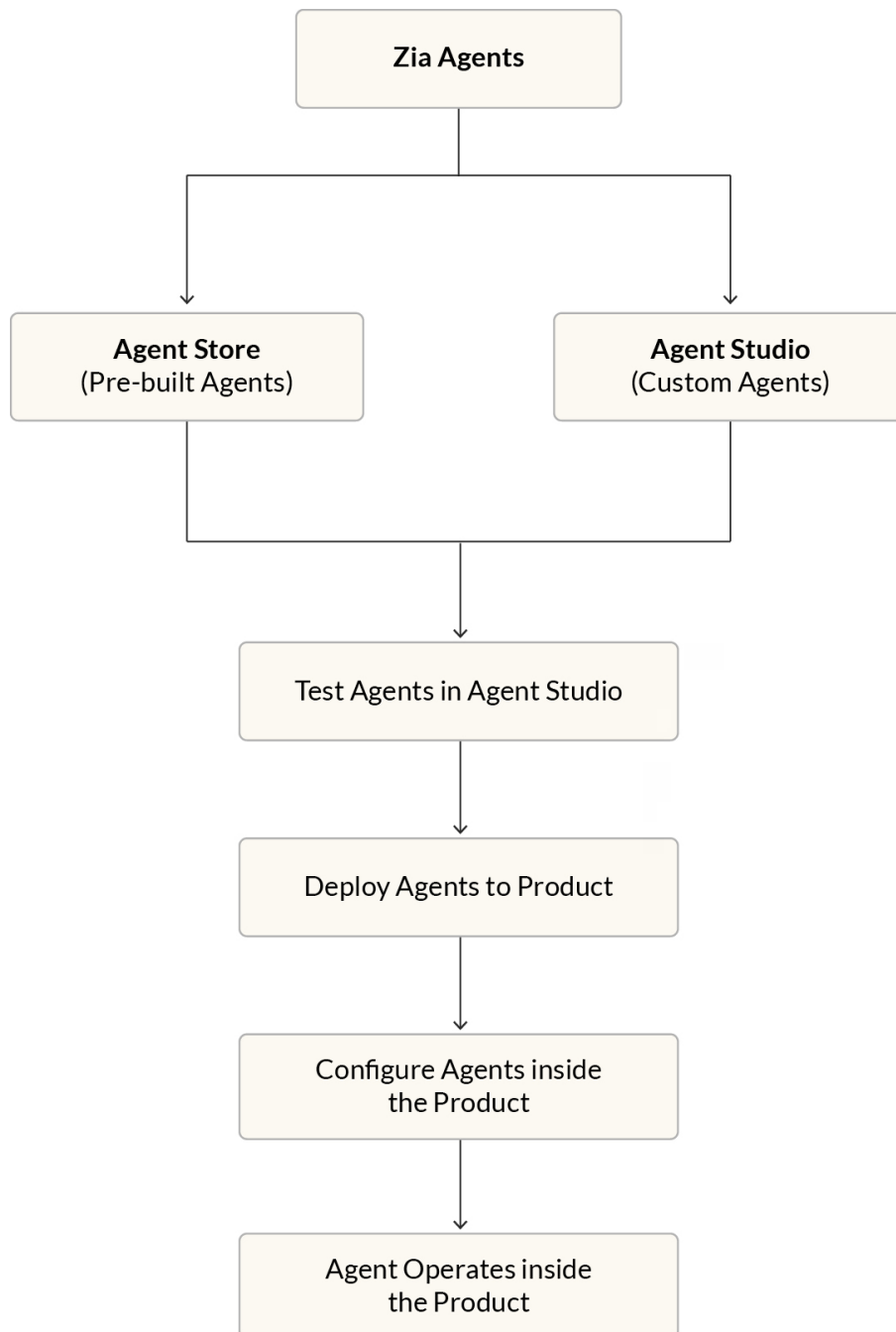


Zia Agents: Zoho's agentic solution

Zoho offers agentic AI in the form of Zia Agents: an agentic platform from which you can leverage a wide variety of AI agents to help with your business tasks. These AI agents are available to you in the following forms:

- **Agent Store** - The agent store serves as a marketplace featuring a range of ready-to-use AI agents designed for various business needs. All you need to do is deploy the required agents in the product in which you need them to function. Once deployed, you can use the selected agent's capabilities in that product directly.

- **Agent Studio** - If your business needs are unique, you can build your own custom agents using the Agent Studio interface—either by defining your own criteria or by asking Zia to generate a custom agent that aligns with your specific needs. Once done, you can deploy the created agent to the relevant product and start using it as one of your employees.



Dispelling skepticism around AI agents

Reliability

One standard concern about AI agents is their reliability. Since agentic technology is still evolving, people worry that it may not always perform tasks accurately. It's true that AI models can sometimes generate incorrect responses or hallucinate, which makes users hesitant to rely on them for important workflows.

However, AI agents operate within structured workflows and rely on tools such as databases, APIs, and knowledge sources to verify information before acting. You can also add validation checks, monitor these systems, and oversee these agents where needed. This means AI agents execute tasks within controlled environments designed to improve accuracy and consistency.

Complexity

Another concern is that building AI agents requires deep expertise in AI and advanced programming skills. In fact, you can build AI agents using ready-to-use APIs, reusable components, and low-code or no-code platforms. This means you can focus more on defining workflows and solving real problems than on building complex AI systems from scratch.

Security

Since agents interact with multiple systems—tools, databases, or APIs—a common concern is that they could misuse access, expose sensitive data, or be exploited through malicious inputs. However, security concerns in computer systems are nothing new, and can be managed with proper design and safeguards.

AI agents in particular can be effectively managed by limiting access to essential data and operations, using secure authentication methods, monitoring activity through logs, and setting up approval layers for sensitive actions. You can also test agents before implementation and continuously audit their behavior to ensure a secure agentic experience.

Replacing humans

As AI agents become more capable of handling tasks independently—tasks such as data processing, report generation, communication responses, and more—there’s a growing concern that they could reduce the need for human workers, especially in roles that involve repetitive or rule-based activities.

However, using agents to take over routine tasks enables humans to focus on higher-value work that requires human judgment and expertise. Rather than eliminating the need for humans, autonomous agents are more likely to transform how work is done—making humans more effective and enabling organizations to achieve faster and better outcomes.

Build an agent or two—or a team!

How can you create the most optimal agents for your business? Do the following:

- Outline in detail the needs for which you require one or more agents. This ensures there are no ambiguities, errors, or mismatched expectations about what you require from your agents.
- Clearly decide how you want to distribute the activities—i.e., whether you want a single agent to handle everything or to split tasks among multiple agents. While a single agent can be helpful with simple and straightforward tasks, for more extensive operations that involve a lot of parallel tasks, you might be well-served to use multiple agents.

- Identify and upload all the information that's relevant to your AI agent's ability to learn and execute its tasks. A high-quality and extensive knowledge base, for example, enhances your agents' accuracy and efficiency.
- Ensure the product in which you plan to deploy your agent has the data your agent will need to perform its functions. Just as you can accomplish tasks only when you have the data relevant to that task, the same is the case with your agents.
- Map your agents' capabilities to the right modules and fields in the product.
- Clearly define roles and permissions in the product for each of your agents.

Let's explore a real-life example of Zia agents in action at a hospitality business.

A typical playbook for hosting guests

You run a hotel business and offer a variety of rooms to cater to various types of customers. You already use Zoho CRM to streamline your business tasks, such as processing inquiries, booking rooms, collecting reviews, and so on. The various stages that comprise your business are as follows:

- Room inquiry
- Room booking
- Check-in
- Room stay
- Checkout and review

You can deploy Zia Agents to take care of activities in various stages of your business and ease your workload without compromising on customer service and satisfaction. This doesn't mean that AI completely replaces you; you're still there to serve your customers, but now you have Zia Agents that serve you so you can serve your customers more effectively. Let's look at how.

Your AI agent squad

- Booking agent
- Check-in agent
- Service agent
- Checkout agent

Like we saw earlier, you can either leverage pre-built agents from the Agents Store or create your own agents using Agent Studio to address your hotel needs. In this case, since the needs are specific to your hotel, you can create your own custom agents using Agent Studio.

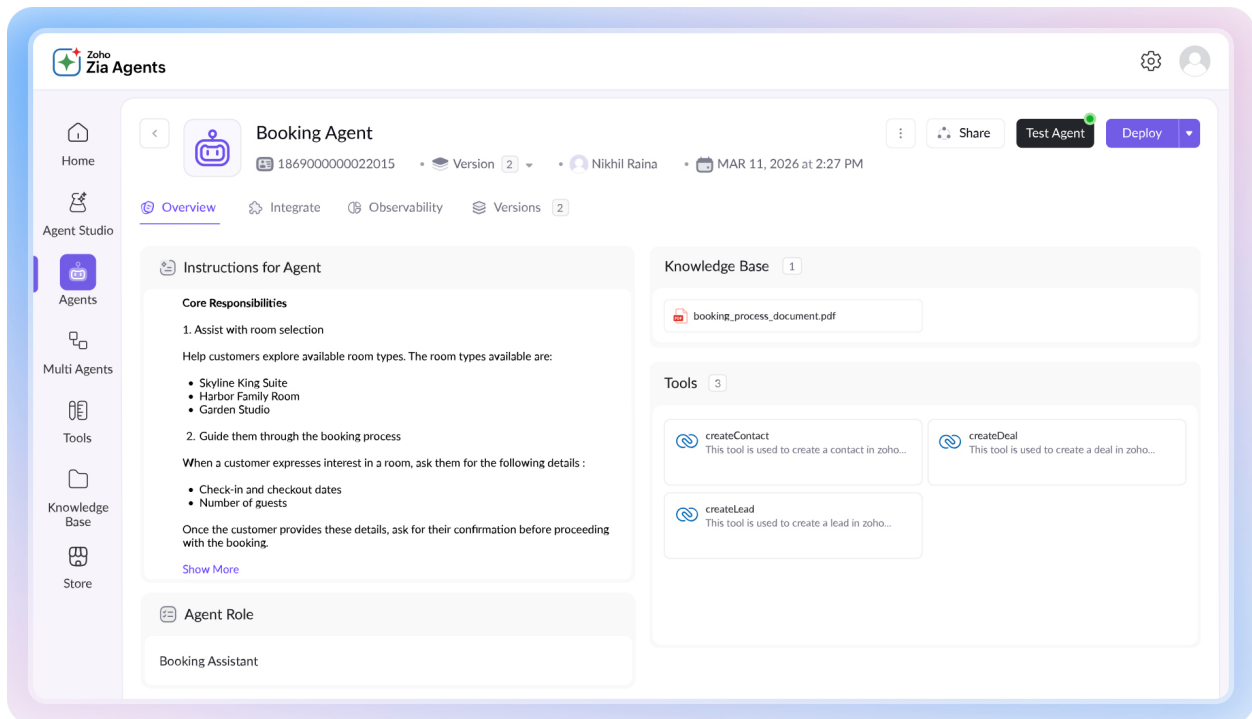
You can provide instructions to your agents about their responsibilities, assign roles to them, add knowledge base articles to enhance your agents' learning, select the backend model, and include the tools required for your agents to perform their instructed actions.

Once you have created your agents, you can deploy them into Zoho CRM. You can generally deploy agents either as connections or as digital employees. When you deploy an agent as a connection, the agent takes over its defined activities in your CRM with the identity of one of your human agents after authentication.

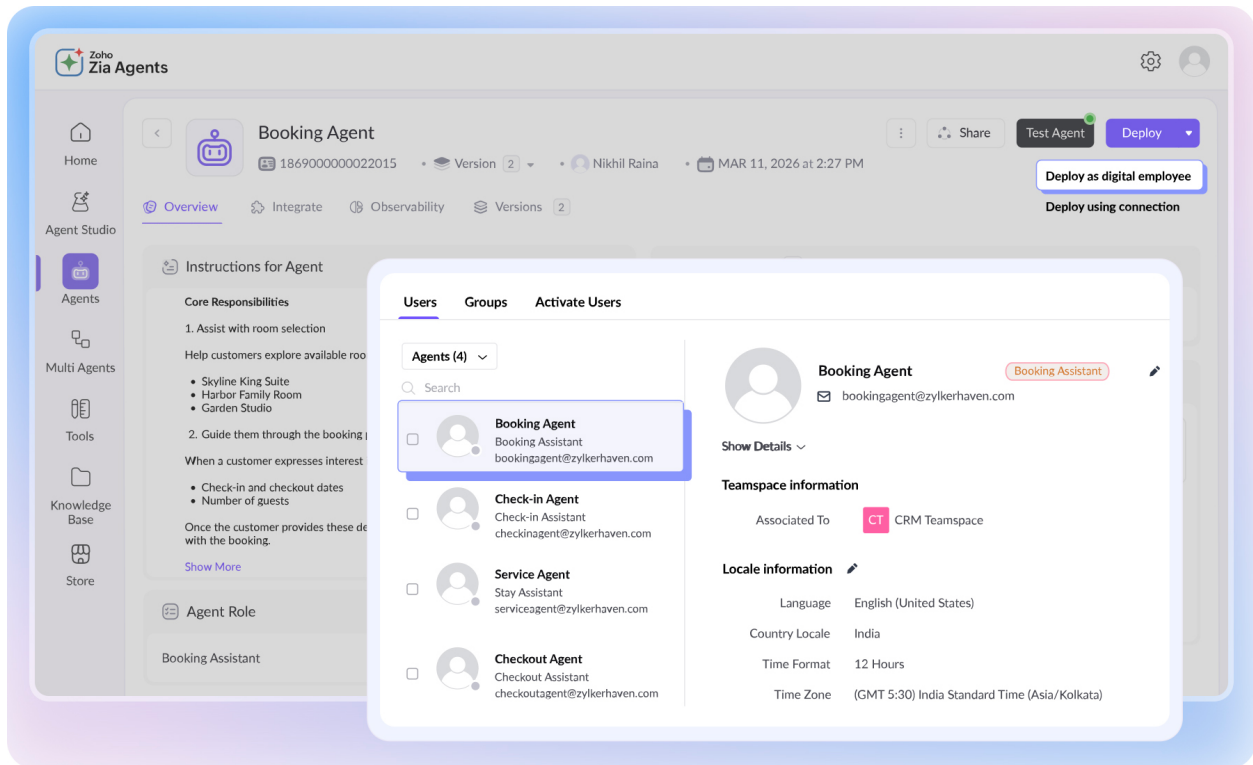
When you deploy an agent as a digital employee, the agent is added as a separate user in your CRM and operates autonomously. In this example, you will be deploying your agents as digital employees where your agents will be performing their duties with their own identities.

Booking agent

Overview

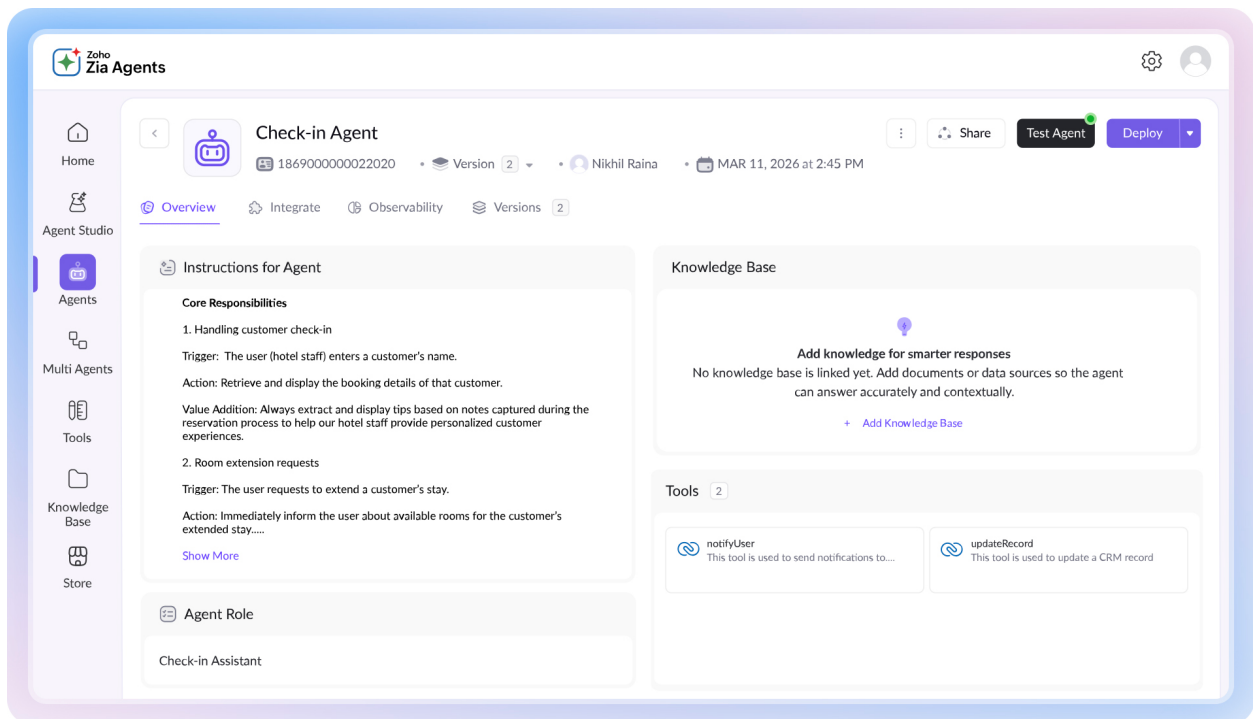


Deployment

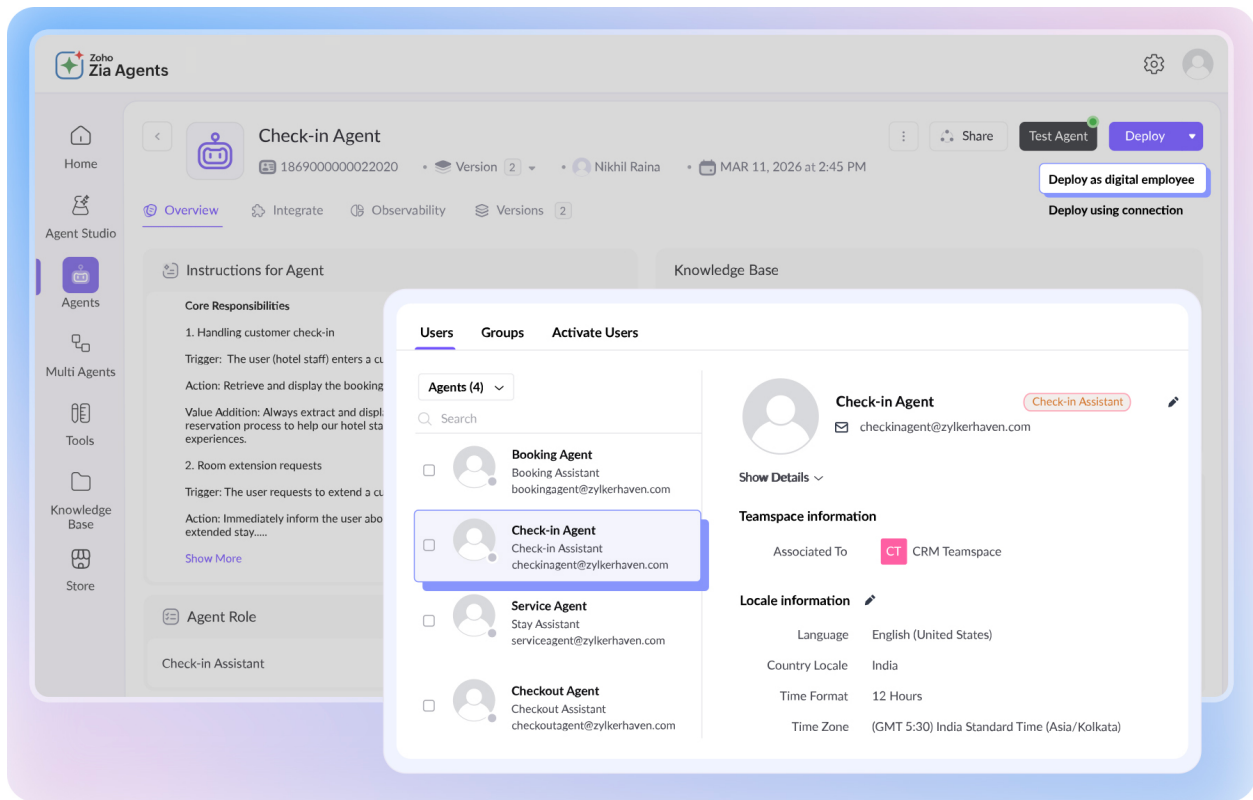


Check-in agent

Overview

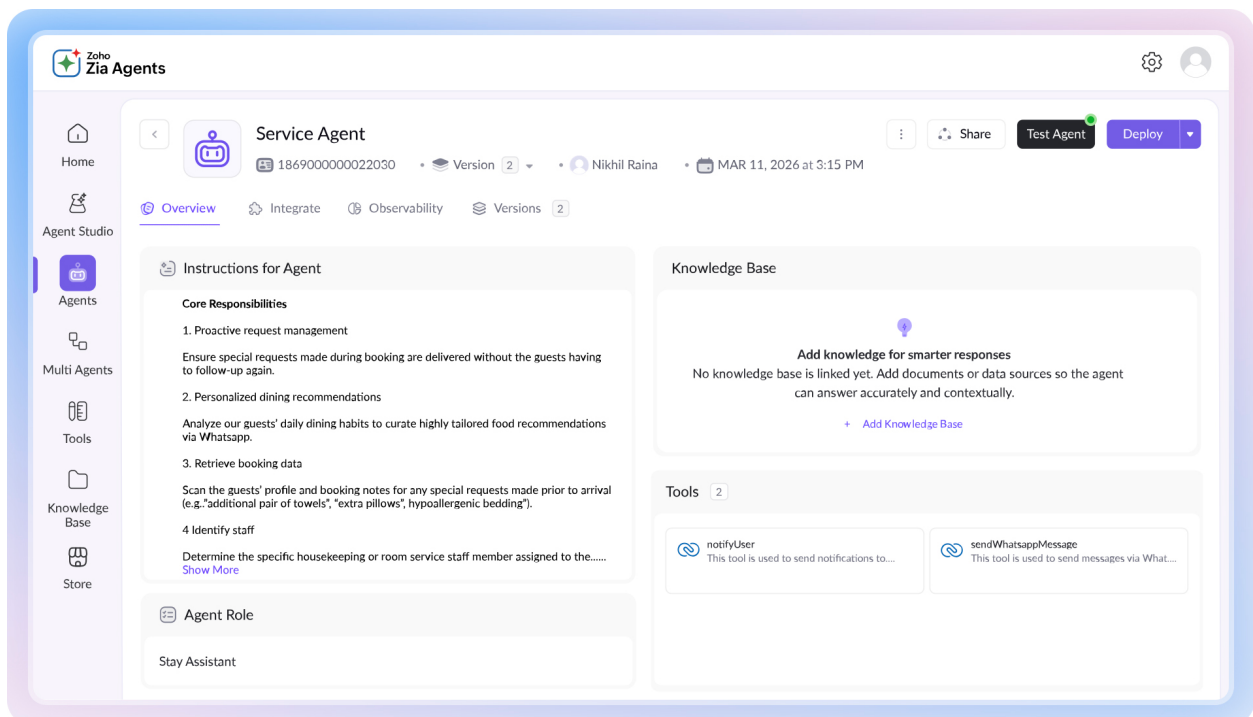


Deployment

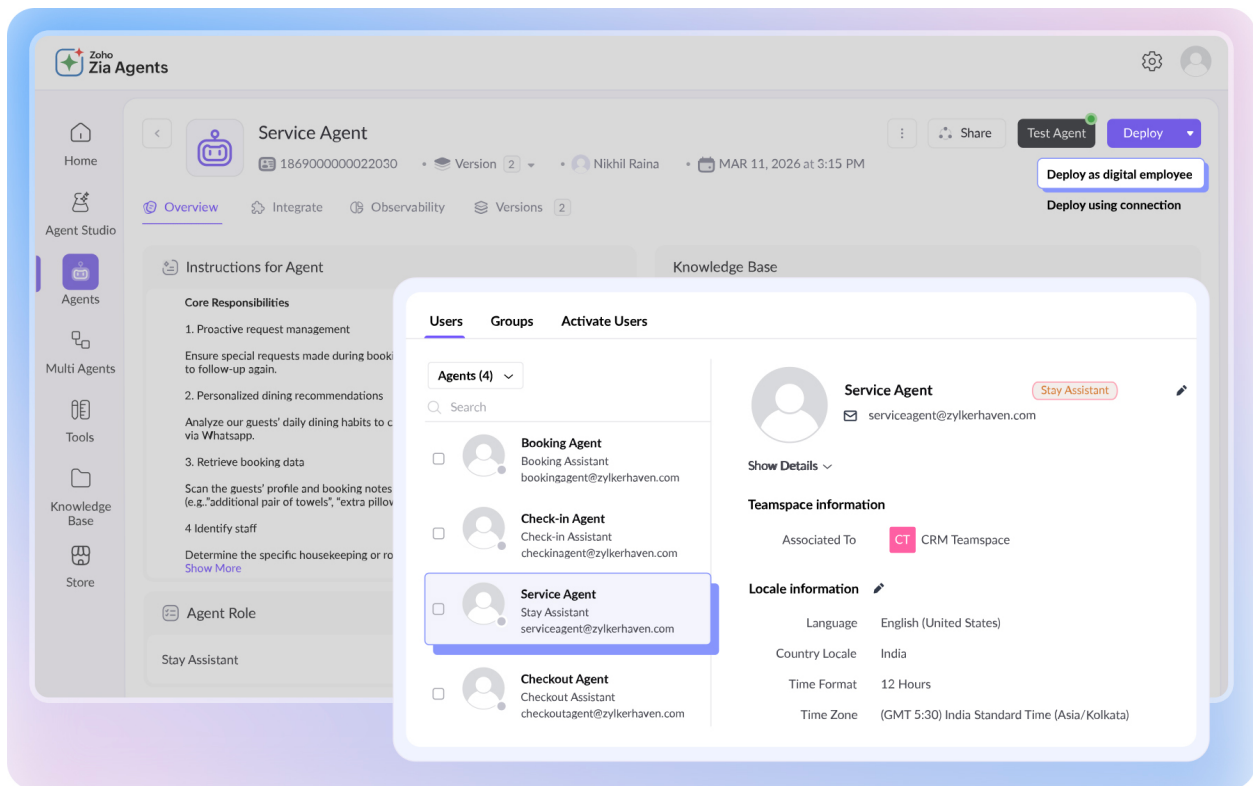


Service agent

Overview

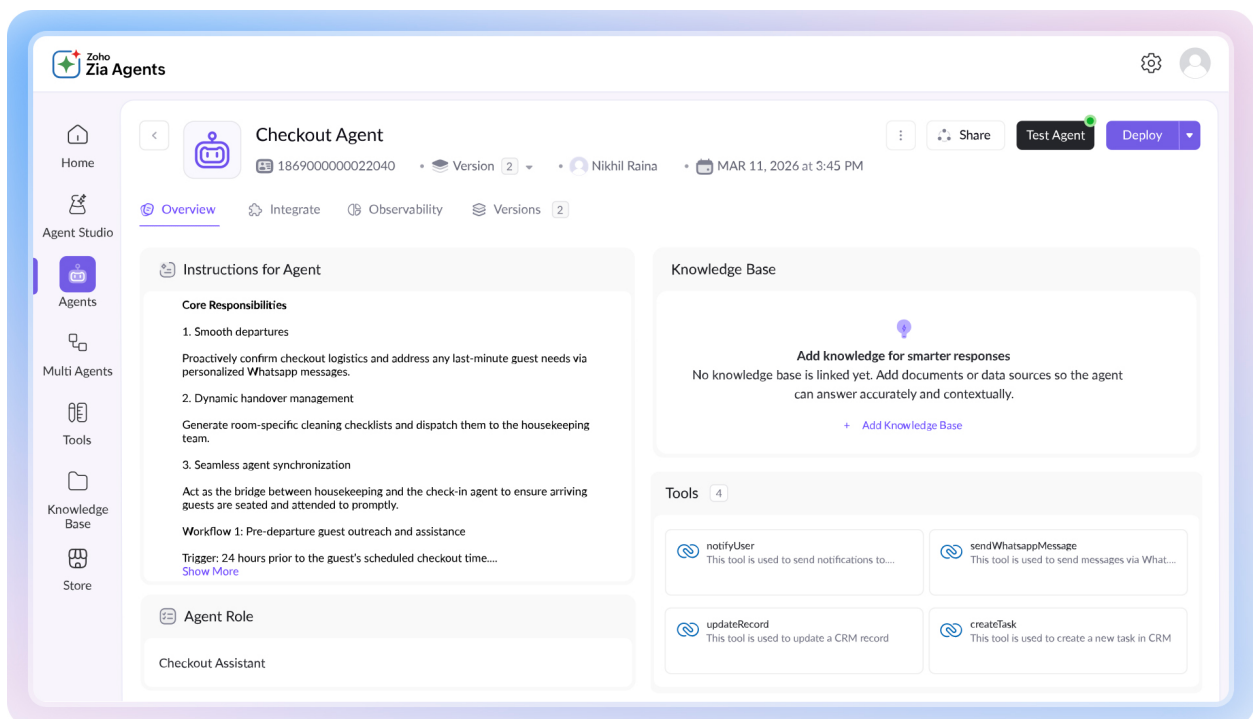


Deployment

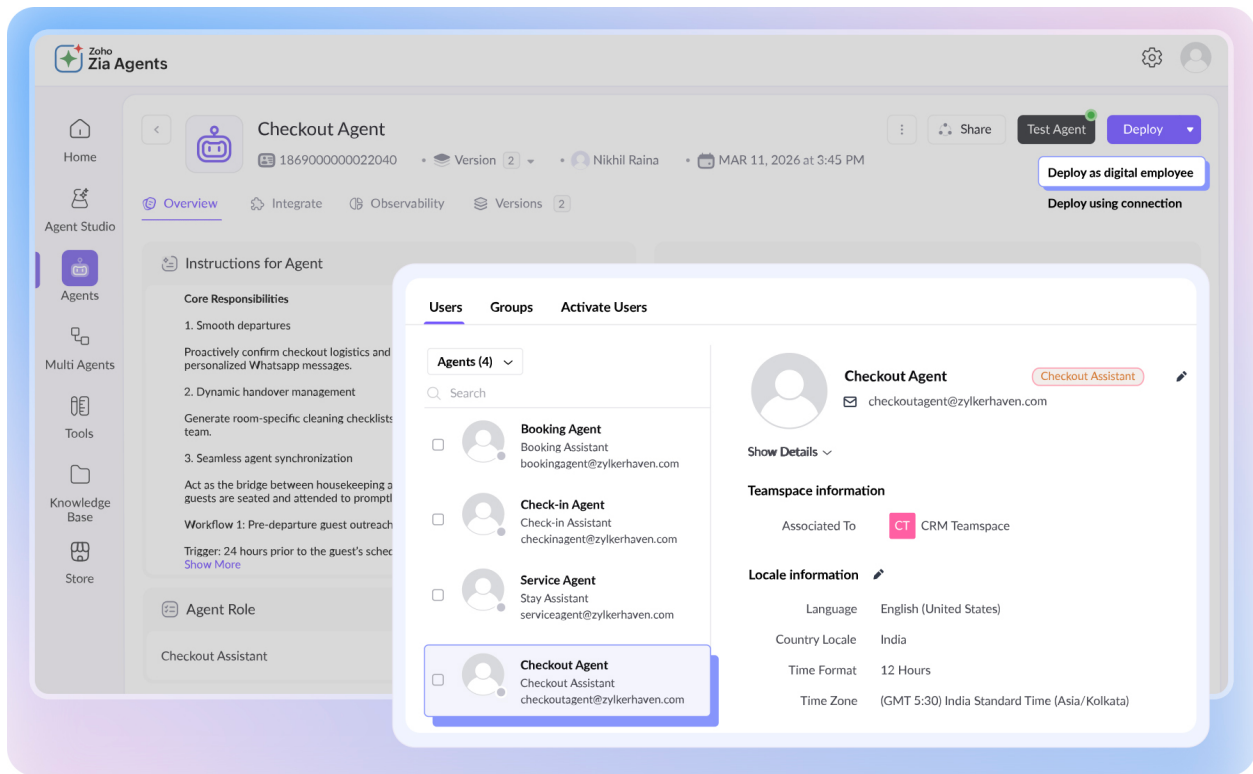


Checkout agent

Overview



Deployment



An agentic day in your business

AI Agent Squad



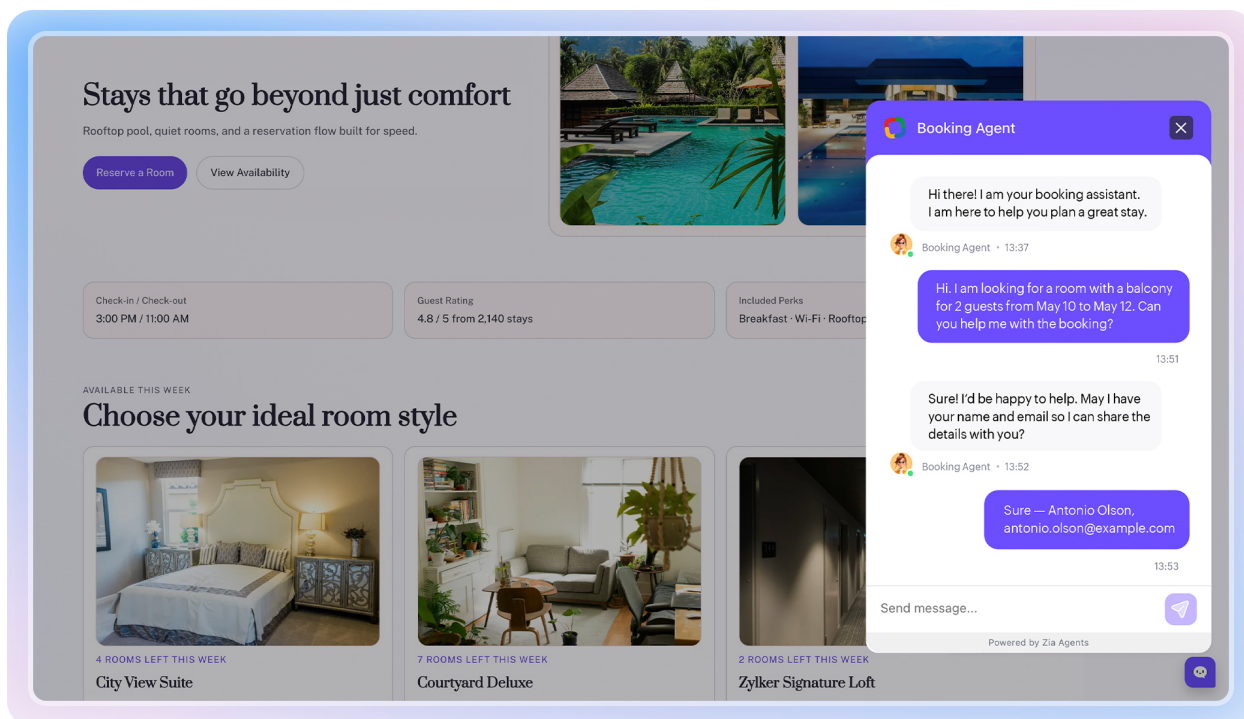
The booking

After doing thorough research, a potential customer shortlists your hotel to book a stay and lands on your website. While they can browse your website to find the information they need, you've already incorporated your booking agent in the form of a bot on your site.

The customer simply enters their exact query with respect to factors like room availability, their preferences, travel dates, and the number of guests. Their information will be added as a lead in Zoho CRM.

Based on their inputs, your booking agent can instantly make a booking for them. Customers don't have to look for information or check availability; your agent can simply do it for them. Once they book their stay, they'll be converted into a contact, and when they book in future, their contact details will be modified accordingly.

Antonio puts forward his queries to the booking agent



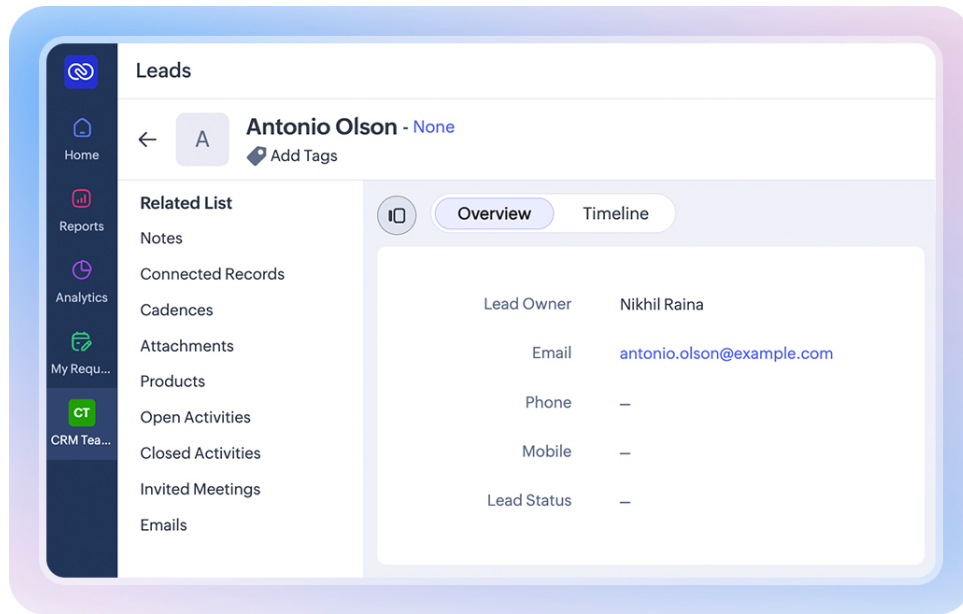
The screenshot shows a hotel website interface with a chatbot overlay. The website content includes:

- Stays that go beyond just comfort**: Rooftop pool, quiet rooms, and a reservation flow built for speed. Buttons: Reserve a Room, View Availability.
- Check-in / Check-out**: 3:00 PM / 11:00 AM
- Guest Rating**: 4.8 / 5 from 2,140 stays
- Included Perks**: Breakfast · Wi-Fi · Rooftop
- AVAILABLE THIS WEEK**
- Choose your ideal room style**:
 - City View Suite**: 4 ROOMS LEFT THIS WEEK
 - Courtyard Deluxe**: 7 ROOMS LEFT THIS WEEK
 - Zylker Signature Loft**: 2 ROOMS LEFT THIS WEEK

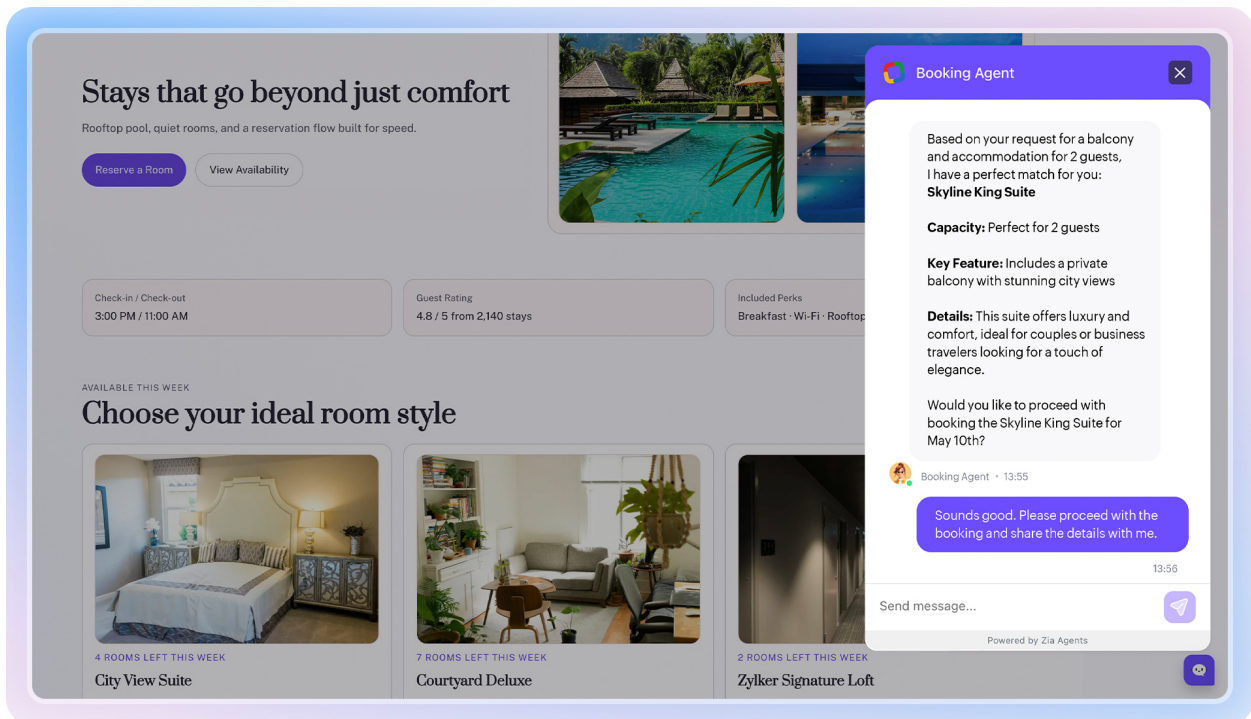
The chatbot overlay, titled "Booking Agent", shows the following conversation:

- Booking Agent: Hi there! I am your booking assistant. I am here to help you plan a great stay.
- Booking Agent: 13:37
- Antonio: Hi. I am looking for a room with a balcony for 2 guests from May 10 to May 12. Can you help me with the booking?
- 13:51
- Booking Agent: Sure! I'd be happy to help. May I have your name and email so I can share the details with you?
- Booking Agent: 13:52
- Antonio: Sure — Antonio Olson, antonio.olson@example.com
- 13:53
- Send message...
- Powered by Zia Agents

Antonio gets added as a lead in Zoho CRM



Antonio confirms his booking to the booking agent




Stays that go beyond just comfort
 Rooftop pool, quiet rooms, and a reservation flow built for speed.

[Reserve a Room](#) [View Availability](#)


Check-in / Check-out: 3:00 PM / 11:00 AM | Guest Rating: 4.8 / 5 from 2,140 stays | Included Perks: Breakfast · Wi-Fi · Rooftop

AVAILABLE THIS WEEK


Choose your ideal room style



4 ROOMS LEFT THIS WEEK
City View Suite



7 ROOMS LEFT THIS WEEK
Courtyard Deluxe



2 ROOMS LEFT THIS WEEK
Zylker Signature Loft

Booking Agent [Close]

Sure. Please provide your contact number to process the booking.

Booking Agent · 13:58

555-555-5555

14:00

Great! I have processed your request for the **Skyline King Suite** from **May 10 to May 12**.

Here are your booking details:
Room Type: Skyline King Suite
Check-in date: May 10
Checkout date: May 12
Guests: 2
Status: Confirmed

To complete the reservation, could you please let me know if you have any special requirements?

Booking Agent · 14:01

Send message... [Send]

Powered by Zia Agents


Stays that go beyond just comfort
 Rooftop pool, quiet rooms, and a reservation flow built for speed.

[Reserve a Room](#) [View Availability](#)


Check-in / Check-out: 3:00 PM / 11:00 AM | Guest Rating: 4.8 / 5 from 2,140 stays | Included Perks: Breakfast · Wi-Fi · Rooftop

AVAILABLE THIS WEEK


Choose your ideal room style



4 ROOMS LEFT THIS WEEK
City View Suite



7 ROOMS LEFT THIS WEEK
Courtyard Deluxe



2 ROOMS LEFT THIS WEEK
Zylker Signature Loft

Booking Agent [Close]

I would like a couple of extra towels for my stay.

14:08

Excellent! Your booking is now complete.

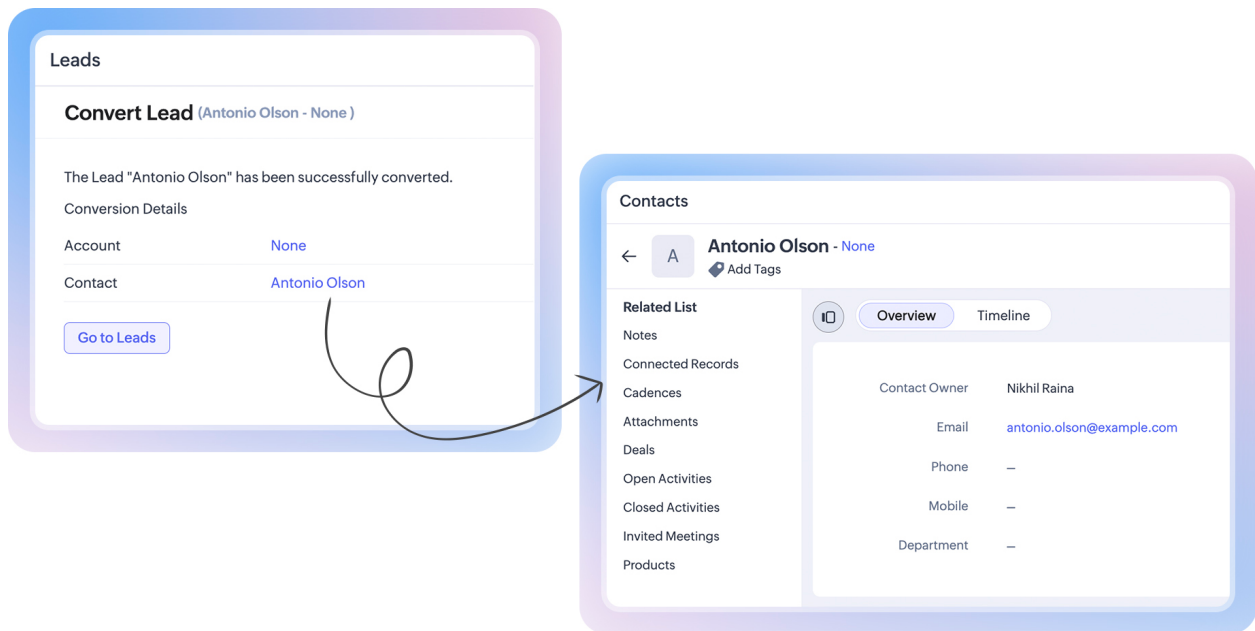
Final Confirmation:
Room: Skyline King Suite
Check-in date: May 10
Checkout date: May 12
Guests: 2
Special Requirement: Extra towels added
 Thank you for choosing us, and I hope you have a wonderful stay!

Booking Agent · 14:09

Send message... [Send]

Powered by Zia Agents

Antonio is converted into a contact in Zoho CRM upon confirming his booking

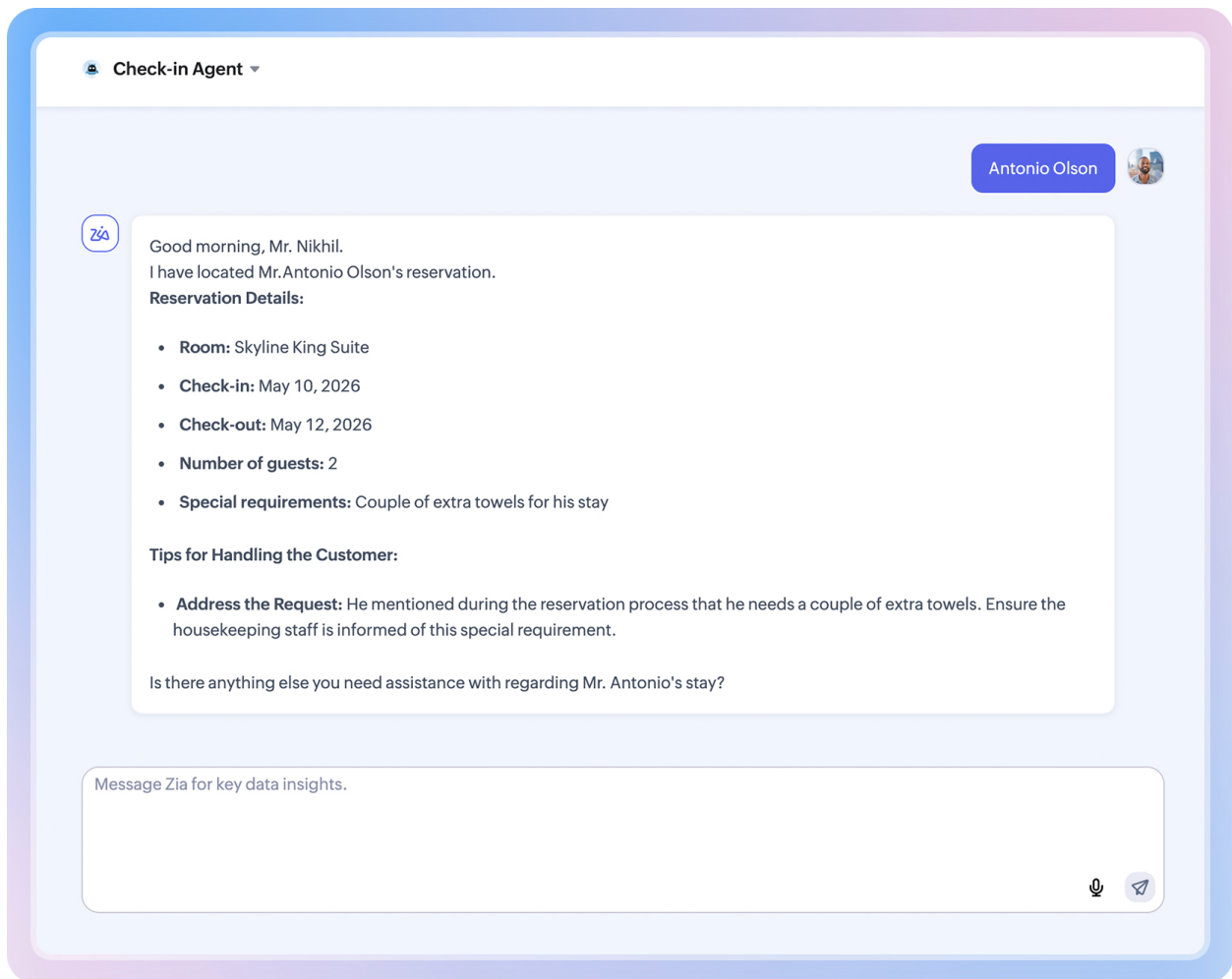


The arrival

The customer arrives at your hotel for check-in and your check-in agent quickly provides you with all their booking details. But there's a minor problem: The customer has extended their stay and needs a room for one more day, but the room they booked isn't available after their checkout period.

Based on the information you've received from your customer, your check-in agent can suggest the most suitable room available for the extended time that they requested in seconds. You proceed to book the room your check-in agent has suggested and assign it to your customer for their extended stay.

Your check-in agent instantly fetches you Antonio's booking details when he arrives to check-in



The screenshot displays a chat interface with a header "Check-in Agent" and a dropdown arrow. On the right, a blue button labeled "Antonio Olson" is next to a profile picture. A message from "Zia" (indicated by a circular icon) contains the following text:

Good morning, Mr. Nikhil.
I have located Mr. Antonio Olson's reservation.

Reservation Details:

- **Room:** Skyline King Suite
- **Check-in:** May 10, 2026
- **Check-out:** May 12, 2026
- **Number of guests:** 2
- **Special requirements:** Couple of extra towels for his stay

Tips for Handling the Customer:

- **Address the Request:** He mentioned during the reservation process that he needs a couple of extra towels. Ensure the housekeeping staff is informed of this special requirement.

Is there anything else you need assistance with regarding Mr. Antonio's stay?

At the bottom, there is a text input field with the placeholder "Message Zia for key data insights." and icons for voice recording and sending.

Your check-in agent helps allot a room for Antonio's extended stay

The screenshot shows a chat window titled "Check-in Agent". A user message asks for a room recommendation for Mr. Antonio. The AI response, from Zia, provides a detailed recommendation for Room 308 (King Suite), including reasoning based on availability and suitability, and an actionable tip to maintain customer satisfaction.

Check-in Agent ▾

Mr. Antonio would like to extend his stay by a day. Which is the best room that we can allot to him?

Zia

Based on the current availability, the **best available room** for Mr. Olson is:
Room 308 (King Suite)
Reasoning for Suggestion:

- Availability:** Room 305 (his current room) is currently booked for another guest.
- Suitability:** Room 308 is also a **King Suite** located on the third floor, ensuring he maintains the same level of comfort and view he currently enjoys.

Actionable Tip:
Since the current room is not available, it is best to offer a similar room type rather than a downgrade, which helps maintain customer satisfaction during the change.

Message Zia for key data insights.

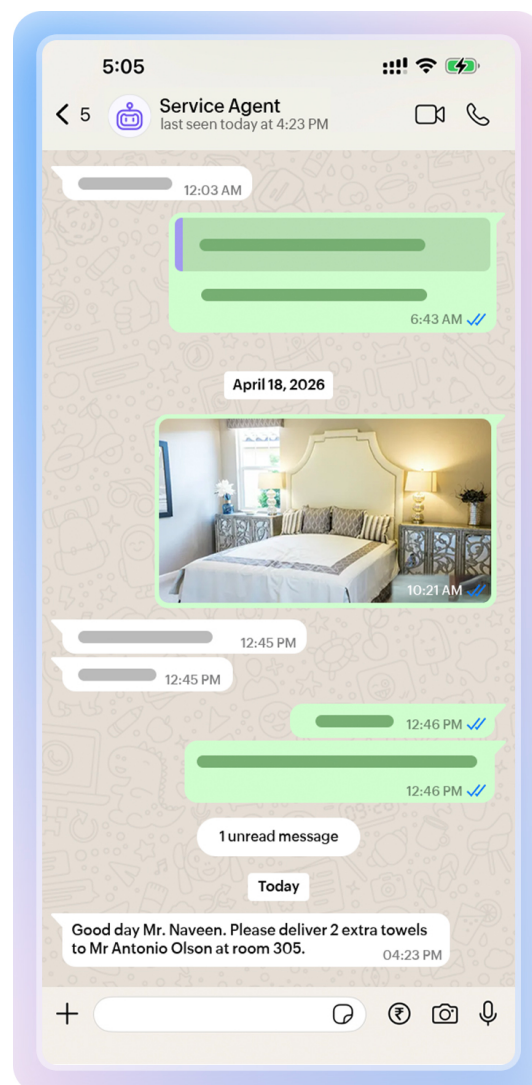
🎤 📄

The stay

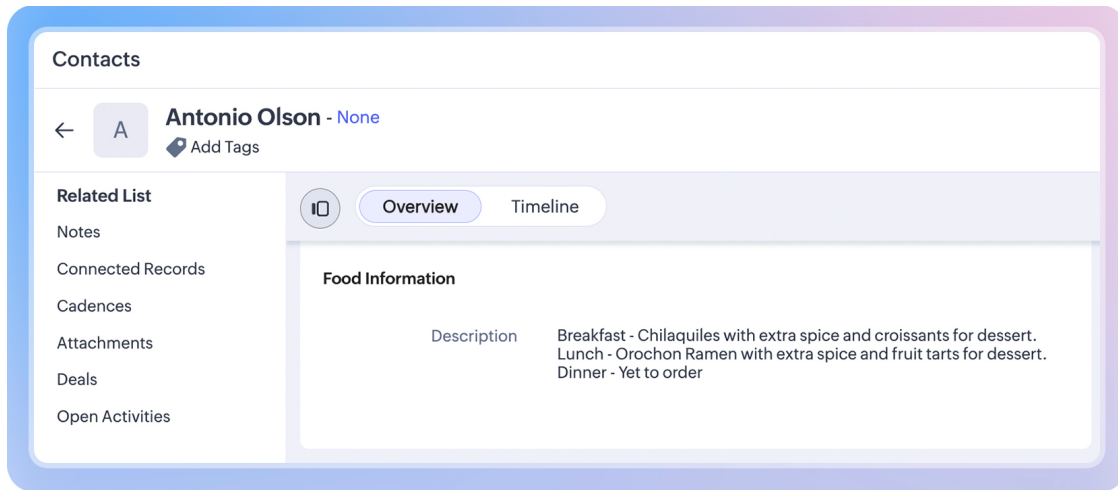
During their booking, the customer had mentioned the need for an additional pair of towels. The booking agent passes this information on to your service agent, which quickly notifies your staff of this fact so they can proactively send over the additional towels without the customer having to remind or follow up on this.

Also, the customer orders spicy food for their breakfast and lunch and includes desserts each time without fail. This order gets recorded in your CRM, and using this information, your service agent can suggest spicy dishes and desserts that the customers might enjoy for dinner. Every minor but attentive instance of service to your customers will go a long way in earning their trust and satisfaction.

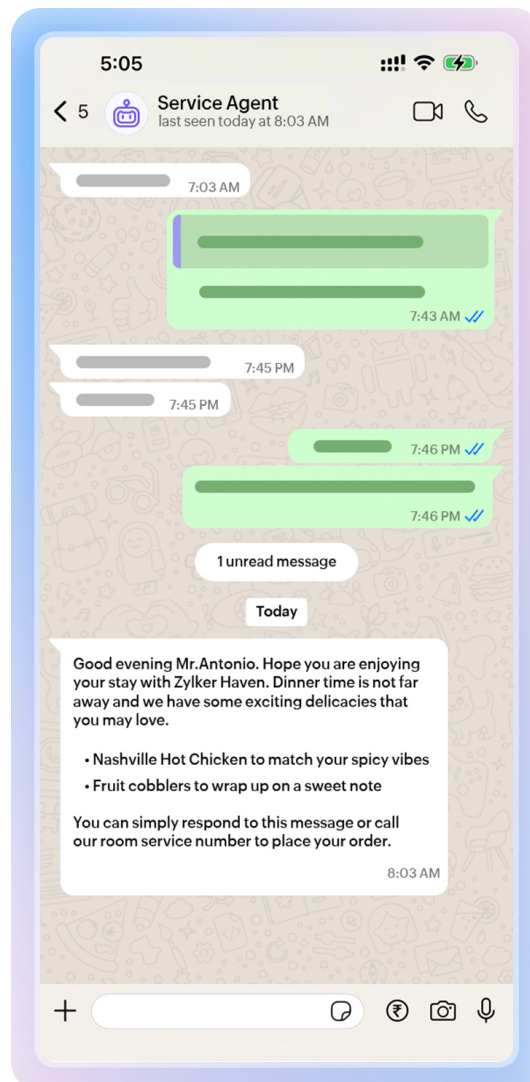
Your service agent notifies your staff to proactively deliver the extra towels to Antonio



Your service agent analyzes food orders by Antonio from Zoho CRM



Your service agent suggests dinner options to Antonio based on his food preferences



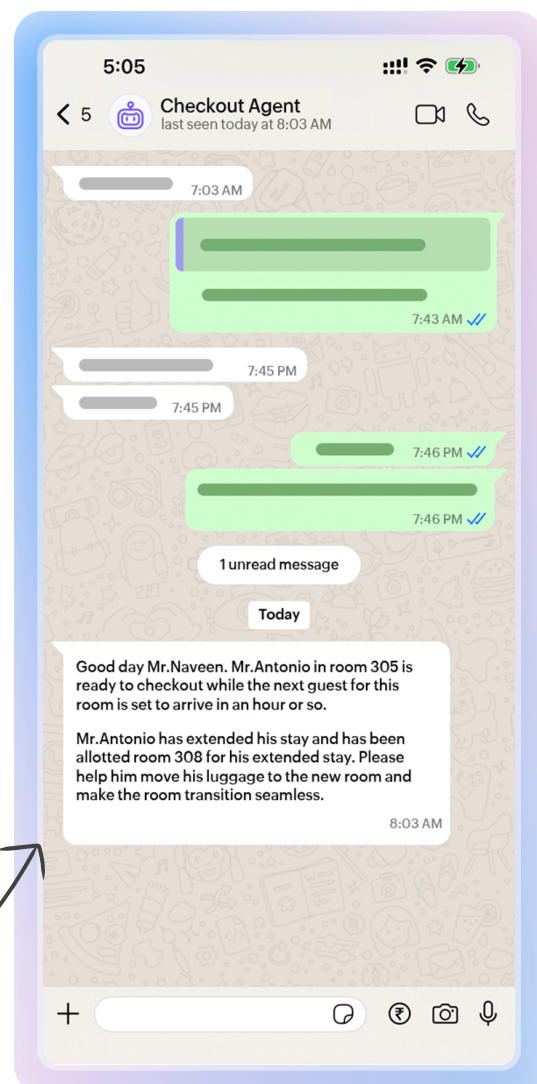
The departure

Your check-in agent promptly booked another room for the customer due to their last-minute request for an extended stay. It then notified your staff so they can make this transition as smooth as possible for the customer (by moving their luggage, etc.). This enables you to cater to your customers' needs with minimal waiting and ensures a smooth check-in experience for them.

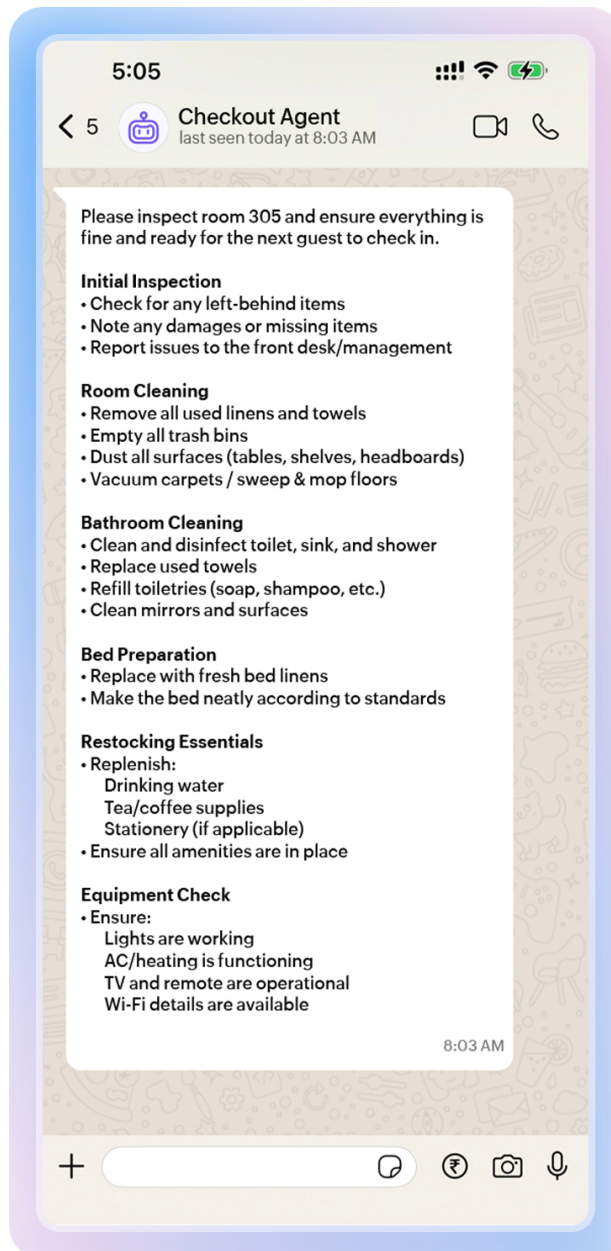
As the customer shifts to this new room, your checkout agent can prepare a checklist of tasks to complete in the room before the next guest arrives. Once done, your checkout agent notifies the check-in agent that this room is ready for the next guest—ensuring a seamless transition and preventing delays for incoming guests.

The evening before your customer's departure, your checkout agent can send a personalized message to the customer that confirms their checkout time, payment preferences, and any other needs to streamline the process. Upon learning that the customer has chosen an early morning checkout to catch a flight, your agent can offer helpful suggestions—such as airline-approved breakfast items and arranging a cab directly to the airport to eliminate the stress of finding transportation during early hours.

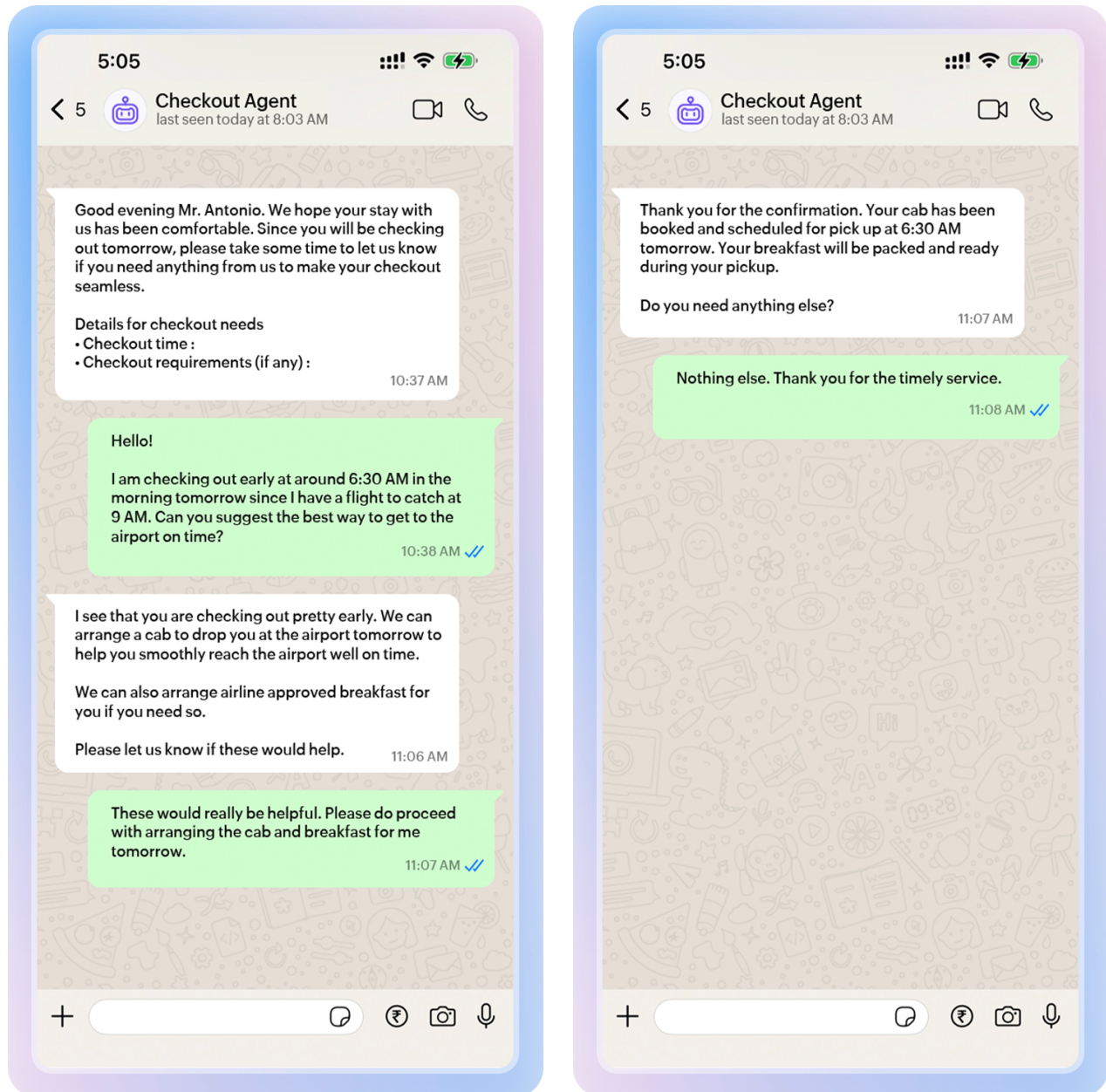
Your checkout agent notifies your staff about Antonio's room transition



Your checkout agent provides a detailed list of post-checkout inspections to get the room ready for the next guest



Your checkout agent reached out to Antonio to enquire about his checkout needs



The agents we've discussed in the example above are just a sneak peek into what agents can do for you. You can create the agents you feel are the most appropriate for your business and define their capabilities.

Productivity meets protection with Zia Agents

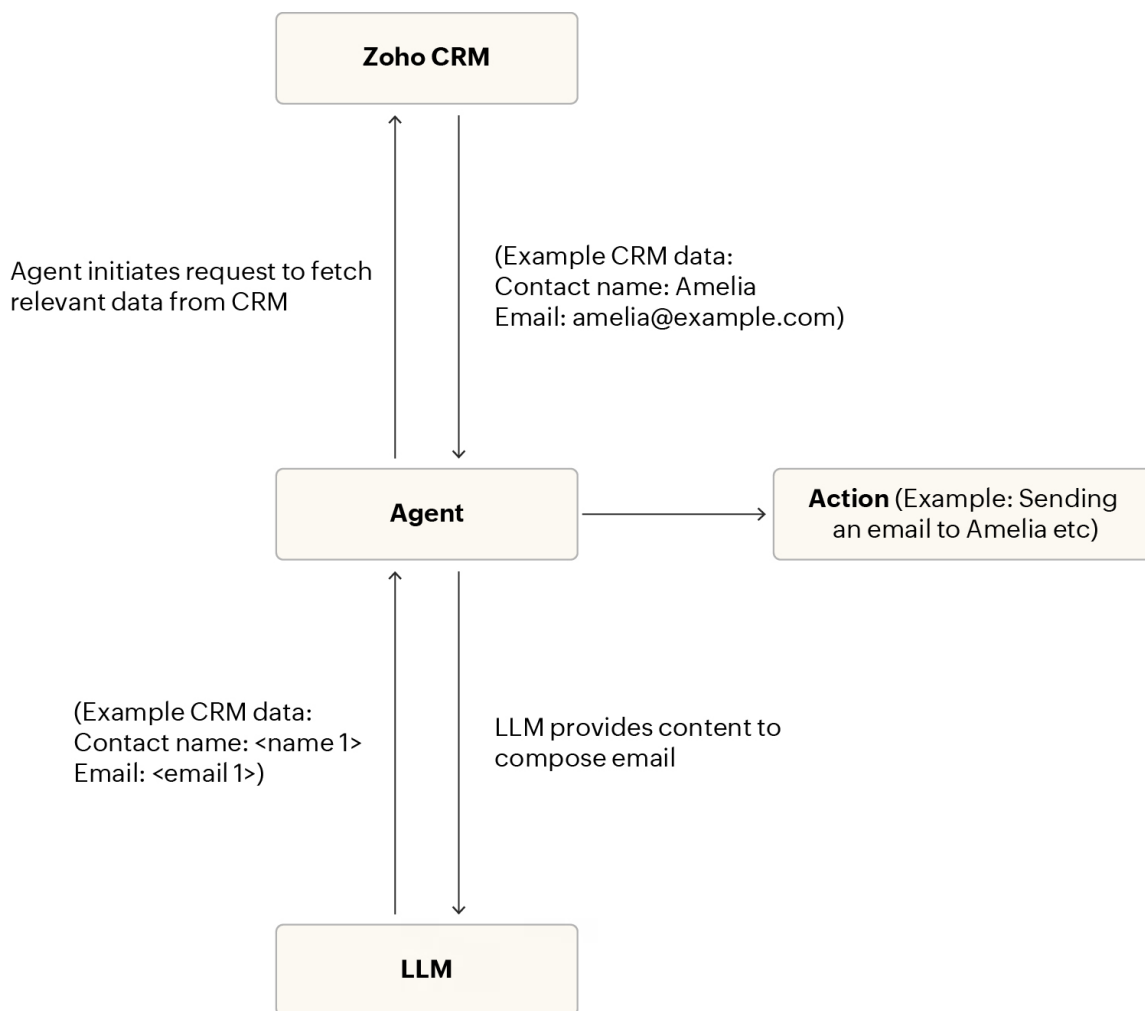
Privacy and security have always been among Zoho's highest priorities. We provide software that doesn't just enhance your business, but does so securely. The same extends to our agentic platform as well. Let's have a look at some of the security features in Zia Agents:

- PII masking
- Data access controls
- Guardrails

PII masking

Zia Agents hides personally identifiable information (PII), such as names, addresses, social security numbers, email addresses, and other sensitive data. This is a critical security measure to protect you and your customers' privacy and to comply with data protection regulations like GDPR, CCPA, and HIPAA.

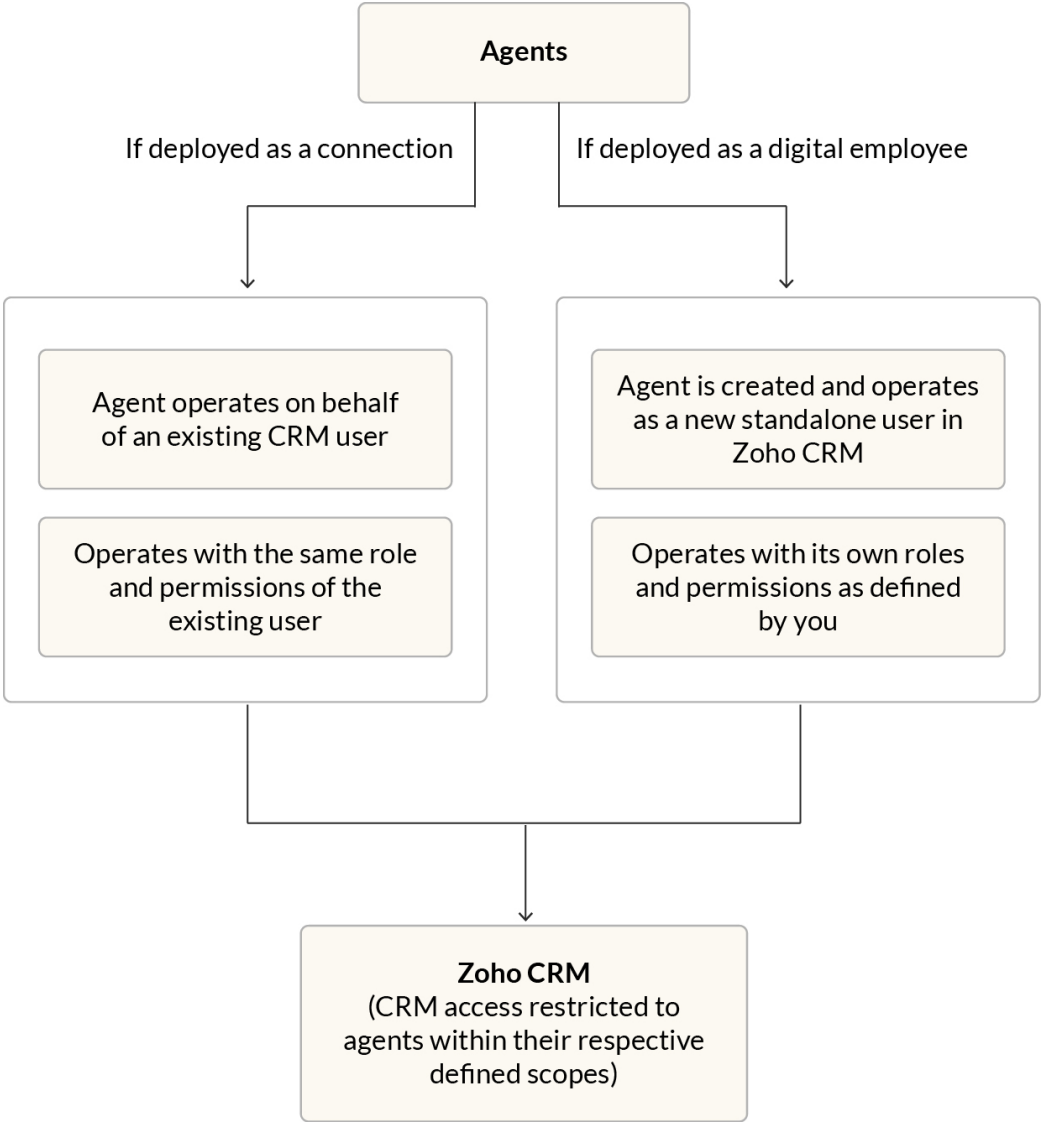
PII masking ensures that sensitive data isn't exposed during interactions or internal processing. For example, when data such as your lead or customer names are involved in your agentic transactions, Zia automatically masks such information with placeholders (e.g., "Amelia" becomes "<name 1>") before storing, analyzing, or sharing the data.



Data access controls

You can deploy Zia Agents in two modes: as connections (to existing users' profiles) or as standalone digital employees. The level of access an agent receives depends on the deployment method. If deployed via a connection, the agent operates under your existing role and privileges, executing actions as if they were performed by you.

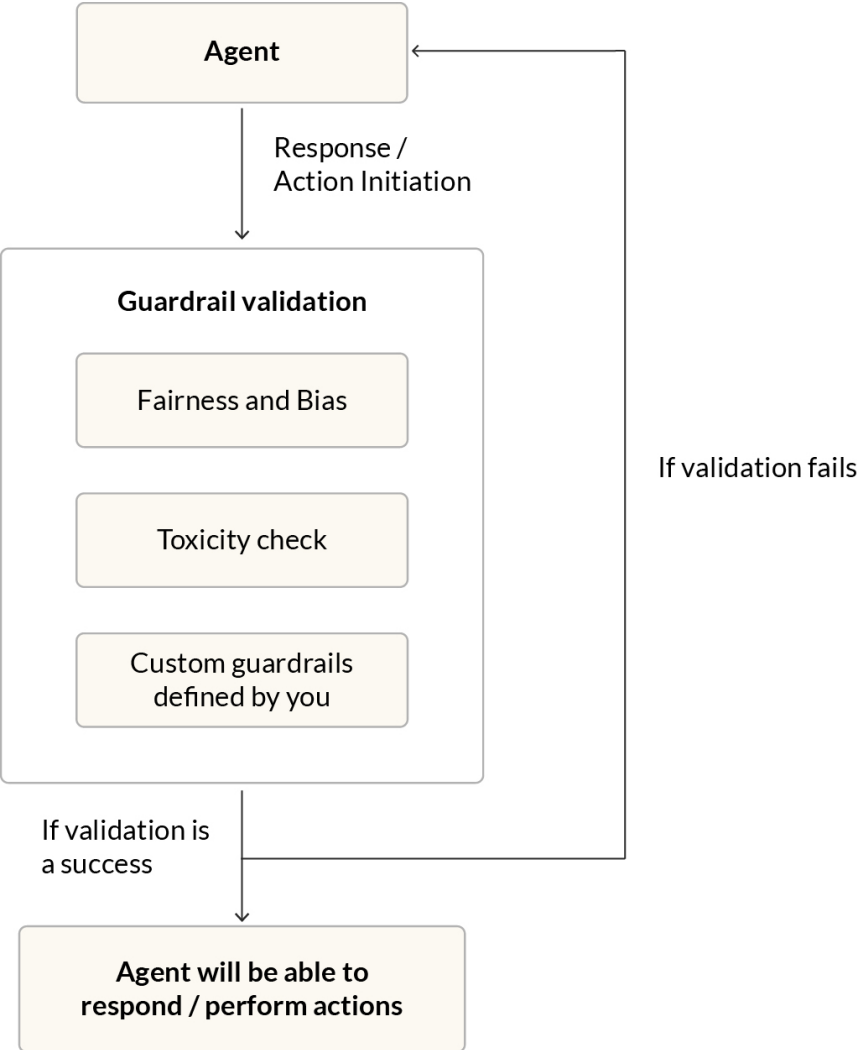
In contrast, when deployed as a digital employee, it becomes a standalone user in your CRM, operating under a distinct profile based on the role and permissions you assign. This allows you to set the precise scope of operations for your agents and maintain full oversight and control.



Guardrails

Zia Agents' guardrails are safety mechanisms that ensure your agents behave in the manner you've defined and don't compromise their own functioning or that of your CRM system. Think of them like boundaries that guide your agents' actions so it doesn't go off track. This way, Zia protects your agents from hallucinating irrelevant responses and performing invalid actions.

Humans naturally develop personal biases, and it's important to monitor and limit them to avoid negative outcomes. Agents can also develop biases and might end up providing toxic responses, based on what they've learned. In such cases, Zia comes with built-in safeguards to detect and mitigate these biases and toxicity, and ensure that agents respond fairly.



The journey has just begun...

The agentic era isn't just a technological shift; it's a transformation in how we think about work, productivity, and human-machine collaboration.

With Zia Agents, you can now build intelligent teams that operate seamlessly within their workflows—handling everything from customer inquiries and bookings to service reminders and checkout checklists. These agents don't replace human judgment or empathy; instead, they amplify it by freeing up valuable time and energy for humans to focus on strategic thinking, relationship-building, and innovation that might never have been possible before.

As we move forward, the future of work will be defined not by machines doing everything, but by humans and AI working in harmony—each bringing their own unique strengths to the table. The question is no longer whether we can adopt AI agents, but how we will use them to create smarter, more efficient, and more human-centered businesses.

Let's set sail for our agentic voyage ahead!

Resources

[Zia Agents - Help documentation](#)

Looking to recruit AI colleagues to bolster your workforce and business operations? Look no further than Zia Agents.

TRY ZIA AGENTS

