

Zoho Zia Agents Online Training for Business Users

OEM: Zoho Corporation • Code: ZOHO_ZIA_AGENTS_ONLINE_TRAINING_FOR_BUSI

COURSE DESCRIPTION

This program helps end users get the most out of Zia Agents deployed by their organization, and build simple agents themselves using Create with Zia AI. Note: this track does not cover Ask Zia, which is a separate Zoho product with its own training path. Sessions are delivered in English using practical examples from sales and support workflows. Use-case-driven and role-focused — designed to make participants productive with agents from day one. 1 day | 7–8 hours (inclusive of breaks)

AUDIENCE PROFILE

- Sales reps, SDRs, support agents, account managers, and operations users who interact with agents through Cliq, WhatsApp, ChatKit, or directly inside Zoho products. Also relevant for power users who want to build their own simple agents. No technical or admin background required.

PREREQUISITES

- This section doesn't contain any content.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- This section doesn't contain any content.

COURSE OUTLINE

Module 1: Day One (Part 1): Working with Agents

Understanding Zia Agents

- What Zia Agents are and what they can do for you
- The four agent types — what to expect from each
- Where you'll meet agents day to day: Cliq, WhatsApp, ChatKit, in-product

Discovering and Using Agents

- Browsing the Agent Store

- Pre-built agents for sales, support, marketing, operations
- Industry-specific pre-built agents
- Installing an agent for your team

Working Effectively with Agents

- Asking clear, useful questions
- Reviewing what an agent did before approving
- Knowing what an agent can't do (and when to take over)
- Read vs. write actions — what to double-check

Real-World Use Cases

- SDR and lead qualification
- Sales coaching and call review
- Support ticket triage and summarization
- Data enrichment and cleanup

Hands-on

- Installing and using a pre-built agent in Cliq

Module 2: Day One (Part 2): Building Your Own Simple Agent

Create with Zia AI

- Using the Home prompt bar and role shortcuts
- Describing what you want in plain language
- Reviewing what Zia generates before saving

Customizing Your Agent

- Refining the role and instructions
- Adding your own knowledge: files, URLs, WorkDrive
- Picking the right tool group (with admin help if needed)
- Light-touch guardrails

Testing and Improving

- Testing your agent before sharing
- Reading the response and making adjustments
- Reviewing session history
- When to tune vs. switch to a different agent

Hands-on

- Building an agent from scratch for a real workflow you bring to class
- Testing it end-to-end