



CERTIFIED ZOHO PARTNER



# ONE SINGLE PLATFORM

## FOR ALL YOUR OPERATIONS

**Modular ERP for SMEs & Nonprofits**



*Schedule your discovery meeting*



**Let's Innovate Together  
with the Power of ZOHO  
to Transform Your  
Organization**

## WHO ARE WE?

### OUR MISSION

As a Zoho partner, Lumio Intelligence transforms the processes of SMEs, nonprofits, and NGOs into integrated, high-performing, and easy-to-use system, combining performance, automation, and everyday simplicity. We are present in Canada, France and Switzerland.



### Our Approach: Build, Automate, and Grow — Together

At Lumio Intelligence, every project starts with a simple belief: technology should empower, not complicate.

That's why we've designed a three-step approach focused on real impact in your daily operations.

#### **Understand to Transform**

We analyze your current processes, tools, and challenges. Through a targeted audit, we identify friction points and opportunities to optimize your operations.

#### **Design a Fluid and Intelligent System**

We build a customized Zoho architecture: connected, automated, and scalable. CRM, campaigns, operations, finance, or HR, all working together in one unified environment.

#### **Empower Your Teams to Be Autonomous**

We don't just deliver a system. We train, support, and coach your teams so every member can master the tools, track key indicators, and contribute to overall performance.

#### Our Values



**Respect & Human Relations**



**Responsibility & Trust**



**Collaborative Ingenuity**



**29+**  
Years in  
Business

**18K+**  
Employees

**150+**  
Countries  
Served

**16**  
Data Centers

**120M+**  
Users

**55+**  
Applications

## 100% Zoho Guidance, 100% Human Approach

Whether you're a growing SME, a nonprofit, an established NGO, or a team seeking more agility, we adapt Zoho tools to your processes, not the other way around.

We stand by your side at every stage: analysis of functionalities, configuration, development, training, and future evolutions.

## Business Expertise Beyond Technology

Our experts combine technological mastery with a deep understanding of real-world operations:

- Optimization of sales & automated pipelines
- Inventory & after-sales service management
- On-site scheduling & logistics
- Automated marketing & targeted campaigns
- Event, member, donor, or subscription management
- Development of custom Zoho applications (Deluge, Creator)
- Complete systems for retail, services, and distribution
- Solutions tailored to nonprofits, NGOs, and cooperatives



Lumio Intelligence deploys the best Zoho applications to automate, connect, and structure your operations.

We also integrate Zoho with your existing tools.

### CRM & Sales

Zoho CRM, Bigin, Desk, SalesIQ

→ Customer tracking, sales automation, after-sales service

### Marketing & Communication

Campaigns, Marketing Automation, Social, Forms & Survey

→ Targeted campaigns, automated customer journeys, data collection

### Projects & Services

Projects, FSM, Booking, Flow

→ Planning, field operations, inter-application automations

### Finance & Logistics

Books, Inventory, Subscriptions, Commerce

→ Invoicing, inventory management, subscriptions, e-commerce

### Analytics, Personalization & Development

Analytics, Creator, Deluge

→ Reports, dashboards, custom business applications

### HR & Recruitment

People, Shift, Recruit

→ HR management, recruitment, timesheet tracking

# THE ESSENCE OF ZOHO

Zoho dares to bring together everything an organization needs to manage, collaborate, sell, communicate, analyze, and innovate, all within a single ecosystem.

Every Zoho application is designed to work in harmony with the others, enabling you to centralize your processes, automate tasks, and gain a global view of your business.

Whether it's customer relationship management, marketing, operations, finance, HR, collaboration, or productivity, Zoho simplifies digital complexity.

With over 60 seamlessly integrated applications, it's the promise of smooth, agile, and scalable management: a platform that adapts to your business, your pace, and your ambitions.

**28**

years

**18K+**

employees

**75+**

Apps

**150+**

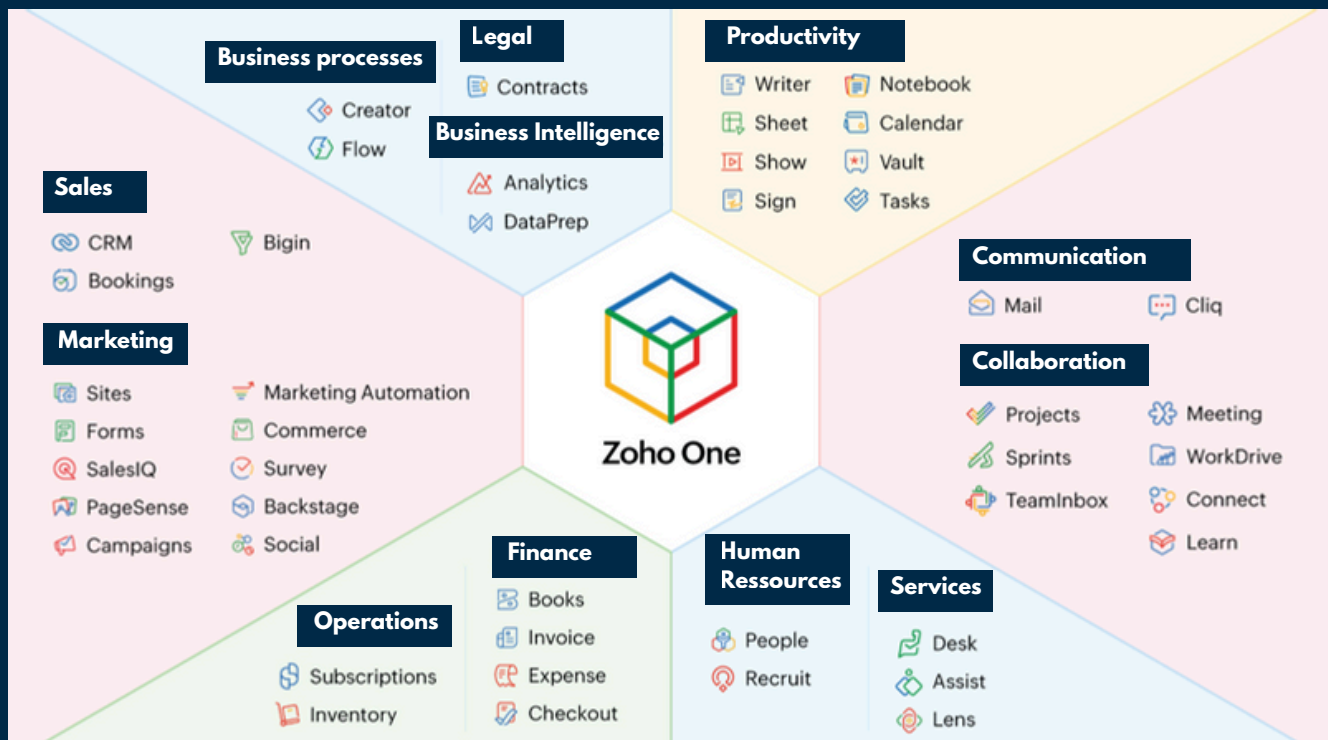
Countries

**100+**

Million  
Users

**700K+**

Customers



### A Complete, Integrated Ecosystem

Zoho is much more than just a CRM. It's a full suite of over 60 applications designed to cover every need: sales, marketing, finance, human resources, project management, automation, data analysis, and more.

All applications communicate natively with each other, enabling you to centralize information, avoid duplicates, and streamline daily collaboration.

### A User Experience Designed for Agility

Zoho's interface is modern, intuitive, and easily customizable.

Each user can adapt their views, processes, and automations to their specific needs, no coding required.

This flexibility ensures quick adoption by teams and guarantees that technology adapts to your organization, not the other way around.

### Automation Serving Performance

With Zoho, repetitive tasks and complex processes become simple.

Automate follow-ups, reminders, lead management, sales and marketing synchronization, everything can be orchestrated through intelligent workflows.

The result? Greater efficiency, fewer errors, and more time to focus on value-added work.

### A Scalable Platform, Accessible to All Organizations

Whether you're an SME, nonprofit, institution, or large enterprise, Zoho adapts.

The subscription is modular, applications can be activated as you grow, and the platform evolves continuously.

This scalability lets every organization build a management system at its own pace, perfectly aligned with its ambitions.

# 4 REASONS TO CHOOSE





### SECURITY

Secured like a bank.  
Military-grade encryption,  
ultra-protected data centers,  
nothing is left to chance.



### OWNERSHIP

Your data stays yours.  
At Zoho, no exploitation or  
resale: your information,  
your power.



### CONFIDENTIALITY

You control, Zoho executes.  
Access, export, deletion:  
you're always in charge.



### COMPLIANCE

Certified, audited,  
guaranteed.  
International and  
European standards,  
independent audits: trust,  
proven.



### HOSTING

Here and nowhere else.  
Your data never leaves  
your territory, unless you  
require it.



### RESPONSABILITY

Shared roles, global security.  
Zoho secures the infrastructure,  
you control access: shared  
efficiency.

**WITH ZOHO,  
YOUR DATA IS  
SECURED,  
HOSTED AND  
PROTECTED**



# GREATER MONTREAL HOTEL ASSOCIATION (AHGM)



Nonprofit Organization



[www.ahgm.org](http://www.ahgm.org)

## Case Study

### CONTEXT



Before our intervention, AHGM was using an underutilized Zoho CRM, not fully adapted to their real needs, and a team not fully trained on digital tools.

The challenge: modernize member relationship management, automate renewals, and provide a benchmark digital experience to the entire Montreal hotel community.

### KEY FIGURES

This transformation enabled AHGM to bring together its entire hotel community around a centralized digital space, and to strengthen management thanks to expert support, from initial diagnosis to on-the-ground training.

**+100**

Hotel Members

**+450H**

deployed on the project

### CHALLENGES



Like many associations, AHGM had an underused CRM and a team lacking training, which limited growth, personalization, and effective member follow-up.

The key: turn digital constraints into a real facilitator, to deliver more value without adding daily complexity.

### SOLUTIONS



- Complete reconfiguration of the CRM: centralized management of hotel members, automated renewal process, advanced status management, and personalized alerts
- Deployment of a member platform: secure access for each member, a resource library, and real-time sectoral statistics dashboard
- New responsive website, connected in real time to both the CRM and member platform
- Implementation of dynamic forms for strategic data collection
- Integration of Zoho Analytics: automatic generation of sector reports, direct publication on the member platform

### BENEFITS



- Time savings and reduced manual tasks
- 360° visibility on members and the sector
- Higher quality data, actionable and precise reporting
- Enhanced member experience
- Strengthened AHGM digital leadership among local hoteliers



I have been working with Lumio for over two years and am constantly impressed by the quality of their service. Their client team is particularly attentive and personalized, always available to respond to the specific needs of each client. The team's competence and professionalism are undeniable, making every interaction pleasant and efficient.

**Daniel Larose | Propage Communication**

What we especially appreciated was their fully personalized approach. Lumio took the time to really understand our specific needs, which allowed for a tailor-made implementation, perfectly suited to our expectations. Their attentive support and responsiveness throughout the project greatly facilitated the transition.

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## **NOW IT'S YOUR TURN TO TRANSFORM YOUR ORGANIZATION WITH ZOHIO AND THE GUIDANCE OF LUMIO INTELLIGENCE**



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