ZOHO CRM PLUS
FOR IT COMPANY

CLIENT PROFILE

The client is a global SAP and UIpath partner, Providing IT Services headquartered in London. In 2018, the client expanded their market reach by opening offices in Mumbai and Pune. Client serves global brands across the UK, US, France, India, and the Middle East. The client is uniquely positioned to improve customer experience through the agile and time-bound implementation of SAP cloud ERP, intelligent Automation, and advanced Analytics.

CURRENT LANDSCAPE

As the client business grows organically, the client was not using any tool other than Microsoft Excel to manage lead distribution among team members and track the status of the same.

1. Inefficient Lead Management

The client was facing a problem with manual lead capture from different lead sources like websites, and social media platforms and tracking and assignment processes led to missed opportunities because of a lack of automated sales follow-ups to book meetings etc which resulted in longer response times, and lower conversion rates.

2. Sales Pipeline Management

Without effective Sales Pipeline management, clients face problems in sales activities from approaching leads to closing a deal which leads to a lower conversion rate and inaccurate sales forecast.

3. Manual Signing Process

The client's reliance on manual processes for contract signing was slowing down the sales cycle.

4. Limited Customer Engagement

Without real-time visitor tracking and proactive chat capabilities, the client finds it challenging to engage website visitors effectively, resulting in missed sales opportunities and lower customer satisfaction.

5. Ineffective Social Media Platforms:-

The client lacks a cohesive strategy for managing their social media channels, resulting in inconsistent branding, low engagement rates, and missed opportunities to connect with their target audience.

6. Reporting and Dashboards:-

Due to a lack of data points at each stage of the lead and sales cycle, there was no real-time reporting and dashboard to monitor the health of the business.

PROJECT SCOPE

Our client focuses on leveraging technology to enhance business processes. At a high level following scope of work is defined.

01 They want to integrate their website with CRM and visitor tracking systems while ensuring seamless integration with popular social media platforms and Single Sign-On (SSO) capabilities with Microsoft services.

02 We implemented Zoho CRM for our client for lead and sales cycle management.

03 We Implemented Zoho e-Sign for e-Signing of Contract

04

05 Implement Zoho Social for social media

Integrate the website with Zoho CRM to automatically capture leads directly in the Zoho CRM Lead module

06 Automation for Follow-up, task tracking, notifications (internal/external), Messaging (WhatsApp/sms/calling) etc

07 Zoho Project integration with Zoho CRM to automatically create Project on Deal closed won.

08 Timesheets management for automatic billing through Zoho books accounting software.

09 Zoho Campaign for Marketing bulk and drip Email/sms campaigns

10 Zoho Desk for managing customer-related queries and solving them in SLA driven approach.

Software Tools Proposed

Survey

Zoho Projects

Zoho Analytics

Zoho SalesIQ

Zoho Campaigns

Zoho CRM

Zoho CRM Plus

Zoho Social

Industry we served

Information Technology

Region

London

Solution Proposed

1. Website Integration with Zoho CRM

Our team implemented Zoho CRM to suit the intricate lead management processes of our client, an IT SAP-based company. By closely analyzing their unique business workflows, through seamless integration with their website forms, we enabled automatic lead capture, ensuring that no potential opportunity slipped through the cracks. We implemented the Welcome email process flow along with initial consultation meeting booking (sales funnel) and then automation in terms of follow-up reminders through email, sms and WhatsApp & IVR to maximise conversion.

2. Website Integration with Zoho SalesIQ

With the deployment of Zoho SalesIQ, we equipped our client with powerful real-time website visitor tracking and proactive chat capabilities. By integrating SalesIQ into their website, we enabled our clients to monitor visitor behaviour in real-time and engage potential leads through proactive chat, gaining valuable insights into their browsing patterns and preferences.

3. Social Media Integration with Zoho Social

With the implementation of Zoho Social, we provided our client with a centralized platform for managing their social media interactions across multiple channels, including Instagram, LinkedIn, Facebook, and YouTube. With the help of this integration they effectively monitor social media performance, identify trends, and engage with their audience in meaningful ways.

4. Zoho Campaign and Zoho Survey

The implementation of the Zoho Campaign and Zoho Survey empowered our client to execute targeted email marketing campaigns and gather valuable customer feedback. With Zoho Survey, our client could design and deploy surveys to collect insightful feedback at various touchpoints in the customer journey.

5. SSO Integration with Microsoft with Zoho

To simplify employee access and enhance security, we implemented Single Sign-On (SSO) integration between Microsoft services and Zoho applications. This seamless integration allowed employees to access Zoho CRM, SalesIQ, Social, Campaign, Survey, Desk, and Analytics using their existing Microsoft credentials, improving productivity and user experience.

6. Zoho Sign Integration With Zoho CRM

With this integration, the client can send documents required for signing to any contact stored in their CRM directly from the application. This integration helps clients merge mail to Zoho CRM and inventory templates where they can use CRM data to send customized documents.

7. Zoho Projects integration with Zoho CRM

The integration of Zoho Projects with Zoho CRM helps our client automatically create new projects when a deal is marked as "Closed Won" in CRM. This integration saves time, automates their workflow and tracks each code version as a milestone. This approach has resulted in improving team productivity and ensuring tracking from deal closure to project initiation.
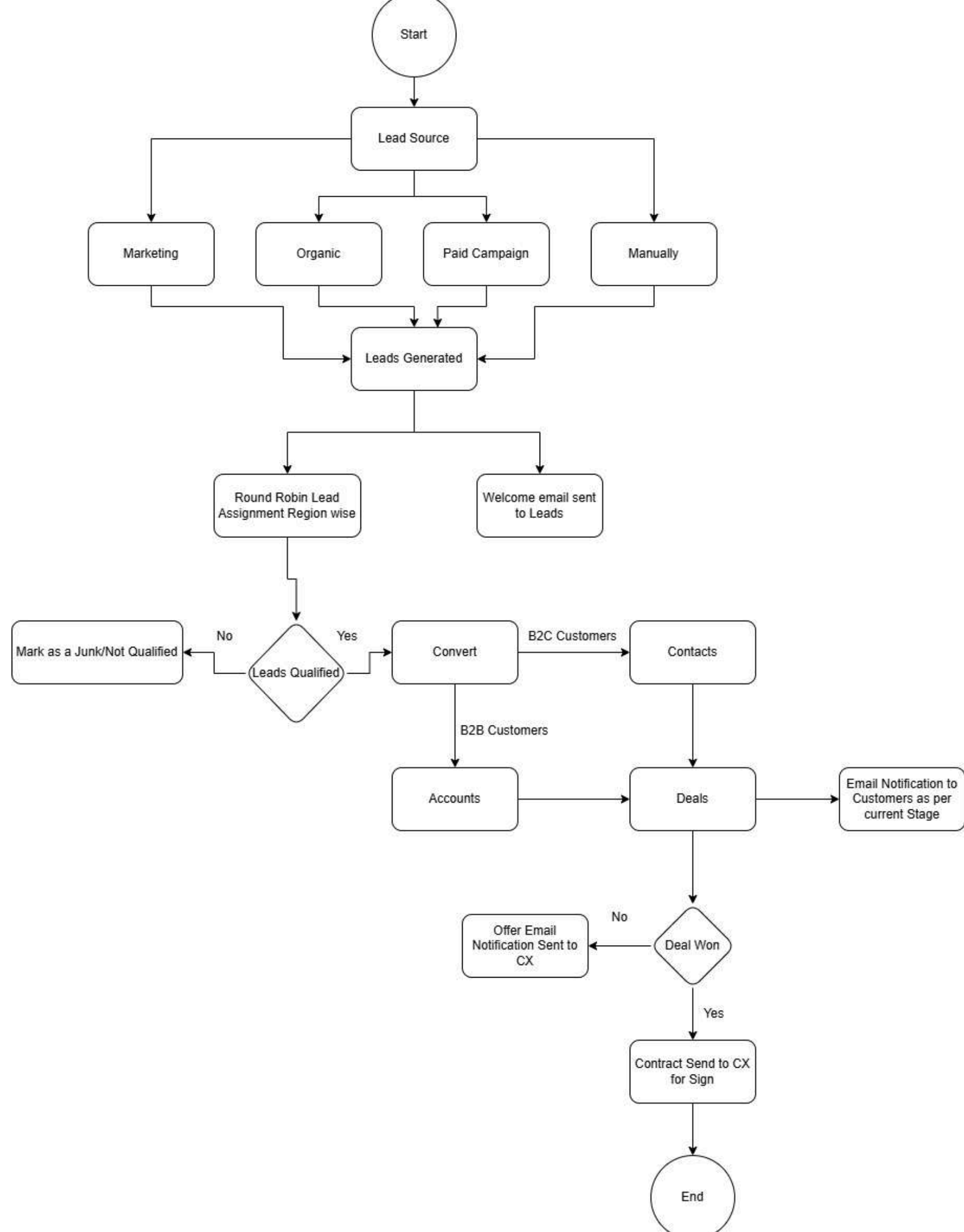
Work Flow Diagram

Results

Improved Lead Management Efficiency

Integrating Zoho CRM with the client's website significantly improved lead management efficiency. Automatic lead capture from website forms ensured no potential opportunity was missed. As a result, the client experienced reduced lead response times and improved conversion rates, ultimately driving revenue growth.
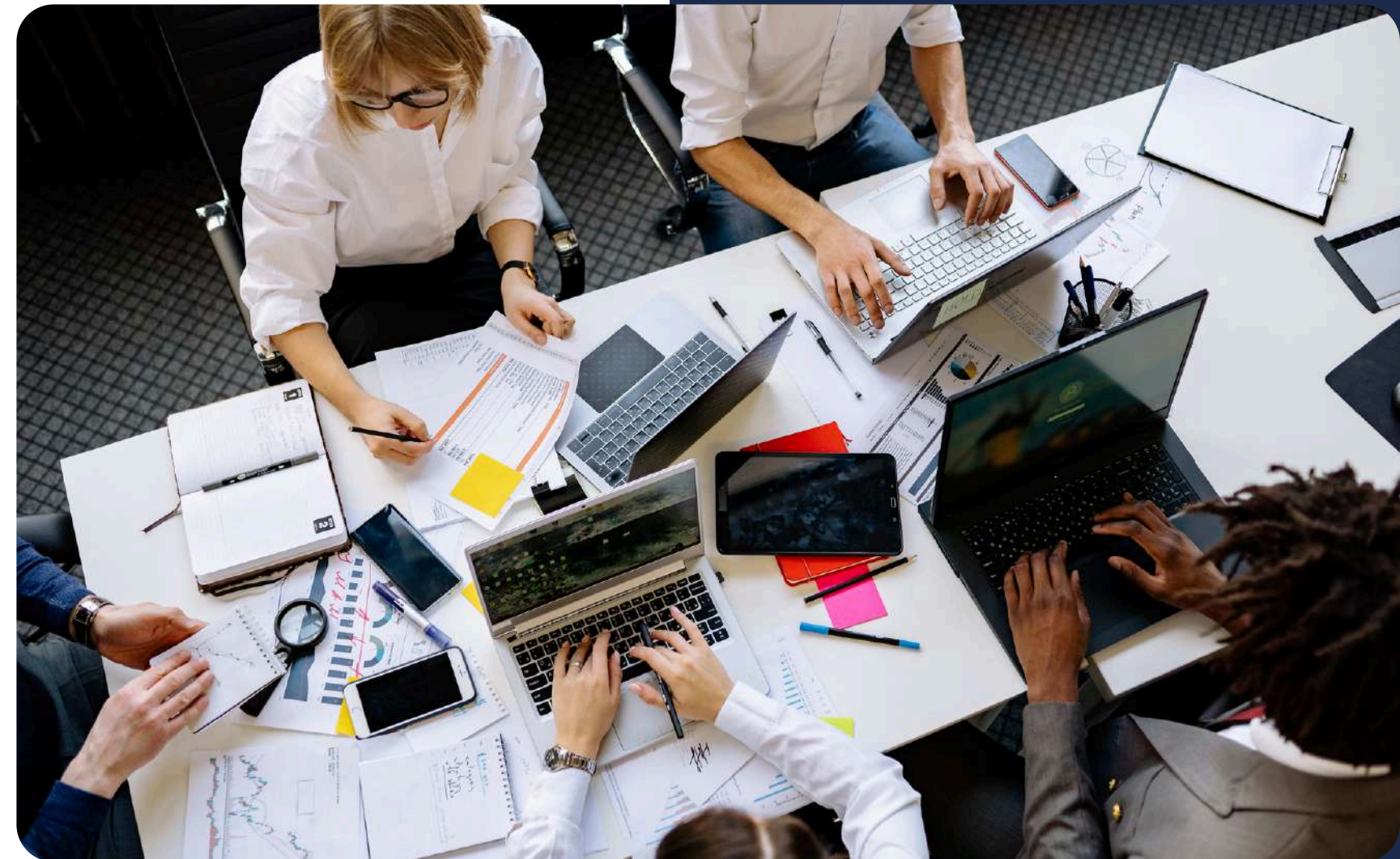
Enhanced Customer Engagement

The implementation of Zoho SalesIQ helps the client to engage with website visitors and provide timely assistance, the client was able to deliver personalized support and guidance, resulting in higher levels of customer satisfaction and loyalty.

Increased Social Media Impact

Integrating Zoho Social with the client's social media channels creates brand presence and engagement across platforms. By managing paid campaigns effectively the client achieved greater engagement which led to increased brand visibility and lead generation through social media platforms.

Faster Document Processing

The integration of Zoho Sign with Zoho CRM enables faster contract signing and simplifies the way they sign business documents also it automates the e-signature collection, improves turnaround time and closes deals much faster.

98% Improvement in Lead Management

95% Improved Customer Engagement

90% Improvement in Social Media Management

90% Faster Document Processing

CRM MASTERS

We are a CRM consultant company, Known as the Zoho Premium Partner. With over 8 years of experience and more than 2000+ successful projects, we have a proven track record of helping businesses optimize their workflows and boost growth. Our team of 75+ expert developers specialize in delivering top-notch CRM integrations, and tailored business solutions to meet our client's needs. If you've faced challenges with a non-responsive CRM system, CRM Masters will customize it to meet your specific needs, ensuring sales and revenue growth.

LOOKING FORWARD TO WORKING WITH YOU!

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