

Zoho CRM Implementation For Renewable Energy Company

CLIENT PROFILE

They are India's Premier renewable energy, founded in 2014, boasting exceptional solar and wind technology capabilities. They have emerged as a prominent player in the renewable energy industry. They enable businesses across India to embrace clean energy with ease and confidence through long-term Power Purchase Agreements.



10+ YEARS OF
EXPERIENCE

 NEW DELHI, INDIA



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.



Challenges Faced by Our Client



INEFFICIENT LEAD MANAGEMENT

To ensure that they are not missing any recurring leads, they require assistance with implementing a lead management system that can be used to compare leads every month.



REGION-WISE SALES TRACKING

They faced challenges tracking and managing sales across different regions. Before implementing Zoho CRM, they need a centralized system for monitoring and analyzing regional sales performance. It impacts the ability to make informed decisions regarding resource allocation, marketing strategies, and customer targeting.

BETTER REPORT AND DASHBOARD

They lacked real-time reporting capabilities and no centralised dashboard for monitoring key performance indicators. It became more work for management to gain insights into the company's overall performance and make data-driven decisions.



WORKFLOW AUTOMATION

The absence of workflow automation affects their daily operations, such as subsequent email communications or lead assignments to sales representatives that were previously completed manually. It wastes valuable time and increases the likelihood of errors and inconsistencies in client interactions.

DATA FILTRATION

To effectively execute marketing campaigns and engage customers in a personalised manner, organisations must be able to filter and segment customer and lead information effectively. With the ability to do so, marketing efforts were effective and likely to produce the desired outcomes.



MANUAL WORK

The reliance on manual processes was a common theme in this company's operations. Many tasks were prone to human error, from data entry to lead follow-up to performance tracking. This manual approach not only hindered efficiency but also limited the scalability of their business.

Project Background

Our client works manually for their business, so they face problems in lead management and sales tracking that impact their business growth. We implemented Zoho CRM for them. As a company committed to sustainable energy solutions, it sought to streamline its business operations, enhance customer relationship management, and optimise its sales processes.



Client need helps with



Data Filtration



Lead Management



Centralised Dashboard



Zoho CRM



GURGAON, INDIA

Technology we used

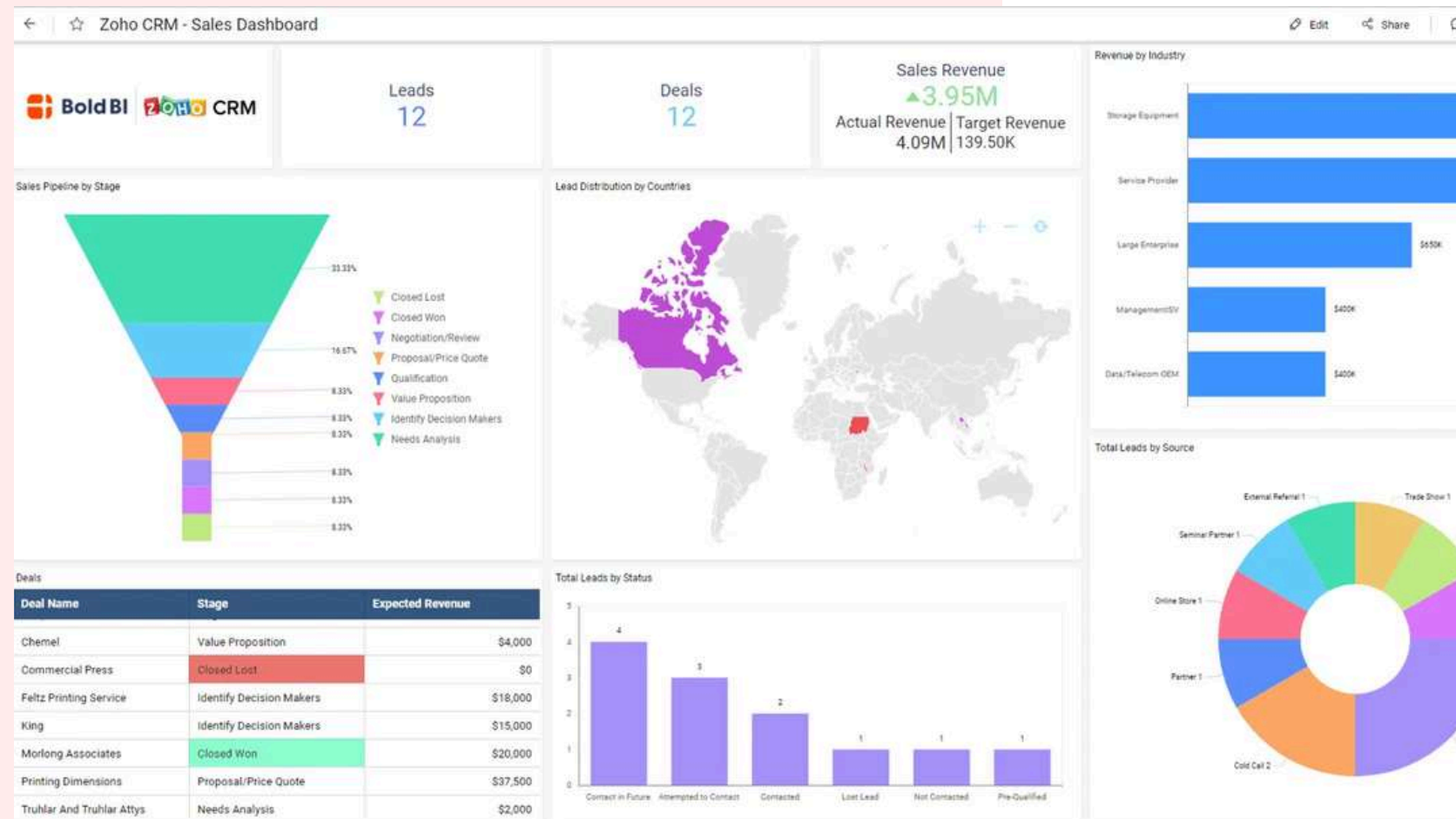
Region

Industry We Served

Solar Energy

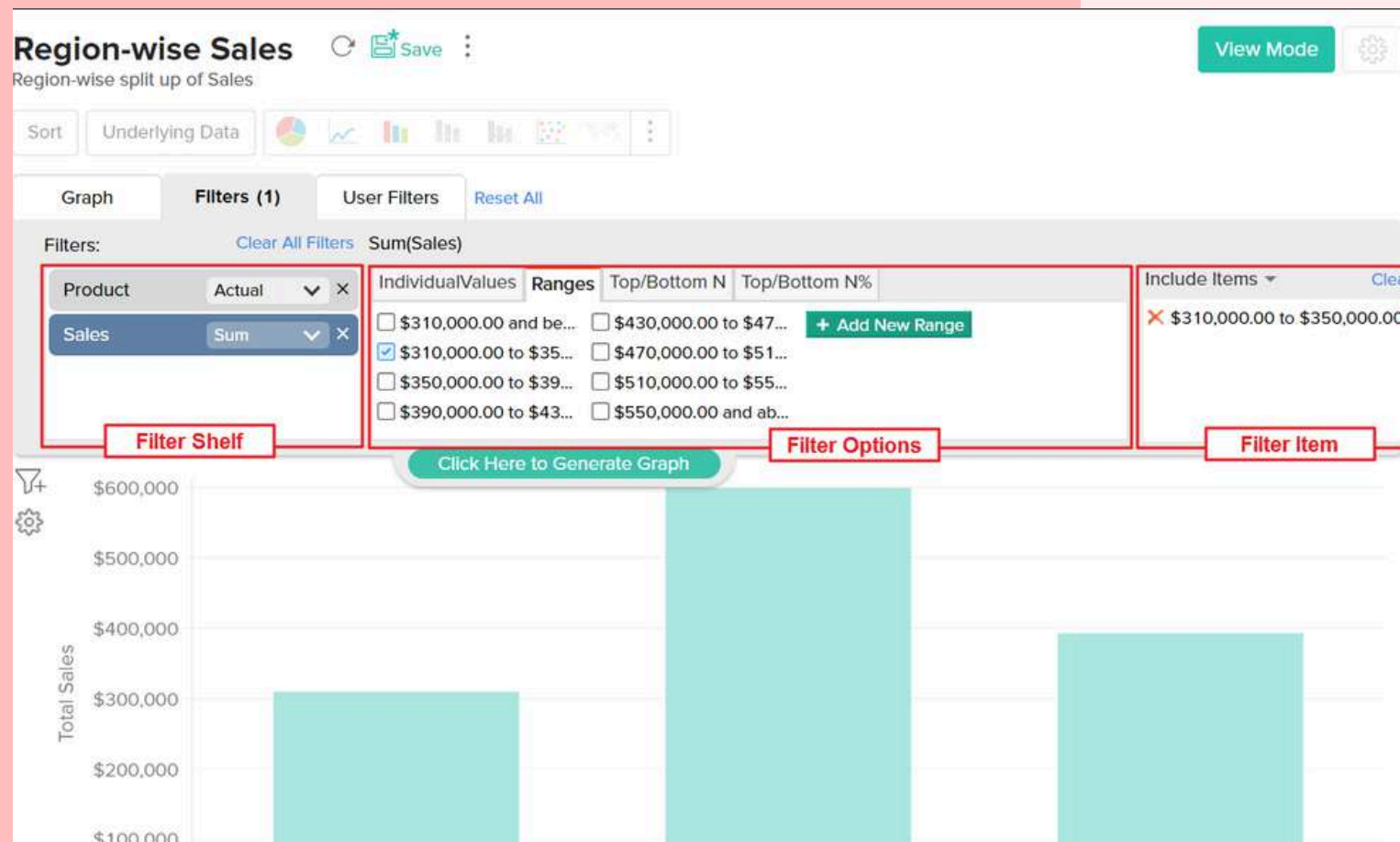


Solution Proposed



Zoho CRM

Implementation of Zoho CRM facilitated a unified view of customer data and empowered sales and marketing to manage leads efficiently and provide a personalized experience.



Better Data Filtration

With the implementation of Zoho CRM in their company, their data filtration process and customer and lead information segmenting are improved effectively.

Improve Lead Conversion Rates

After implementing Zoho CRM, the company experienced an increase in lead conversion rates due to better lead management and follow-up automation.

Feeds My Jobs Leads Accounts Contacts Deals Activities Dashboards

Modules Tab Groups Web Tabs

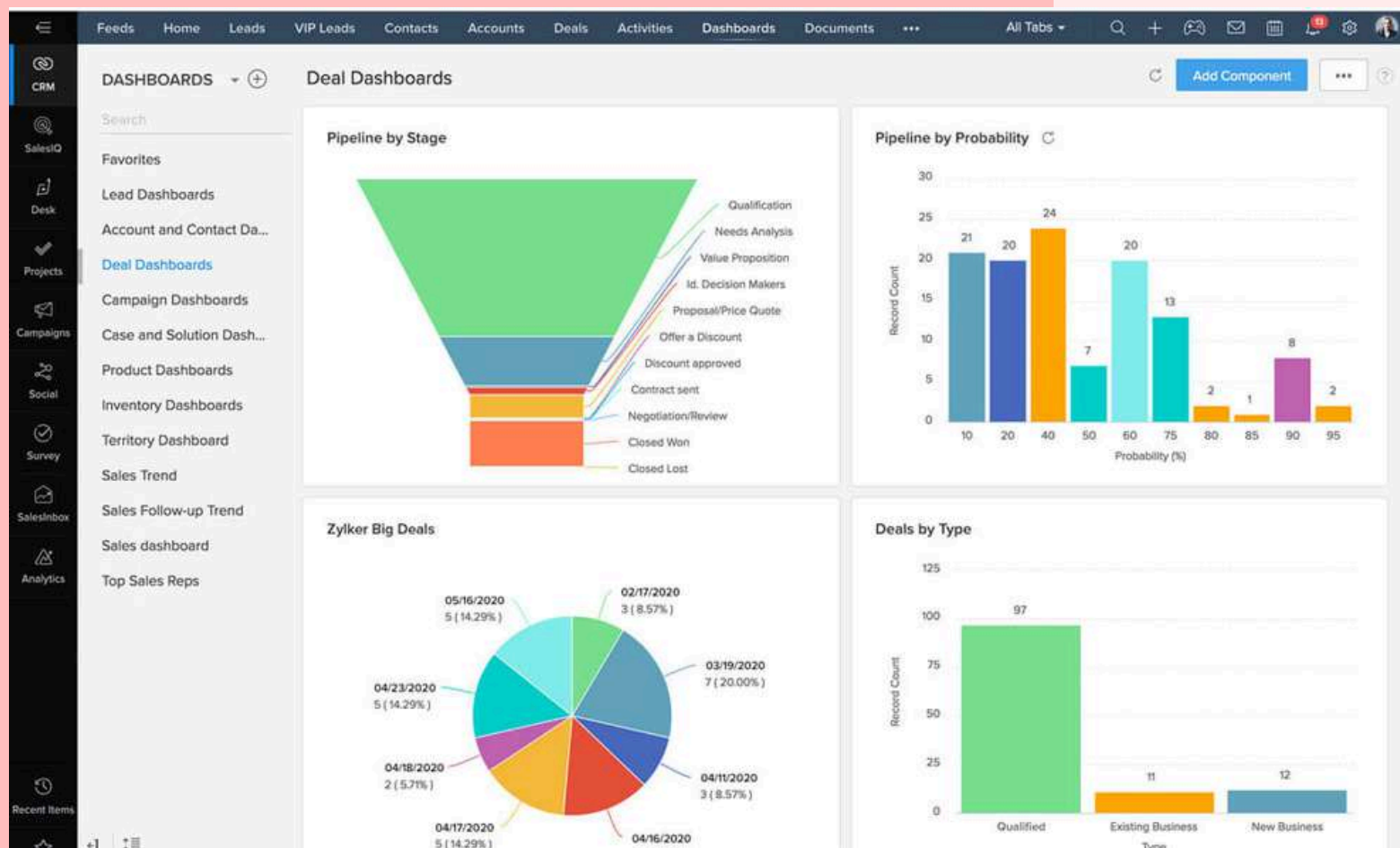
List of Modules

+ Create New Module Organize Modules

DISPLAYED IN TABS AS	MODULE NAME	SHARED TO	LAST MODIFIED
My Jobs	Approvals	All Profiles	
Leads	Leads	10 Profiles	January 24, 2017
Accounts	Accounts	All Profiles	December 11, 2016
Leads	Accounts	All Profiles	January 30, 2017
Leads	Potentials	8 Profiles	February 22, 2017
Activities	Activities	All Profiles	
Tasks	Tasks	All Profiles	
Events	Events	All Profiles	
Calls	Calls	All Profiles	

Lead Conversion Mapping

Here is your Smart Chat (Ctrl + Space)

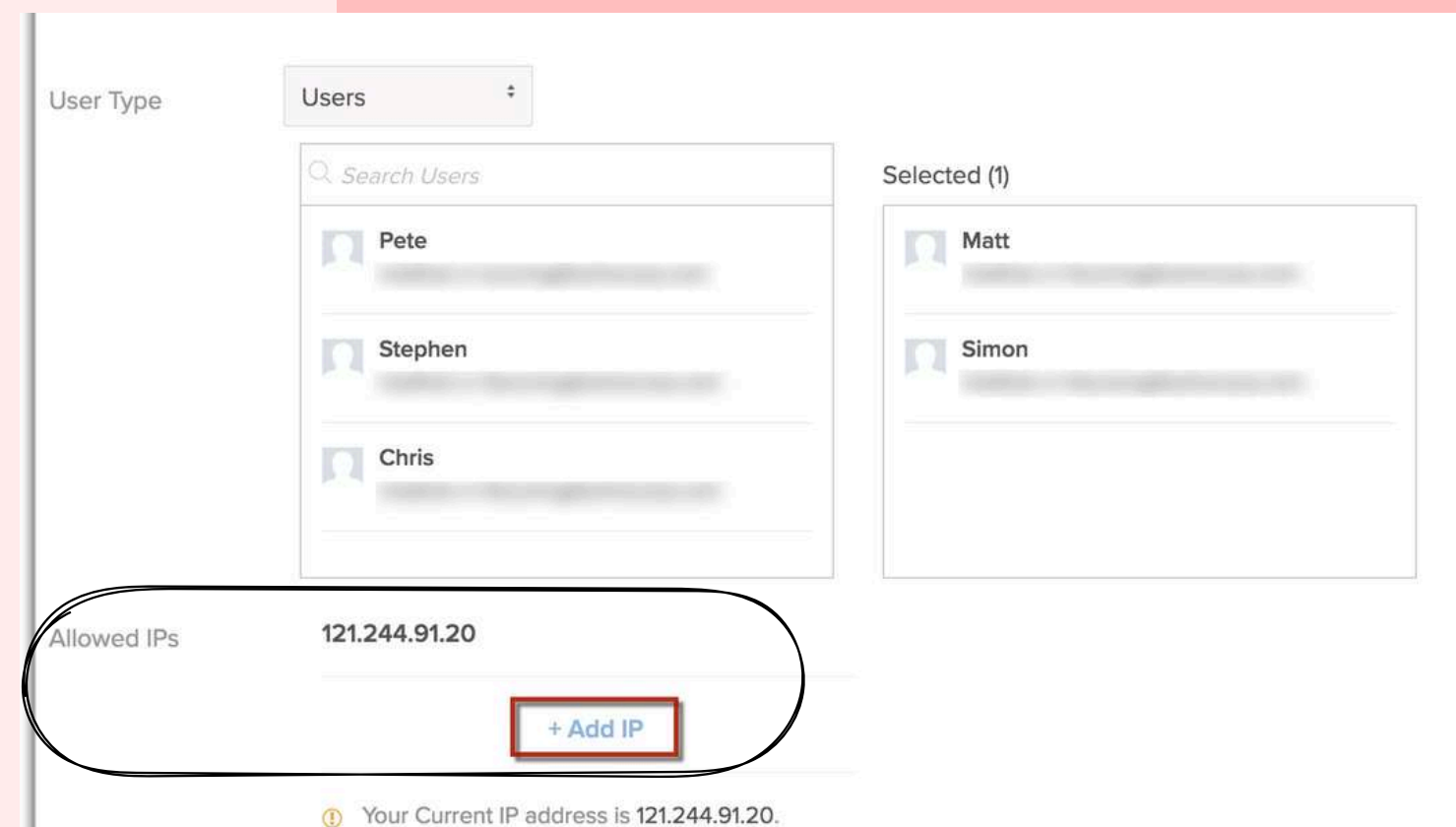


Enhance Customer Experience

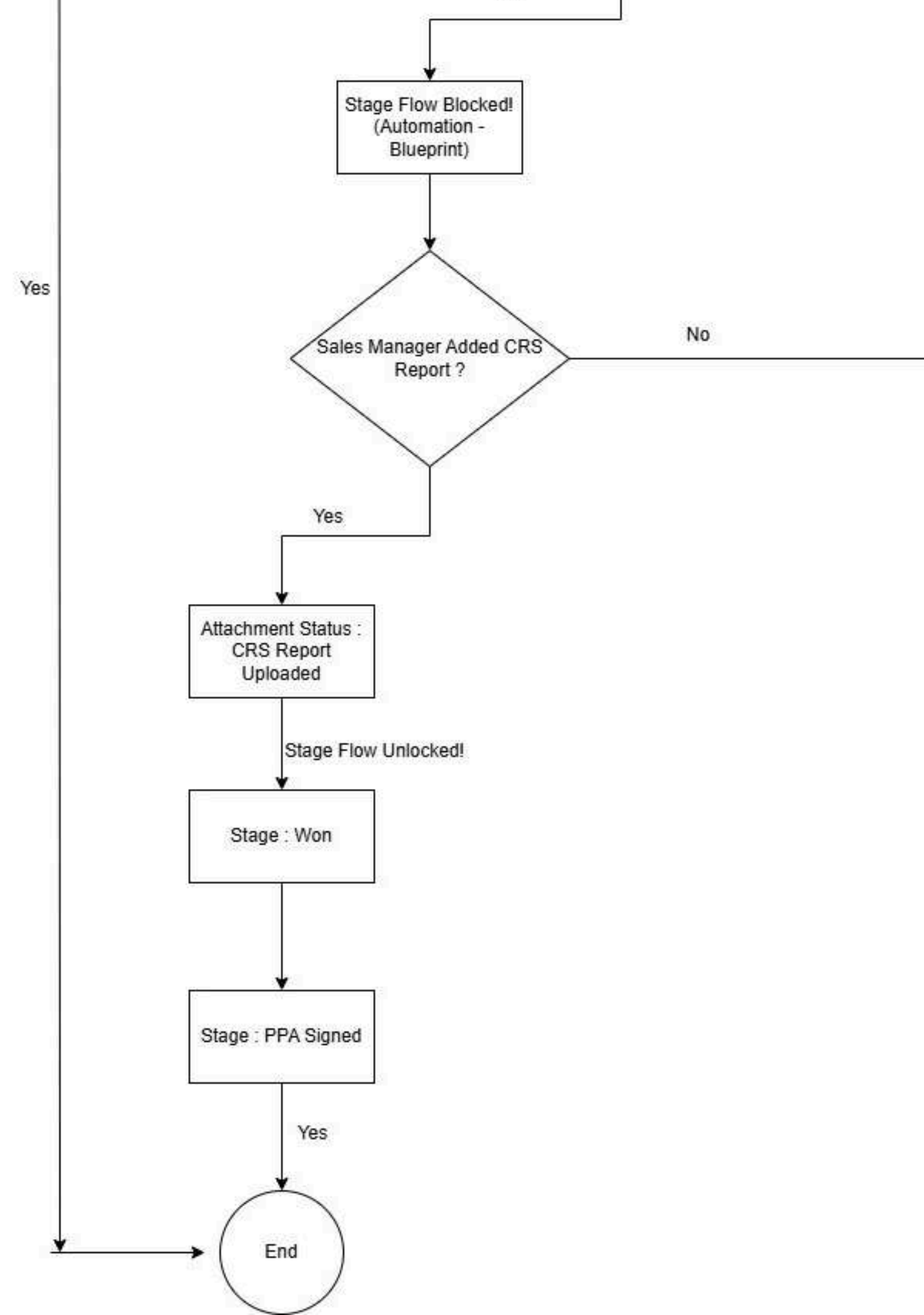
With centralized customer data, they could offer more personalized services, which leads to increased customer satisfaction.

Enhance Data Security

Zoho CRM's robust security features and data encryption ensured the confidentiality and integrity of customer data. This enhanced security protected the company's reputation and ensured compliance with data protection regulations and legal issues.



FLOW CHART



OUR RESULTS



90% Increase in Lead Conversion



80% Better Data Filtration Process



83% Increase in Data security



95% Increase in Customer Engagement





About CRM Masters Infotech


ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

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.



Get to know us better

Please take a look at how we can create success together.

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