

The background of the slide shows several hands holding large stacks of US dollar bills (20s and 100s) against a blue sky with white clouds. The word 'ZOHIO' is faintly visible in the center of the image, overlaid on the money.

Zoho Solution for the Funding Industry

Client Profile

They were founded in 1989 and are a client-first investment banking team advising industry-leading companies across North America and worldwide. They are funding experts and provide consulting and advisory services on R&D Tax credits, Grants, and Patent boxes. They have combined experience in the R&D tax sector and a dedicated team consisting of team engineers, scientists, construction experts, and more.

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





Project Background

The client needed a clear and efficient system to manage lead generation, Centralised data, contract handling, custom applications and much more. Their manual processes made it hard to track leads, ensure timely follow-ups, and manage orders smoothly, which impacted their overall efficiency.

CRM Master's Infotech implemented the **Zoho** to simplify and automate these processes. This solution provided a step-by-step framework for handling leads and a centralised data system ensuring nothing was missed and every stage was handled correctly.

➤ Industry We Served

Funding

➤ Region

London



Technology We Used



Zoho Sign



Zoho Reports (Zoho Analytics)



Zoho Creator

Challenges Faced by Our Client

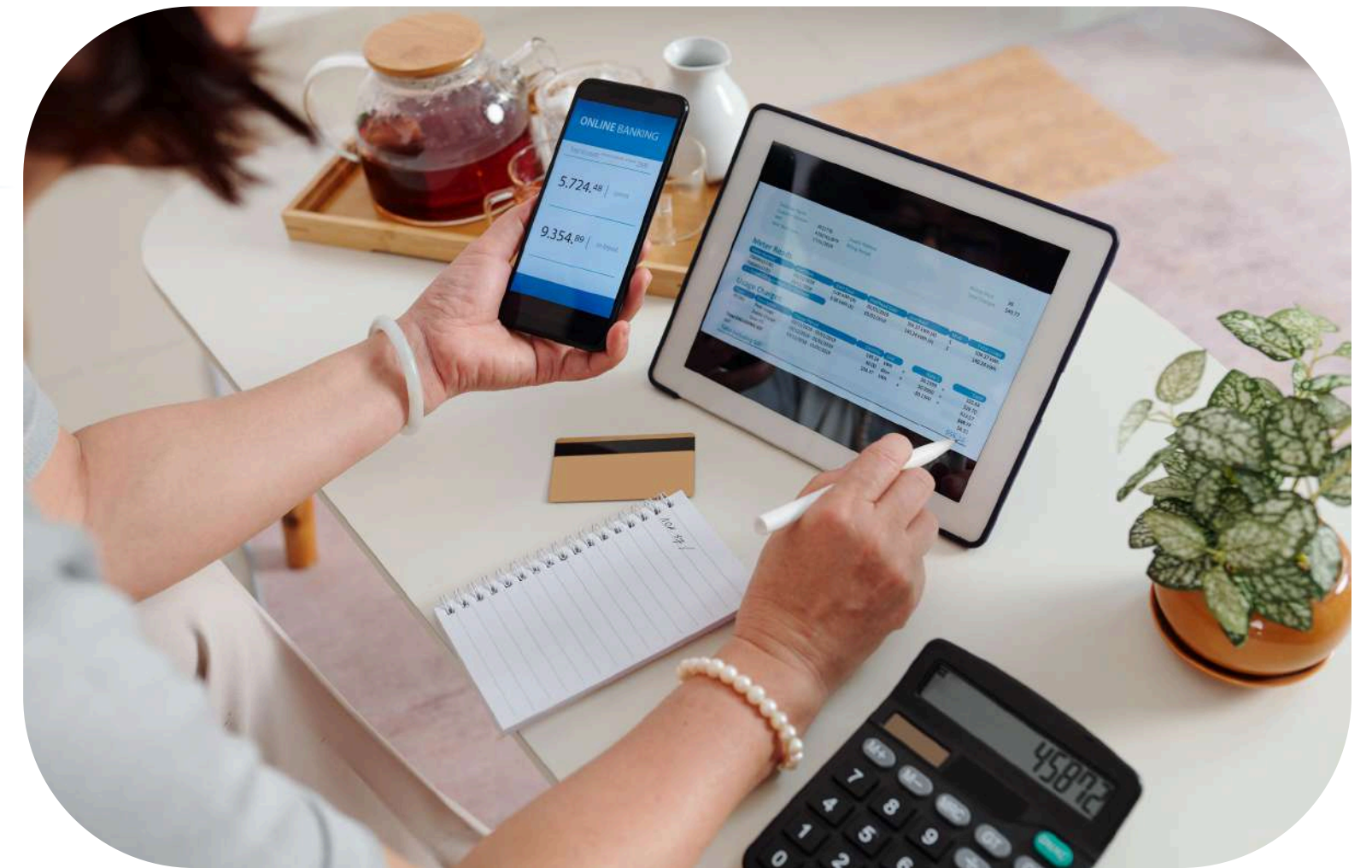


➤ Lack of Centralised Data

Data was spread across multiple systems and spreadsheets, making it challenging to track progress, measure performance, and generate meaningful insights for business improvements.

➤ Invoice Billing Manually

They need customised invoices and instant payments because manual billing reduce their business growth.

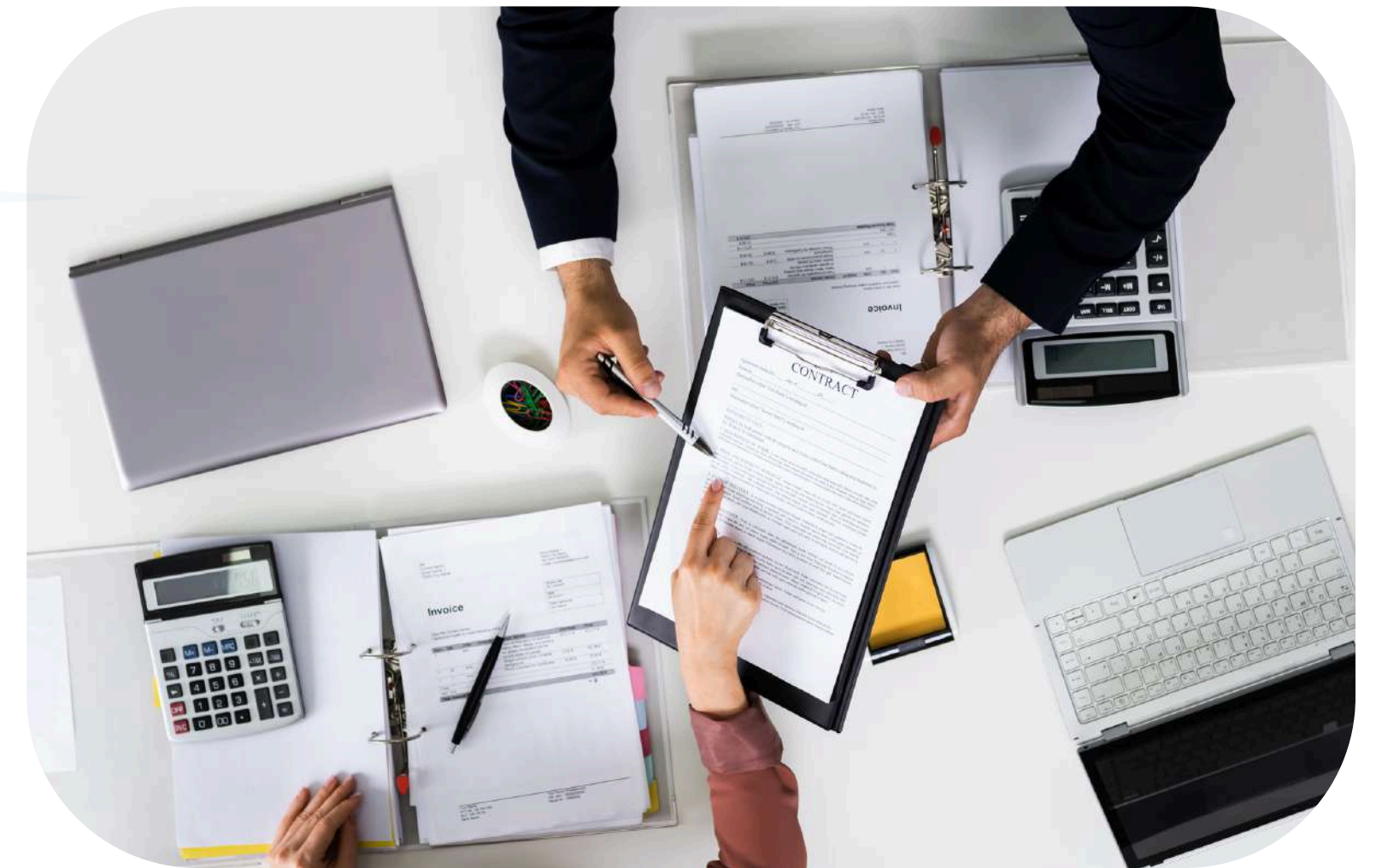


➤ Manual Data and Contract Handling

Their manual process is time-consuming, which leads to errors and delays.

➤ **Contract Automation**

Managing contracts manually was slow, which led to errors and was expensive. This caused delays in their business process.



➤ **Improve Customer Real-Time Insights**

Existing systems couldn't provide real-time data about customer needs and behaviours. This made it hard to track trends, respond quickly, and make informed decisions.

Solution Proposed



➤ **Zoho Sign API Integration**

➤ **Xero Integration**

➤ **Zoho Creator**

➤ **Zoho Reports**

➤ **Zoho Sign**

➤ Zoho Sign API Integration

Our team integrated Zoho Sign to automate the contract signing process to customise with widgets and create a unified workflow.

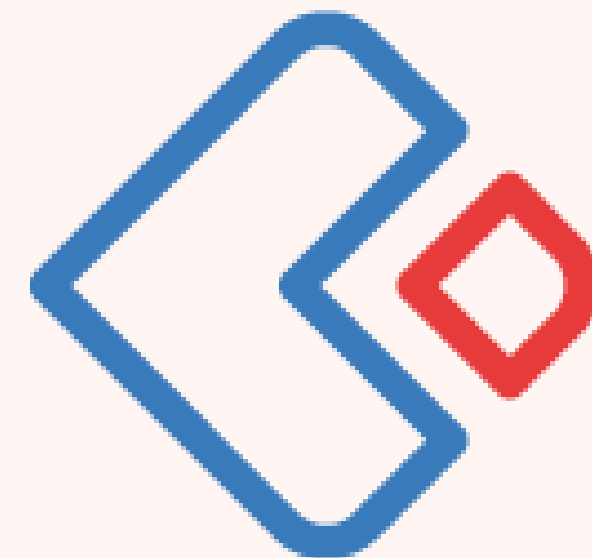


➤ Xero Integration

We integrated Xero to streamline the financial process for accurate decision-making

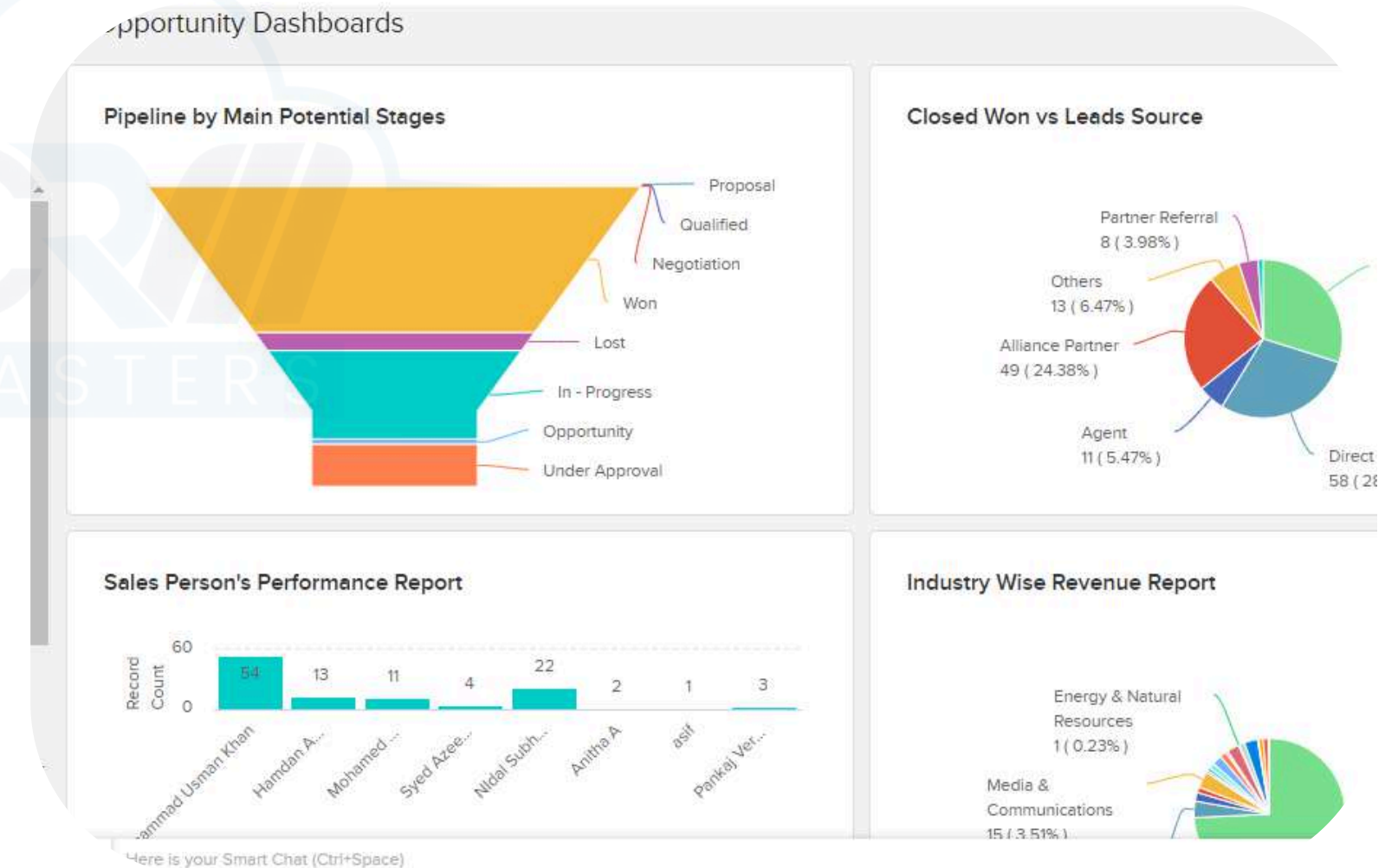
➤ Zoho Creator

To overcome these issues, our company implemented the Zoho Creator low-code platform to develop custom applications specific to their unique business process. Our experts build custom applications for project management and other critical workflows.



➤ Zoho Reports

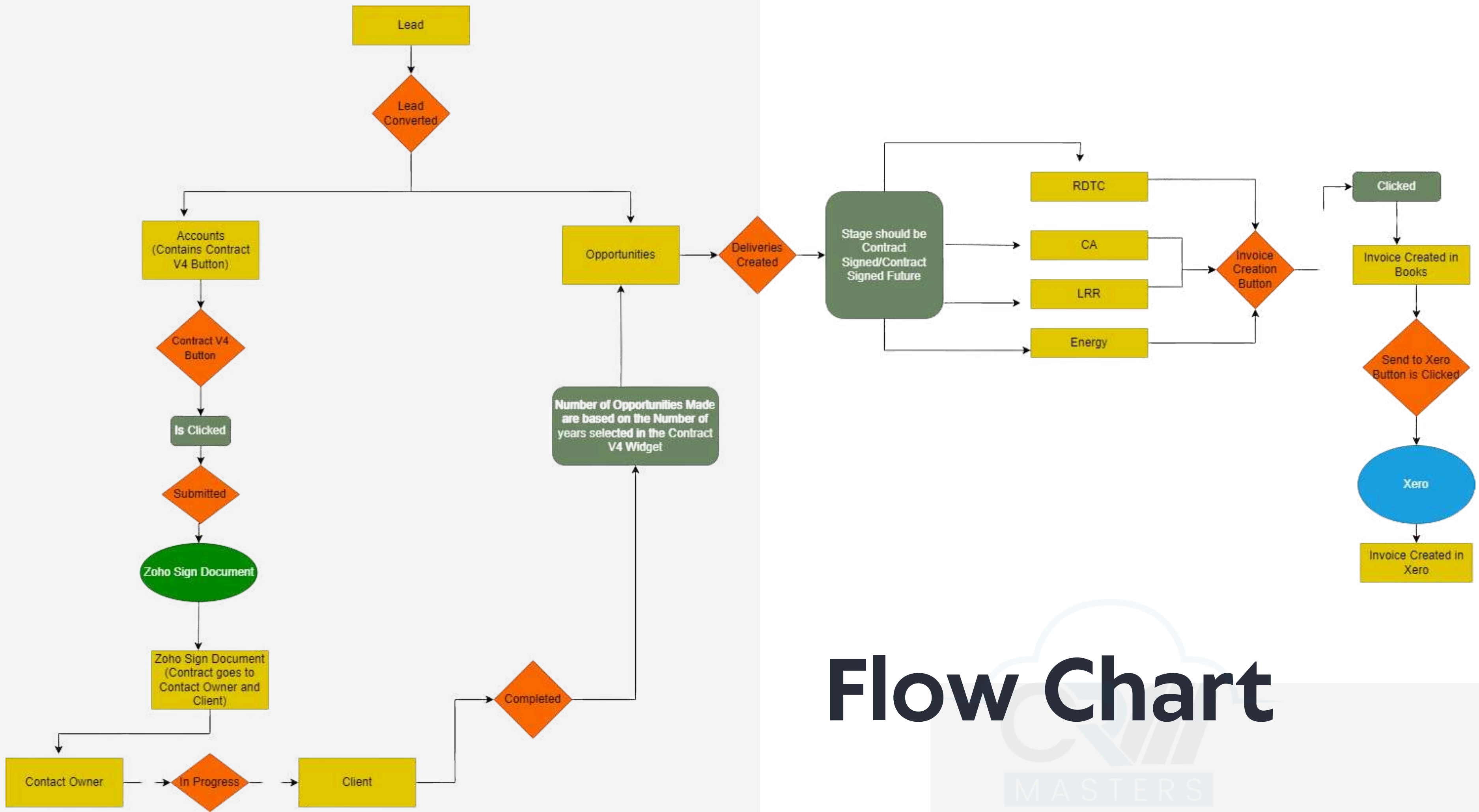
Our company initiated the implementation of Zoho Reports and seamlessly integrated the platform with existing data sources to create a centralized repository for comprehensive analytics. We work closely with them to customize the reports and dashboards to ensure critical stakeholders can access real-time insights. We sync the multiple app data with the help of Zoho analytics. Also, we have resolved the SQL query and made the reports, charts, Pivot tables, and PPT using Zoho Analytics to construct the required reports easily.



Zoho Sign 

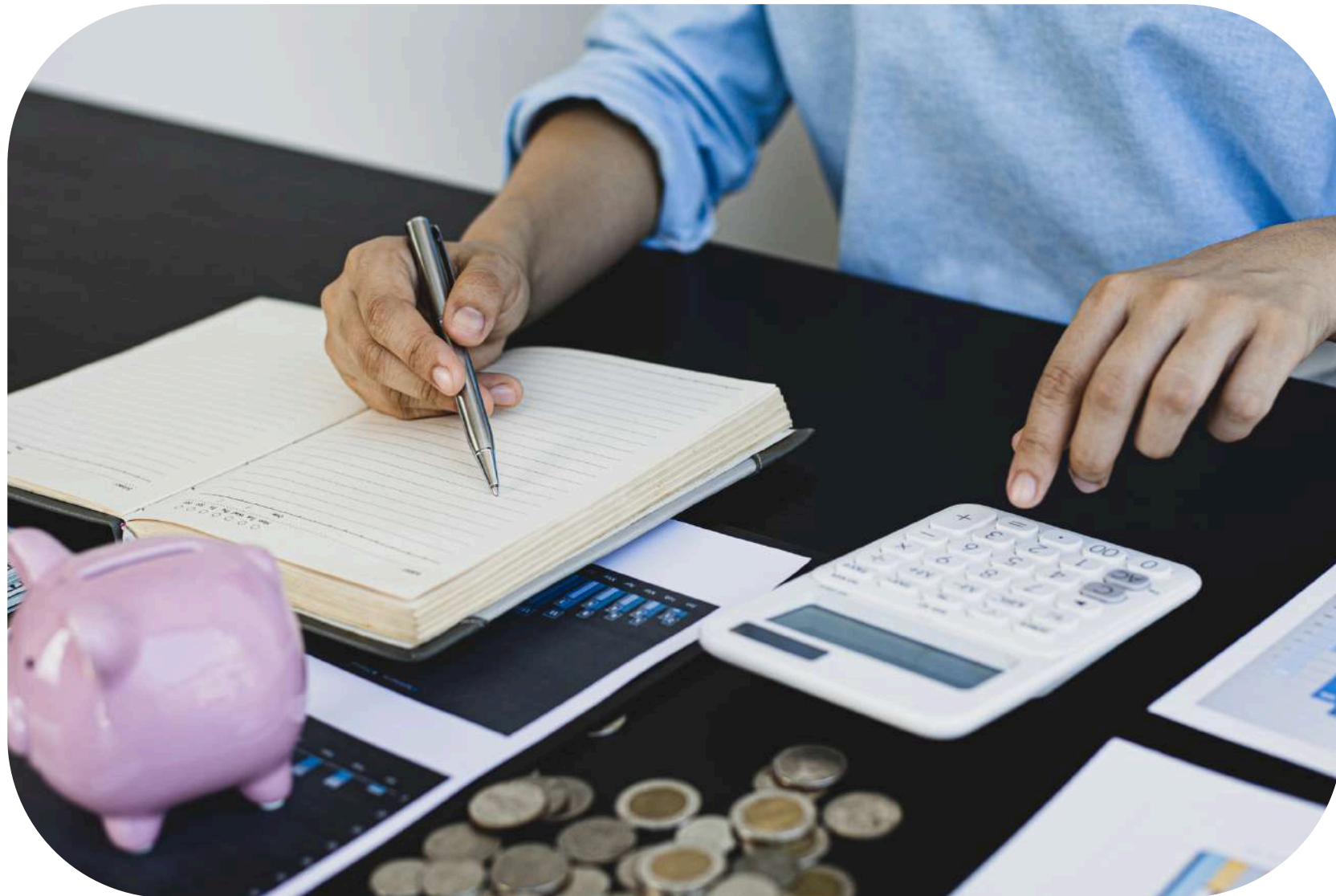
➤ Zoho Sign

With the implementation of Zoho Sign, their contact management process is improved. We seamlessly integrated the electronic signature solution into existing workflows, automating the approval cycle and reducing manual paperwork.



Flow Chart

Results



➤ Efficiency and Time-Saving

After implementing Zoho Sign, their automated contract processes reduce manual efforts and streamline data access and reporting, saving time for strategic initiatives.

➤ Improved Accuracy and Compliance

After implementing Zoho, they reduced manual data entry and minimized the risk of errors. They also gain secure and compliant electronic signatures for their business growth.



➤ Financial Visibility

With the integration of Xero, they gain a clear financial picture and make informed financial decisions to contribute to overall business success.



➤ Enhanced Collaboration

Their data become centralized and integrated to foster collaboration. Also, their teams can make informed decisions based on real-time information.



85%

Increase in Efficiency
and Time Saving

90%

Increase in Time
Management

90%

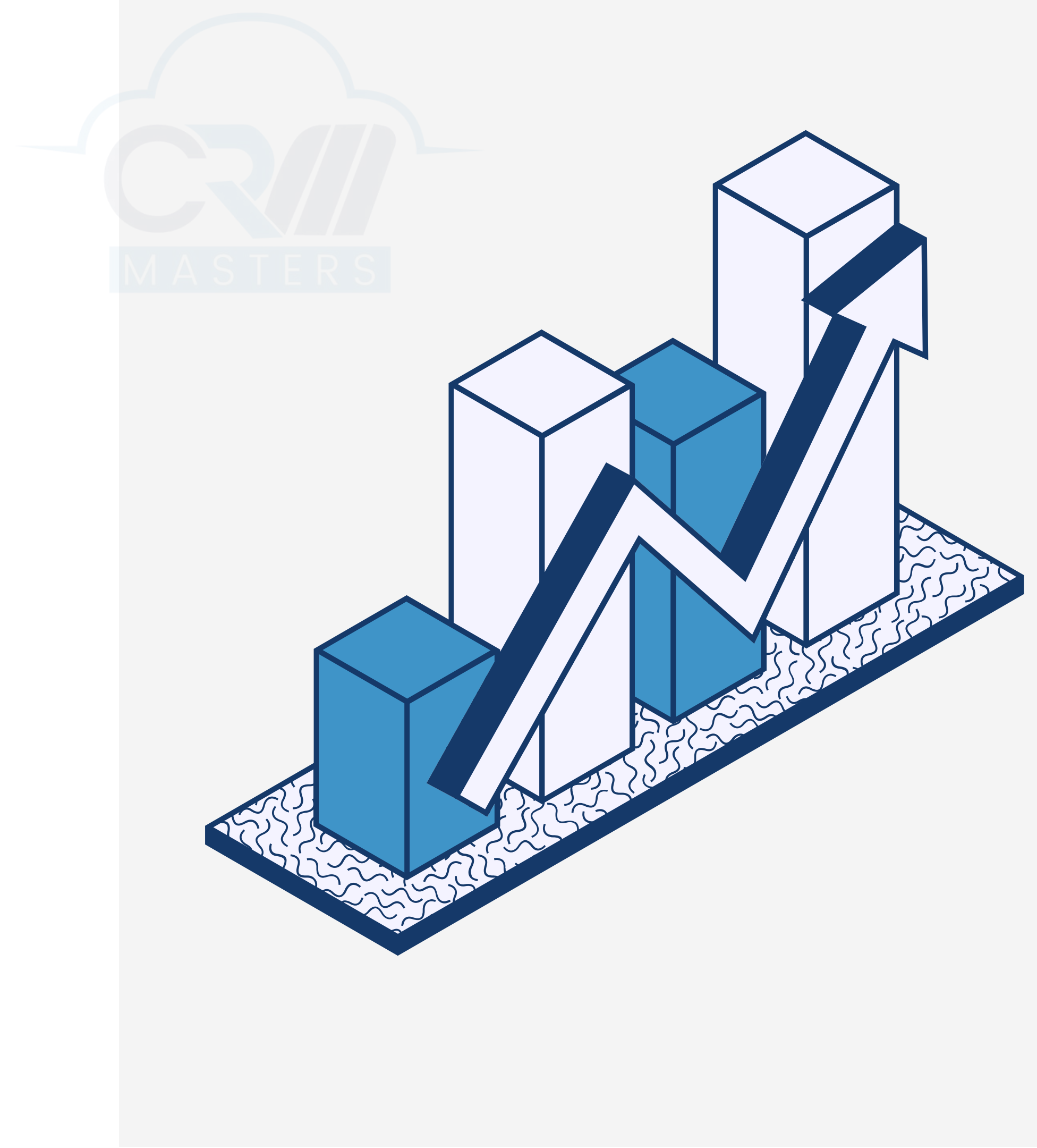
Less Manual Work

90%

Increased Financial
Visibility

89%

Enhance Collaboration





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 over 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.

Let's Talk & Find Your Solution



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