CRM MASTERS

ZOHO

Zoho for London-Based Removal and Storage Company

Client Profile

Our client's journey began in 2008 when they established a London-based removals and storage company amidst one of the most challenging economic crises. Despite these adverse circumstances, they persevered, crafting a resilient business model. Their dedicated team, comprised of seasoned professionals, offers a comprehensive suite of services, spanning from packing to thorough cleaning, all aimed at delivering a seamless and stress-free house-moving experience for their customers. Committed to ensuring customer satisfaction, our client goes the extra mile by maintaining comprehensive coverage through Goods in Transit and Public Liability insurance, ensuring the protection of their customers' belongings throughout the entire moving process.

CURRENT LANDSCAPE

Managing Manually

Business Type

B2C (Business to Customer)

Region

United Kingdom

Technology We Used

- Zoho CRM
- Zoho Desk
- Zoho Books
- Zoho SalesIQ
- MySQL
- Zoho Project
- Zoho Vault
- Zoho Connect
- PHP/Laravel
- WordPress & AWS

Project Background

In order to streamline and automate their customer onboarding procedure, they searched for a solution. Additionally, they were looking for a system that could step up and improve the efficiency of their internal operations, including data sharing, internal management, accounting, etc. We recommended ZOHO One to them after evaluating their business requirements and implementing it for their company with 10 users. For them to manage their business activities, Zoho CRM, Zoho Desk, Zoho SalesIQ (Answer BOT and Zoho BOT), and Zoho Email Service were introduced.

Additionally, they began utilizing the ZOHO Project for internal administration, ZOHO Vault for credential sharing, and ZOHO Books for accounting. Customized CRM built on Laravel was developed for an excellent user experience so that the licensing cost is not impacted as the business grows.

Their business objectives were:

- Streamlined storage system
- Proper website for managing their business
- Streamlined payment getaway
- Automation in data management

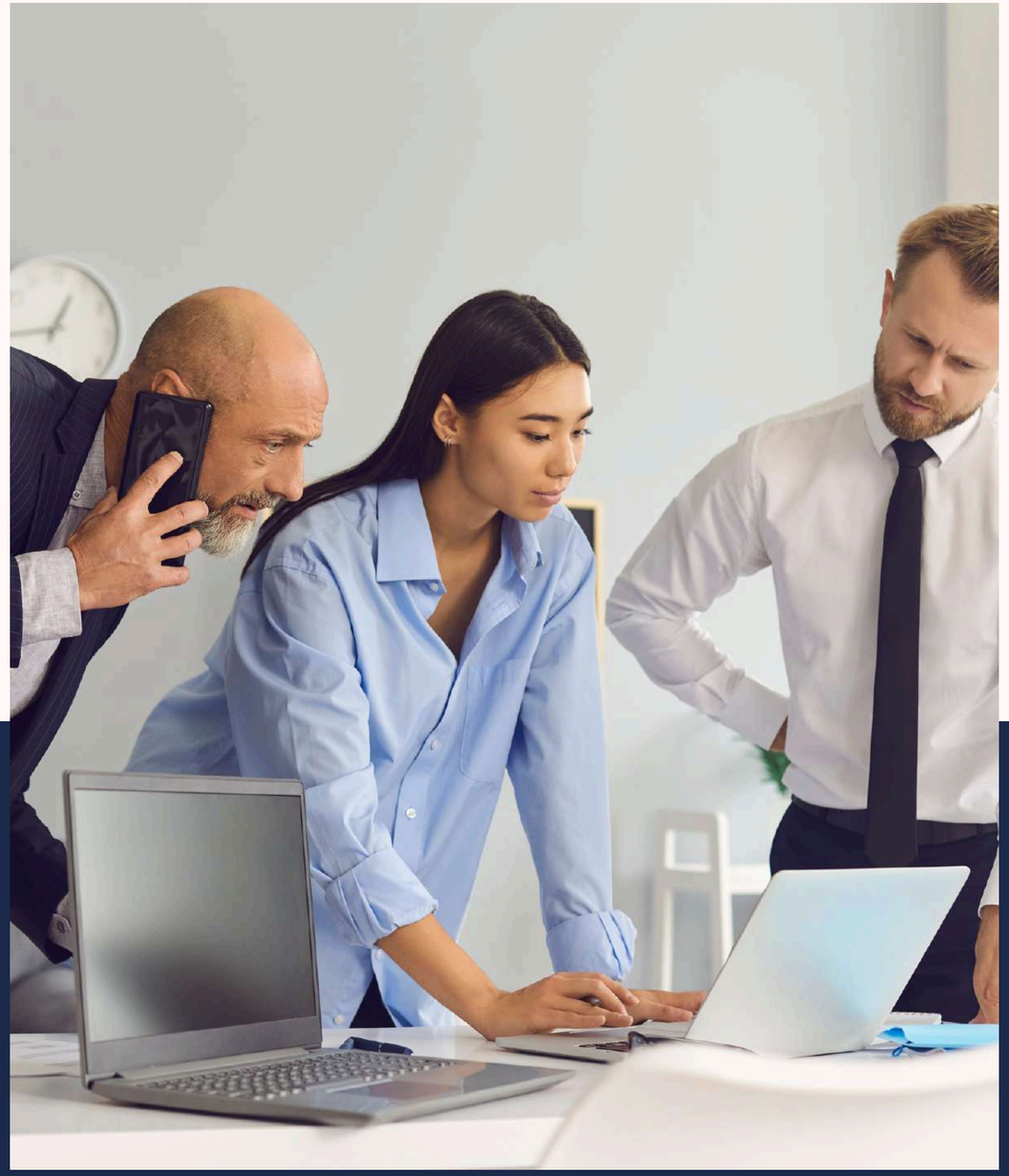
Challenges Faced by Our Client

1. Lack of an Effective Website:-

The absence of an efficient website was probably an obstacle to their marketing goals, hampering their ability to reach a wider audience and showcase their services effectively.

2. Data Storage Challenges:-

Our client struggling with difficulties related to storing and managing client data efficiently. Their existing system fell short of providing the necessary organization and accessibility.



3. Manual Data Management :-

Relying on manual data management via spreadsheets resulted in time-consuming processes and exposed them to the risk of human errors, potentially affecting the quality of their service.

4. Communication Issues :-

Challenges in sending SMS and emails to their customers were impeding their ability to maintain clear and timely communication with their client base.

Our Solutions

- Website Development
- Payment Gateway Enhancement
- Data Management with Milly
- Zoho CRM with Milly
- Zoho CRM with Clientportal
- Customer Data Management with Zoho CRM
- Zoho Desk
- Typeform with Milly
- Zoho Project
- Stripe with Website
- Stonely with Clientportal
- Zoho Books
- Zoho Cliq
- Zoho CRM
- Zoho SalesIQ
- Zoho Connect
- Zoho Vault

Website Development:

To address the need for an effective online presence, we helped them develop a professional website that not only served as a marketing tool but also streamlined various business processes.

Data Management with Milly:

To overcome data storage challenges other than Zoho CRM, we helped our client migrate data in the third-party application 'Milly,' which resulted in a complete solution for efficient data management.

Payment Gateway Enhancement:

We tackled their payment gateway issues, ensuring a smoother and more secure payment experience for their customers directly through the website.

Customer Data Management with Zoho CRM:

We streamlined customer data management by implementing Zoho CRM, improving data accessibility and organization.

Zoho CRM:

Important part of their customer relationship management efforts. This allowed them to nurture leads, manage client interactions, and streamline their sales processes effectively.

Zoho Desk:

For superior customer support, they implemented Zoho Desk, ensuring quick and effective responses to customer inquiries and concerns.

Zoho SalesIQ:

Zoho SalesIQ provides valuable insights and tools for lead generation and conversion. This tool aims to fulfill their sales endeavors which results in increased revenue.

Zoho Project:

For their internal team management and project coordination, Zoho Project is the go-to platform. It facilitated task management, project tracking, and team collaboration.

Zoho Connect:

Their efficient task delegation and team communication became a reality with Zoho Connect, ensuring seamless coordination across departments.

Zoho Cliq:

Real-time team collaboration and meetings were made easy with Zoho Cliq, fostering productive discussions and task coordination.

Zoho Vault:

We helped them prioritize their data security by using Zoho Vault for securely sharing sensitive credentials among team members.

Zoho Books:

For meticulous accounting and financial management, we helped them with Zoho Books to maintain financial clarity and accuracy.

Typeform with Milly:

The integration of a feedback form with 'Milly' allowed customers to leave feedback and help our client analyze for continuous improvement.

Stonely with Clientportal:

The integration of 'Stonely' with the client portal provided customers with a step-by-step guide to the services offered, enhancing their understanding and experience.

Zoho CRM with Milly:

Seamless data transfer from Zoho CRM to the third-party app 'Milly' ensured data consistency and accessibility.

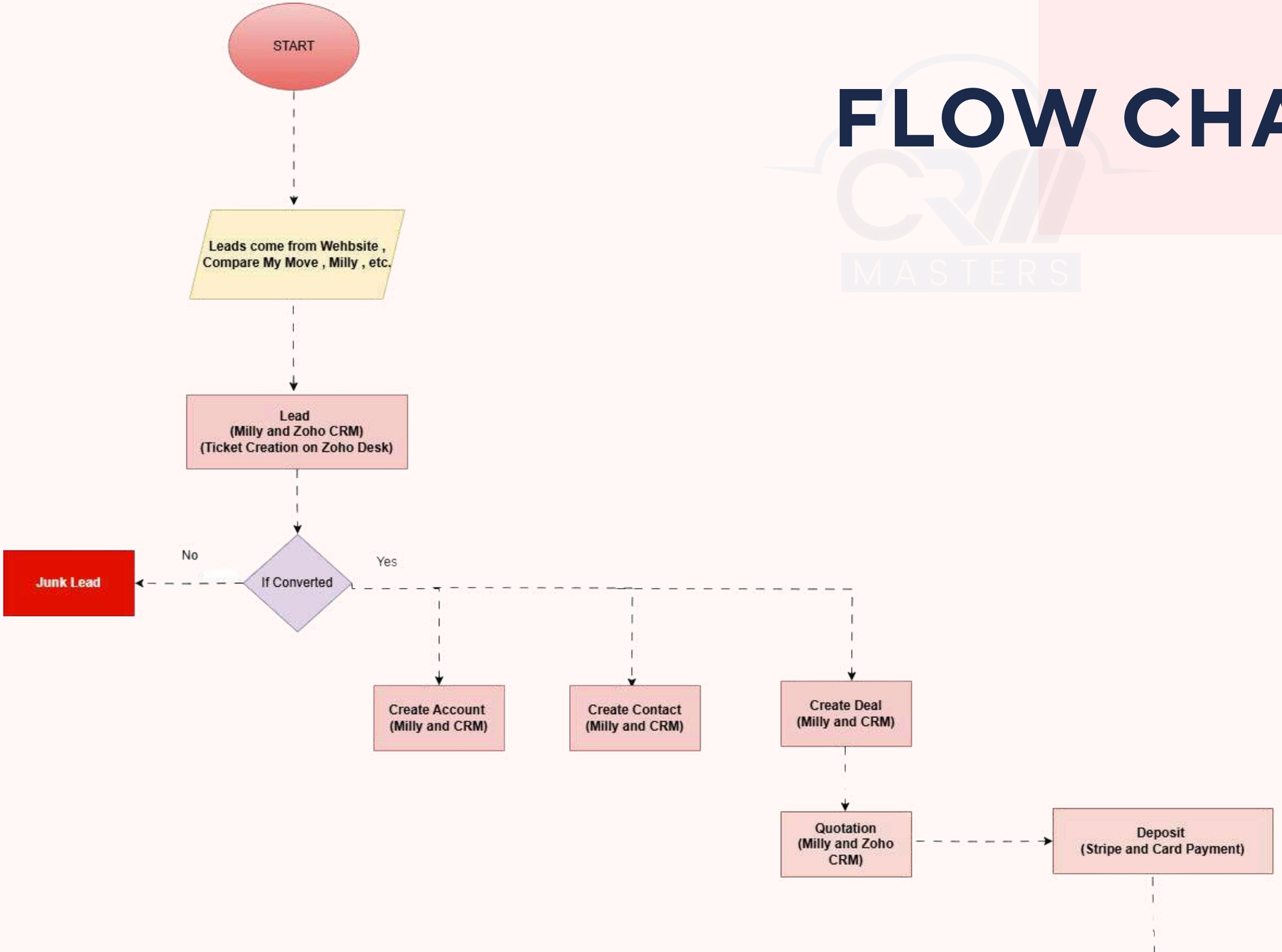
Zoho CRM with Clientportal:

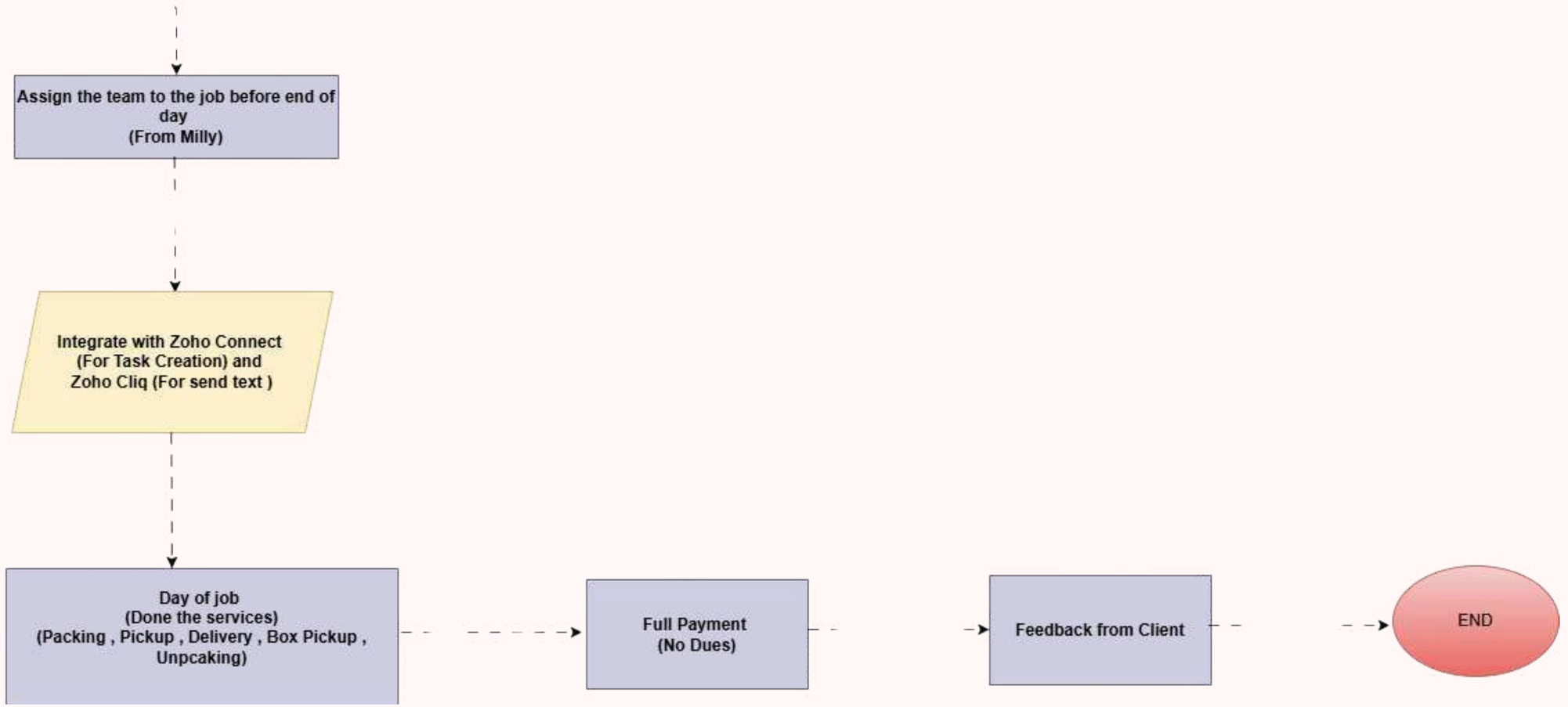
Integration with the client portal enhanced customer service by providing a better understanding of the services offered.

Stripe with Website:

Integration of Stripe payment with the client's website facilitated convenient and secure online payments.

FLOW CHART


START
Leads come from Wehbsite , Compare My Move , Milly , etc.
Lead (Milly and Zoho CRM) (Ticket Creation on Zoho Desk)
If Converted
No
Junk Lead
Yes
Create Account (Milly and CRM)
Create Contact (Milly and CRM)
Create Deal (Milly and CRM)
Quotation (Milly and Zoho CRM)
Deposit (Stripe and Card Payment)


Assign the team to the job before end of day
(From Milly)
Integrate with Zoho Connect
(For Task Creation) and
Zoho Cliq (For send text)
Day of job
(Done the services)
(Packing , Pickup , Delivery , Box Pickup , Unpcaking)
Full Payment
(No Dues)
Feedback from Client
END

Results

We have addressed our client with solutions for their required needs:

Efficient Data Storage:

Our solutions led to significant improvements in data storage and management, ensuring that critical information was readily accessible and well-organized.

Streamlined Payment Gateway:

The resolution of payment gateway issues resulted in a smoother and more secure transaction process, boosting customer confidence.

Proper Data Management:

Through automation and organization, we successfully addressed the challenges associated with manual data management, reducing the risk of errors and inefficiencies.

Customer Data in Third-party Application:

The implementation of a robust system for maintaining customer data within the third-party application streamlined processes and improved data integrity.

We have successfully addressed all the business requirements for our client, giving them the best solution for their business needs, the results of which are listed below:

- 98-99% Improvement in Lead Management
- Achieve a smoother & more reliable payment process
- 95-97% Accomplished customer satisfaction.
- Enhanced marketing strategy.
- CRM on Laravel saved the sales team licensing costs.

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About CRM Masters Infotech

ENABLING GROWTH THROUGH DIGITAL TRANSFORMATION

CRM Masters Infotech is a leading CRM Consultant based in India, the UK, and the USA. We specialize in providing customized CRM solutions for unique business needs & helping them increase their productivity. Our team of certified, experienced, and expert developers is dedicated to creating the most innovative and effective solutions for our clients and their business needs.

LET'S TALK & FIND YOUR SOLUTION

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