



**CANADA-BASED AI FIRM REDUCED  
COSTS & OPTIMIZED AUTOMATION  
WITH ZOHO CRM PLUS**





# CLIENT PROFILE

Our client is a Canada-based company specializing in creating AI-powered email marketing solutions. They offer advanced tools that empower businesses to automate and personalize their email marketing efforts, ensuring maximum engagement and improved customer communication. Their flagship products are trusted by businesses globally and have consistently outperformed other leading platforms on review sites such as TrustPilot.



## Current Landscape

The client was using Intercom CRM, but it was cost-prohibitive, so they sought a more cost-effective alternative.







# PROJECT BACKGROUND



The client approached us with the objective of replacing their existing Intercom CRM system with **Zoho CRM Plus** to reduce operational costs and improve automation capabilities. They needed a solution to integrate seamlessly with their AI-powered email platforms, optimize customer interactions, and automate various workflows. After carefully analyzing their business requirements, we implemented a customized solution using **Zoho** based on their requirements.



## Business Type

B2B (Business to Business)

### Their business objectives included:

- Seamless migration from Intercom CRM to Zoho CRM Plus.
- Enhanced automation for lead and customer management.
- Integration with email platforms to streamline marketing.
- AI-powered chatbot integration for real-time customer engagement.



Region

Canada



# Technology We Used



**Zoho CRM Plus**



**Zoho SalesIQ**



**Zoho Campaigns**



**Deluge Scripting**



**Zoho PageSense**



**Twilio Segment**



# KEY CHALLENGES FACED BY OUR CLIENT



## 01 Migrating from Intercom CRM to Zoho CRM Plus

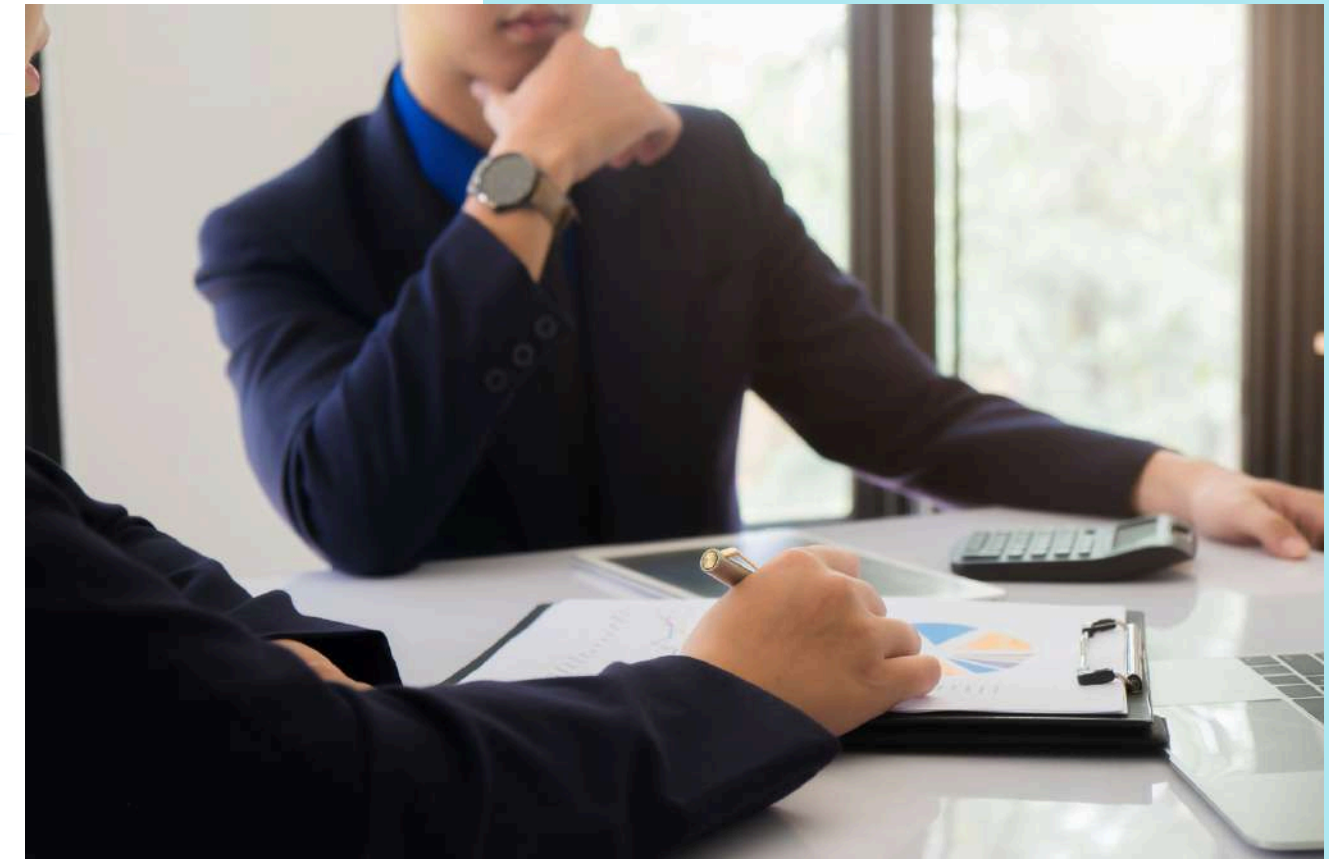
The client needed to replicate the functionality of their existing CRM system while ensuring a smoother and more cost-effective transition.

## 02 Email Integration Problems

They required a system that could effortlessly integrate with their email marketing platforms to enable real-time updates and personalized communication.

## 03 Facing Integration Difficulties

The client wanted to incorporate WhatsApp and AI-powered chatbots into their CRM for faster customer responses and improved engagement.







## 04 Data Migration Complexity

Migrating vast amounts of data from **Excel to Zoho CRM** while maintaining data integrity was a key challenge.

## 05 Limited Analytics and Insights

The client could not derive actionable insights from their existing data, hindering data-driven decision-making.

## 06 Limitations in Data Handling

The APIs used by the client had limitations on the volume of data that could be processed simultaneously, creating bottlenecks in data handling.



# OUR SOLUTIONS

## IMPLEMENTATIONS

### 01 Custom Zoho CRM Plus Implementation

We implemented Zoho CRM Plus that replicated the functionality of the client's previous CRM, while removing unnecessary fields and modules.

### 02 AI-Powered Chatbot Development

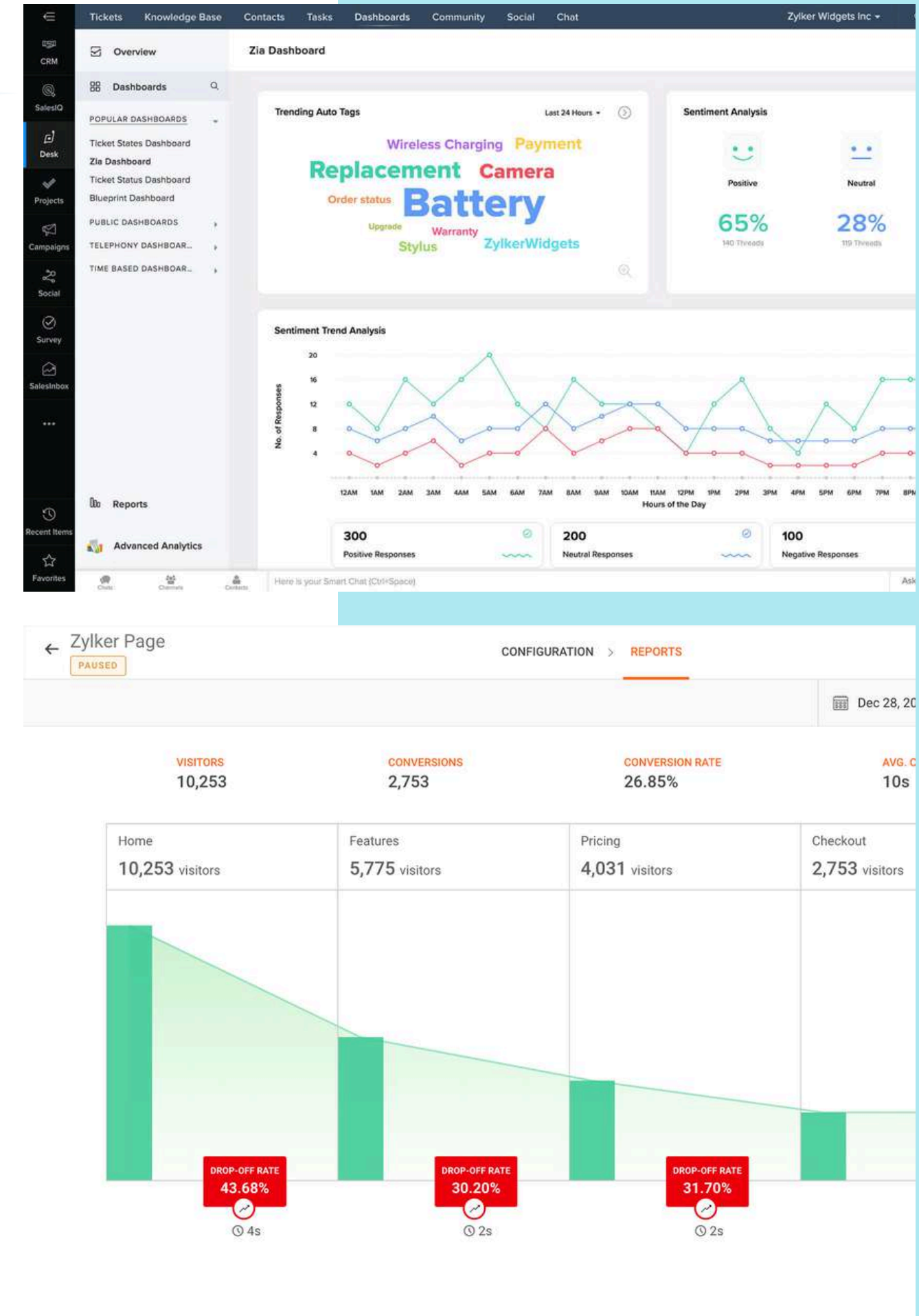
- Implemented Zoho SalesIQ for custom AI-powered chatbots to automate customer queries.
- Created a detailed knowledge base with FAQs and articles to support customer self-service.

### 03 Data Migration and Synchronization

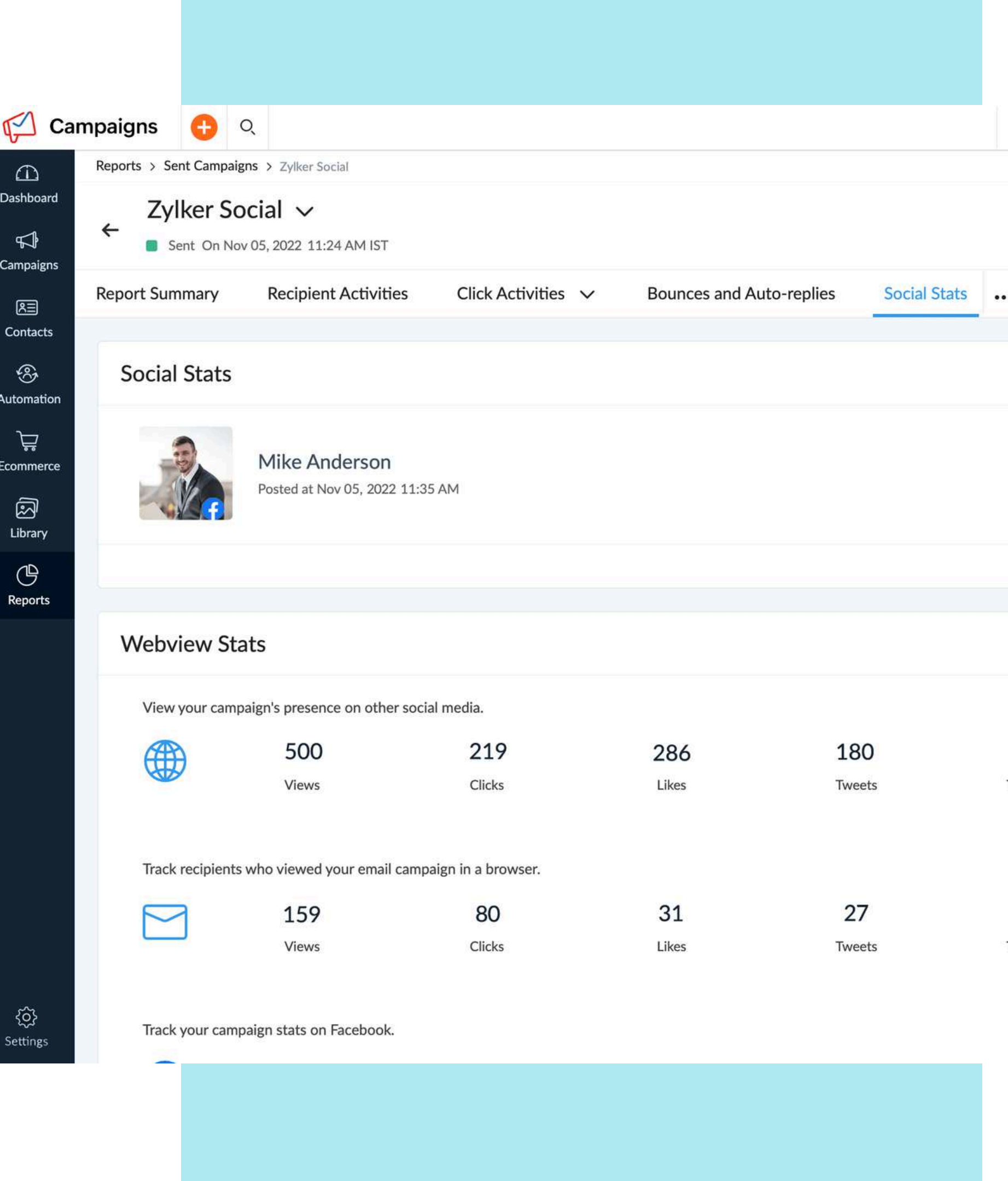
- Successfully migrated customer data from Excel spreadsheets to Zoho CRM, ensuring data accuracy and consistency.
- Implemented automated workflows to maintain seamless data synchronization between platforms.

### 04 Zoho PageSense Optimization

- Implemented push notifications to keep mobile users engaged with relevant updates.
- Enabled personalized web notifications to provide real-time information to website visitors.







## INTEGRATIONS

### 1. Zoho Campaigns Integration with Zoho CRM

We integrated these two to automate the marketing process and improve email marketing efficiency.

- Automated data sync between Zoho CRM and Zoho Campaigns to maintain consistent customer information.
- Created and configured draft campaigns to simplify future marketing efforts.
- Designed brand-aligned templates for quick and efficient campaign launches.
- Ensured smooth email deliverability and sender authentication through domain mapping.





## 02 Integrated Chatbot with ChatGPT

Using this integration, the client was able to provide customers with contextual and intelligent responses, which resulted in a good customer relationship.

## 03 Zoho CRM Integration with WhatsApp & Email

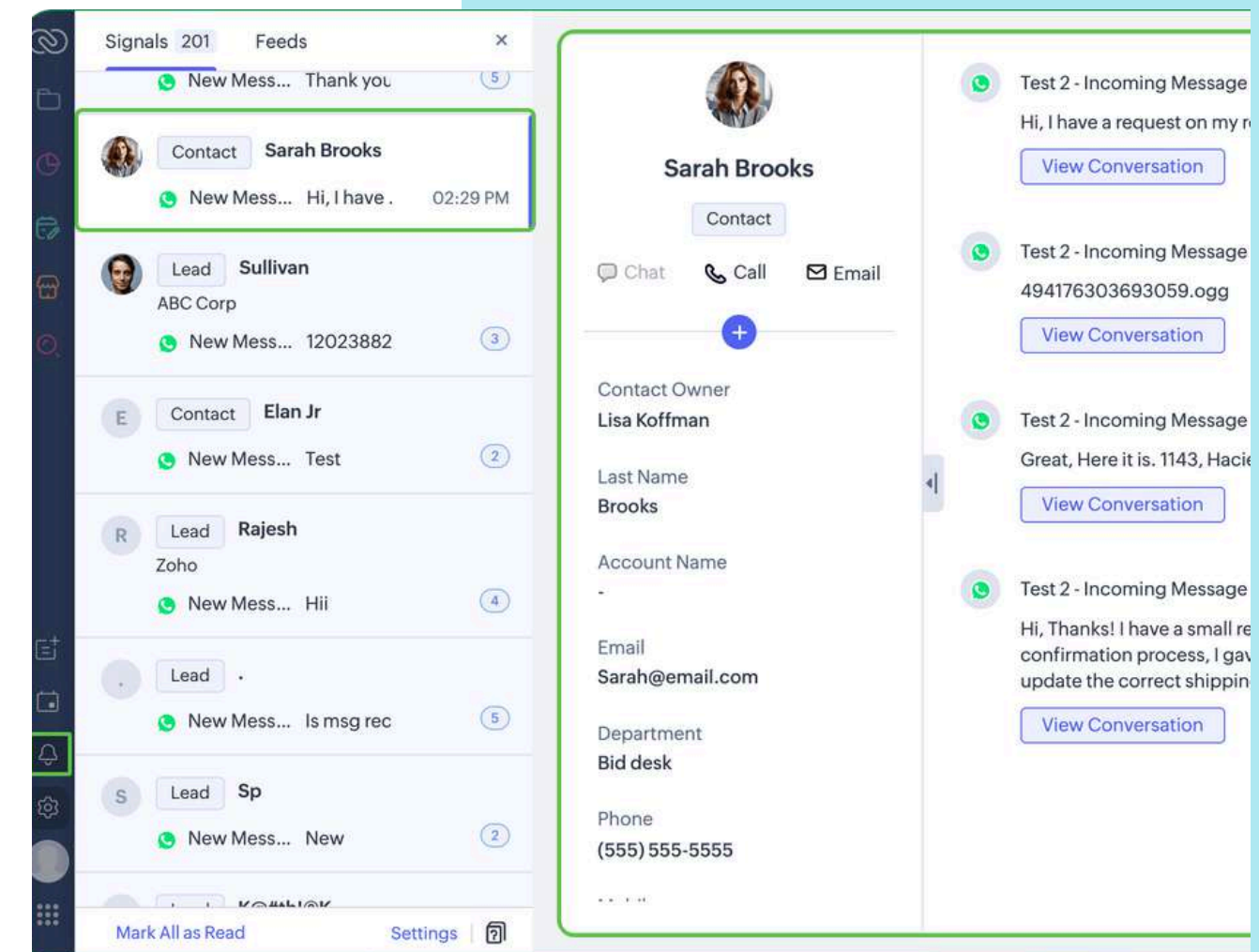
- Integrated the client's email marketing platforms with Zoho CRM for real-time updates and improved personalization.
- Integrated WhatsApp within Zoho CRM to allow direct communication with leads and customers.

## 04 Website Integration

We have also integrated their two flagship products with Zoho CRM. By this, the client can now easily track interactions and respond promptly, enhancing overall customer satisfaction.

## 05 Custom Integration with Twilio Segment

Integrated Twilio Segment with Zoho CRM to enhance customer segmentation and analytics to gain deeper insights into customer behavior.







# RESULTS

Our implementation of Zoho CRM Plus enabled the client to achieve their business objectives effectively, resulting in significant improvements.



## Key outcomes included :

- Reduced CRM costs by transitioning from Intercom CRM to Zoho CRM Plus
- Enhanced real-time customer interactions through AI-driven chatbots and WhatsApp communication.
- Migrated and synchronized data without any data loss.
- Simplified customer management processes with automation, reducing manual effort
- Delivered detailed analytics reports, which helped client to make better and informed decisions.





## Performance Improvement



**90%**

improvement in email  
marketing with Zoho  
Campaigns



**95%**

customer satisfaction with  
AI-drive chatbots.



**90%**

reduction in email response time.



**80%**

Improved decision-making  
using real-time analytics.



**30%**

reduction in operational  
cost with Zoho CRM Plus.







# About CRM Masters Infotech

ENABLING GROWTH THROUGH  
DIGITAL TRANSFORMATION

CRM Masters Infotech is a leading **consulting company** providing CRM, ERP, and Ecommerce solutions, specializing in providing customized **Zoho solutions** for businesses worldwide.

Our expertise lies in CRM implementations, integrations, migration and automation, ensuring that our clients can optimise their operations and achieve their business goals efficiently.

Our certified team of **100+ developers** is committed to delivering innovative and cost-effective CRM solutions customised to meet the unique requirements of businesses across various industries.





# LET'S TALK & FIND YOUR SOLUTION



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**Schedule an Appointment**

