

Leading Provider of Lifting Solutions

Zoho CRM

● **Project Duration:** 7 Month

● **Users:** 15

● **Project Scope:**

The implementation of Zoho CRM application for the customer was focused on designing a software system which would help them to manage the business process and measure performance for different organizational functions. Modules including the forecasting module, leads module, potentials module, accounts module, contacts module and activities module were created to help them achieve their goals. Additionally, as part of the implementation process, we offered assistance in data migration, ensuring a smooth transition to the new system.

Problem Descriptions

The customer was looking for a software system and a process structure to manage business processes and measure performance for their organizational functions. It should be able to capture inquiries, prospects, and customer accounts for the sales team to have clarity and control over leads, and order booking and it should help them to measure performance across various functions and departments.

Solution Approach

V-Align's solution experts wanted to implement a comprehensive Zoho CRM system to automate all the pre-sales and marketing activities for the customer. Various modules are designed to achieve the client's requirements and enable them to manage customer relationships, track leads and optimize their sales pipeline.

The Forecast module in the CRM system is designed to help them manage order booking budgets for the sales target effectively. The Leads module allows them to keep track of leads and their sources. The Accounts module is ideal for managing customer accounts. In addition, the Activity and Contacts modules enable them to monitor activities related to sales and customer contacts.

We have also been able to leverage the technical features and customization capabilities of the Zoho CRM to give the business access to Sales Force Automation, Product Customization, Workflow Automation, Artificial Intelligence, Analytics and other functionalities. This includes sales forecasting, email insights, reminders, approval processes, funnel Analytics and many other helpful business activities.

Customer Experience

Automating various processes by using Zoho's applications has enabled them to streamline their operations, quickly identify and fix inefficiencies, and improve overall operational performance. With multiple iterations of requirement gathering, we have ensured that the product built meets the needs of the organization.

Outcome

We have implemented Zoho CRM which can help the organization manage all the pre-sales and marketing activities. This has helped the business to streamline all the business processes and has given the control to manage the leads and provide clarity about inquiries, prospects and customer accounts. Implementing marketing automation has enabled the organization to enhance marketing efficiency and improve lead generation and lead nurturing abilities.

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