

An Information Technology and Services Organization
located in USA, Europe and Asia

Zoho CRM, Zoho Desk and Zoho Analytics

● **Project Duration:** 4 Months

● **Users:** 86

● **Project Scope:**

This implementation was focused on providing the client with improved workflow related to sales organization structure, sales forecasting, inquiry management, customer account management, customer contact management, and deal management. We succeeded in integrating various third-party applications into the Zoho CRM system. This includes applications like Avangate Sales, E5 Sales, PayU, Akamai, and File Burst. This software implementation has led the customer to improve operational efficiency. The implementation of this project marks a notable achievement for V-Align, considering the extensive scope that spans eighty-six users situated on three continents.

Problem Descriptions

The customer approached us at a time when they were predominantly using manual methods to maintain customer service and support activities. They were looking for a software application that would help them streamline all the related processes. They needed a software that can improve their speed and efficiency in managing customer support, SLAs, ticket allocation and department query activities. Another key requirement for their business was a software that would be able to structure and transform the data set for timely analysis and reporting.

Solution Approach

In order to improve customer service and make information more accessible, we have implemented Zoho Desk. The users can now handle customer queries related to products effectively. We have built customized modules and developed automation features to manage tickets, SLA configuration and workflows.

In addition, we have made effective use of Zoho CRM to manage activities related to Leads, Contacts, Accounts, Opportunities, E5 Sales, Avangate Sales, Resellers and Products with module customization and workflows.

We implemented Zoho Analytics for dashboards and reporting. These dashboards were designed to measure weekly sales reports, Target v/s Achieved Revenue, Product wise sales reports, Refunded, chargeback and sales.

Furthermore, Zoho SalesIQ has been implemented for tracking website visitors and resolving queries through chats.

For customer issue resolution and feedback management, we have implemented Zoho Survey.

Customer Experience

The client allocated the right champions across departments during the implementation cycle. There was adequate support from the Top Management. Various challenges related to data migration, functional requirements and user acceptance testing were managed by the projects team and also sponsor teams from both organizations effectively. Both teams collaborated with high commitment to unblock technical and non-technical issues. All this resulted in great teamwork and experience!

Outcome

The customer is now happy that all departments can access the data centrally with increased collaboration, improved sales, and system-generated alerts to ensure critical activities and follow-ups. This system will enable the team to interact with leads/opportunities and track their expectations on time, effectively capture the transition of prospects in the pre-defined stages of the sales process, enjoy collaborative teamwork, receive system-generated alerts to ensure timely follow-ups and enable the managers to take decisive action using the Dashboards.

Contact Us



#64, 4th Floor, "Parimala Towers",
MES Road, Yeshwanthpur,
Bengaluru - 560 022



transformsales@v-align.in



Mobile: +91-7353769605
Office: 080-41659605



<http://www.v-align.in/>