

# Reliable & Simplified IT Security Solutions Provider

**Zoho Marketing Automation, Zoho Social  
Zoho Sales and Zoho Analytics**

● **Project Duration:** 5 Month

● **Users:** 120

● **Project Scope:**

To implement Zoho's applications and to design customized modules that can help the Organization to build an appropriate workflow and manage their business activities adequately. The solution which is built will also govern the organization to analyze various reports and measure the performance. Additionally, integrating a system to automate Pre-Sales activities, Sales functions and Creating reports to analyze sales and revenue parameters.

## Problem Descriptions

The customer was looking for a robust system to effectively manage their leads, optimize the pre-sales activities and track user performance. The system needs to offer product configurations that can be used by multiple users and also provide territory management for leads. They also require a software that can create powerful dashboards and reports to help them monitor and analyze their performance.

## Solution Approach

Our solution experts wanted to implement a comprehensive lead management system that provides an automated process for approving and managing leads. This system utilizes the map dependency feature and lead address to ensure that the leads are assigned to the appropriate managers for maximum efficiency. Also, an automated solution is created to monitor the quote management system. At the selection of the customer's product categories and discounts, the approval process is triggered and the quotation is automatically created. This automation process significantly reduces the time it takes to create a quotation and allows the customers to save valuable time. To streamline, data analysis and report generation, we have made use of Zoho Analytics. It can efficiently develop meaningful dashboards that offer a comprehensive view of the business performance and help the organization in making data-driven decisions. We have also implemented Forecast Management, through which they can quickly view their progress toward sales targets and identify any potential discrepancies.

## Customer Experience

The thorough process of documenting the functional requirements based on the various workshops has helped the client to describe their requirements effectively and to ensure better clarity towards the solution architecture. The technical team submitted a technical design document and an appropriate solution was implemented successfully. The customer was glad to experience the timely closure of the project.

## Outcome

Appropriate software solutions were implemented constructively after analyzing all the user requirements. Implementing Zoho products has increased the overall effectiveness of the Organization's business process and the ability to manage their prioritized tasks with greater efficiency. Various modules were created to manage leads, pre-sales activities and approval configurations. With the effective implementation of applications to develop meaningful dashboards, the customer is able to track performance and make efficient data-directed decisions.

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