

Aerospace and Defense

Zoho Projects, Zoho Analytics & Zoho CRM

● **Project Duration:** 6 Month

● **Users:** 280

● **Project Scope:**

Implementing a software system that empowers the organization to manage leads, measure user performance, and automate the leads-to-opportunity management function. The system has also focused on streamlining the workflow and making it easier to track and analyze opportunities.

Problem Descriptions

To facilitate appropriate monitoring of individual and organizational sales performance, the customer was in need of a comprehensive system that would help them track individual performance and maintain a clear overview of organizational performance. Additionally, they also required an automated system for project management that helps them to keep track of project progress, measure results, compare performance against the targets, promote efficiency, improve collaboration, and overall streamline the process.

Solution Approach

In order to streamline and optimize the client's sales process we have implemented Zoho CRM which can be immensely beneficial for the client to monitor individual sales performance, optimize the lead-to-deal conversion rate and maximize the sales efficiency. It also provides them with a better understanding about the overall sales performance, enabling them to track and adjust their strategies as needed.

A complete project management tool has been implemented to make tracking and managing projects simpler and more efficient. It helps them to govern a wide range of project management features including milestones, task lists, issue tracking, profit and loss tracking, resource utilization based on a time log, all-in-one project management, resource grouping, and subtasks.

We have made effective use of Zoho Projects for task management and resource management needs. It will help them track project health, forecast project timelines and manage time logs which will efficiently increase their collaboration and visibility within the organization.

Customer Experience

The product that was built is highly efficient for customers to manage their timely business activities. The customer was glad to experience the timely closure of the project and the process of going live. The project timeline was met effectively with practical support post going live, which resulted in making our customers happy and adding more users.

Outcome

Everything that was expected was achieved efficiently at the client's convenience! And, they were able to monitor the performance at multiple degrees. At the organizational level, monitoring helps to keep data secure. At the managerial level, it provides an overview of every team's performance and numbers. And at the individual level, monitoring individual performance and tracking individual sales helps to boost their performance.

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