

**ORGANISATION PROVIDING ELECTRIC HEATERS TO ITS RESIDENTIAL AND CORPORATE CLIENTELE ACROSS AUSTRALIA****KEY HIGHLIGHTS**

Industry -
Electrical and Electronics

Project Duration -
Nine months

**SCOPE OF WORK**

- Enhancement of Zoho CRM and Campaigns
- Launch of Zoho Inventory
- Integration of Xero and Zoho

**SERVICE OFFERING**

Digital Transformation -
Enhancement of Zoho suite of operations across functions to increase efficiency in operations

CHALLENGES / REQUIREMENT

- Need for a Quote Creation process that provides a summary of the nature of heaters and related accessories required across a particular flooring
- Create an order management module for effective tracking in CRM
- Ensure adequate transfer of information between Xero and Zoho to ensure that inventory and finance systems are aligned
- Refine the manner in which campaigns are rolled out to existing and potential customers
- Develop a customer feedback survey rollout upon delivery and installation of heaters

OUR SOLUTION OFFERING

- Designed and developed the Inventory module in Zoho Effective integration with the Xero to ensure smooth flow of related data
- Developed the order management module to enable effective tracking of the order from the dispatch to the delivery and installation stage
- Developed a Quote Creation module in Zoho Creator enabling the calculation of price of heaters and related accessories through automation
- Integration of Zoho creator and Inventory module to enable effective inventory management and inventory forecasting
- Refined the Zoho Campaigns module to increase campaign effectiveness
- Developed a customer feedback survey which would be sent to the customers upon delivery and receipt of payment

IMPACT

- Instituted a strong order management mechanism to ensure that the order-to-cash process is seamless
- Effective integration of the CRM inventory and Finance systems
- Gathered regular feedback from Customers to gauge & increase customer satisfaction levels
- Reduced manual intervention in the Quotes Creation process by way of automation thereby increasing efficiency