



## ORGANIZATION OPERATING IN THE FINANCIAL SERVICES DOMAIN IN THE US , PROVIDING WEALTH MANAGEMENT SOLUTIONS TO ITS CLIENTELE



### KEY HIGHLIGHTS

**Industry** -  
Wealth Management

**Project Duration** -  
Phase I - Four months  
Phase II - Ongoing



### SCOPE OF WORK

- Adoption of Zoho One Suite
- Integration of CRM Vertical , Projects, Forms, Survey and Analytics



### SERVICE OFFERING

Zoho One Suite - Adoption and enhancement  
Creation of White Labeled Product for Financial Advisors to use

## CHALLENGES / REQUIREMENT

- Develop a white labeled product integrating various modules of Zoho so that wealth managers and financial advisors can adopt to grow their own business
- Utilize the Client's current operational model to develop the white labeled application
- Customize Zoho CRM vertical to meet the business requirements of wealth managers
- Define various subscriptions for the white labeled product

## OUR SOLUTION OFFERING

- Conducted a process walkthrough to gain an understanding of Client's current operations
- Developed an application integrating various modules in Zoho One suite that would serve as an integrated operating framework for similar businesses
- Customized the various modules within Zoho One and configured automation and enhancements to increase efficiency for the users
- Integrated third party applications such as Red Tail CRM to ensure effective campaign rollout and response management
- Developed forms using Zoho Forms to obtain customer information such as risk tolerance among others. Integrated Forms with CRM to record customer responses
- Created a series of reports using CRM and Analytics that would provide visibility to customer information to the users

## IMPACT

- Creation of a white labelled product that can generate additional revenue for the Client
- Customized operating framework that meets the needs of financial advisors
- Presence of report formats and templates that provide adequate visibility to its users
- Smooth flow of information from third party applications
- Usage of the product by the Client providing visibility to inherent gaps in the product thereby enabling continuous evolution and refinement of an application