

# CASE STUDY

## US Financial Services Business



BACKGROUND

CHALLENGE

SOLUTION

### Background

Our client is a financial services business offering consumers financial planning, general insurance, accounting and taxations services, with a team of 50 across the various departments.

### Challenge

Each department was operating in silo. This meant duplication of client data, lack of accuracy of data across the systems and they were unable to delegate work between departments efficiently. The business was unable to track it's key matrix efficiently. They were using 13 different softwares which were not integrated with each other such Redtail, e-Money, AMS, Billquick, Utratax, Box, etc. The business did not have a process to track their sales pipeline. The business did not have an easy way to issue and track invoices.

### Solution

We defined & identified 80 different processes, some of which was shared between different departments. We built a Zoho vertical CRM that would capture all the customer information among different departments in a user-friendly manner. We then integrated Zoho vertical projects and built all the workflows as Projects. This enabled the department heads to track resource utilisation, allocate work evenly across the teams and track the time spent for every process. We also enabled a client portal so that customers could view all the work being done by the business in real time, thus adding value and increasing transparency. We also integrated Zoho finance so that users were able to track invoices. We integrated reports so we were able to analyse and generate key matrix reports for the management. We customised the calendar to enable easy scheduling of appointments. We introduced the concept of opportunity so that the business was able to track the sales pipeline and forecast efficiently.

**ZOHO CRM ZOHO People ZOHO Projects ZOHO Finance**

