

Case Study



Spaghetti Agency

# Strike gold with Zoho One!



[zoho.com](https://zoho.com)



# The Company

No bull,  
**just beef.**

A decorative graphic consisting of a 10x10 grid of small squares. Two blue stars are positioned in the grid, one in the second row from the top and one in the third row from the top, both in the fifth column from the left.

Established in 2013, Spaghetti is a marketing agency based in Warwickshire that specialises in content creation, consultancy and training for businesses. Its venture just started with training, but the company has now grown to employ 10 team members to look after and manage client relationships. A lot of what the team does includes creating content for blogs, websites and email marketing as well as SEO and managing advertisement accounts for retained clients on a monthly basis. Spaghetti is an agency with a difference. Referring to the internet as the Wild West, its brand is built around this theme. It offers peace of mind to clients with an honest approach to marketing, which customers really value. Only tried and tested marketing methods that have been successfully used in-house make the cut. Hence the "**no bull, just beef**" slogan.

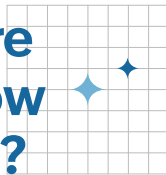
We spoke to Todd and Jo, Managing Directors (top cowboy and cowgirl) at Spaghetti Agency, to get the low-down on why they scrapped their collection of legacy applications in favour of Zoho One.

# The Challenge

Find a CRM system without limits that seamlessly integrates with other applications.



Before Zoho, it was very much the software dictating to us that **this is how things are done rather than how do you want to do it?**



## Todd and Jo

Managing Directors

Life before Zoho was limited. There were numerous applications being used, all containing lots of different information. Hardly any of them spoke to each other and the ones that did "were practically stuck together with sticky tape." This caused a lot of "digital arguments" explained Todd, making things that little more chaotic. This resulted in a lot of manual, repetitive work and duplication of unnecessary data.

One of the most troublesome platforms in Spaghetti's tech stack was its CRM solution, Capsule CRM. At the time, Capsule was favoured because of its integration with Freshbooks, Spaghetti's accounts package. Todd and Jo soon realised its limitations when they wanted to change simple things such as dashboards or make amendments to their pipeline. It was nearly impossible to do. After speaking with developers, who didn't really understand what they were after, they knew that what they had was too basic. They needed a more sophisticated, comprehensive CRM system that could scale and grow with the business.

Todd and Jo have encountered many CRM systems through their consultancy work over the years, with many not being to their liking. "With the bottom-end CRMs, they are all easy to use straight out of the box. However, you find that as soon as you want to do something specific, you can't" explained Todd.

Spaghetti was also using Zapier to link different applications together. These connections often needed mending as they would "constantly break", causing the team at Spaghetti to manually input data when it fell short.

Spaghetti then found Magnetar IT, a Zoho Affiliate. Todd and Jo explained their situation to Rafael, Director & Founder. They gave insights into their current setup in the business and the applications being used. Although impressed, Rafael knew it could be consolidated under one umbrella. "They wanted to bring everything under one roof rather than having multiple applications" explained Rafael. He knew that Zoho One would fit Spaghetti's biggest requirement and there was no better suite of tools out there for the job.

## Spaghetti's goals to strike gold in the digital landscape:

- ◆ To implement a CRM system that integrated seamlessly and reliably with other applications.
- ◆ To incorporate far more functionality and customisation that would scale and grow with the business.
- ◆ Create a central hub to store all client information, marketing communications, the sales pipeline and all processes.
- ◆ To combine as many processes as possible in one platform.

# The Solution

A bundle of applications offer baked-in scalability for CRM and beyond



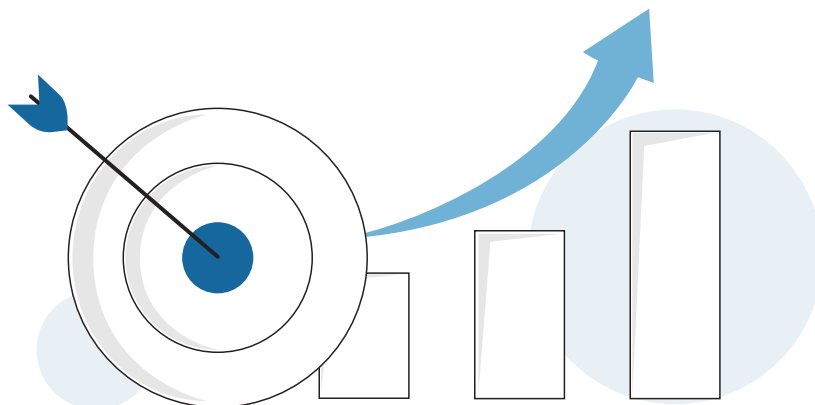
Zoho One was the obvious choice because of **its suite of applications.**



**Todd and Jo** - Managing Directors

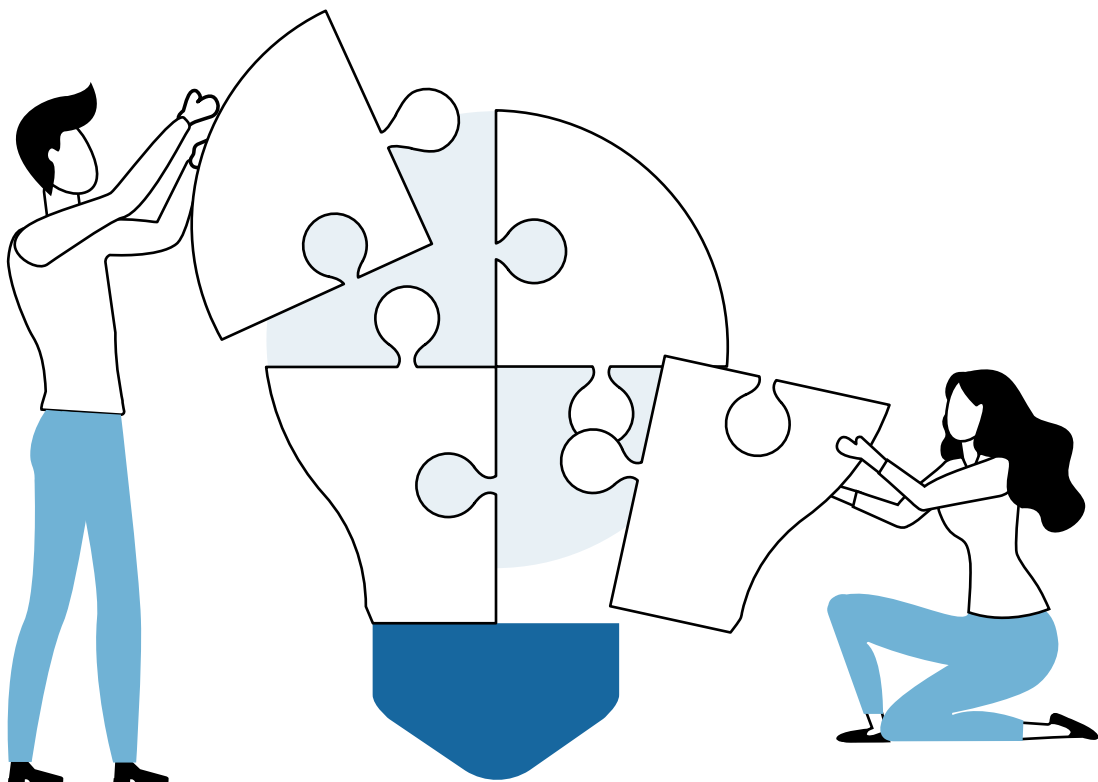
Spaghetti started by replacing its old, limited CRM with Zoho CRM. Together with Magnetar IT, it built an end-to-end solution to onboard clients, collect information and maintain communication. Zoho CRM now documents each stage of the customer journey. Every lead, email, call and proposal is displayed in a client's record thanks to Zoho's seamless integration with applications like Office 365 and the telephony provider Vonage. "I always wanted something to be the centre of our world and that's what Zoho CRM has done for us" explained Todd.

Insightful Kanban views have been set up with Spaghetti's brand in mind. These views give Spaghetti a clear overview of every opportunity in the pipeline. Colours have been used in tabs within the sales pipeline to match Spaghetti's branding and to mirror its team's ways of working. The whole sales process has now been replicated inside CRM. It works exactly how Spaghetti want it to rather than the CRM dictating how it should work - something its old CRM could not offer.



Spaghetti has also been able to integrate Zoho CRM with its proposal software, Better Proposals. Its new custom 'Create Proposal' button within the CRM allows team members to pull proposals into each opportunity. "This has solved one of our pain points. It means we will not forget to create proposals and we will not have to go looking for them" Todd goes on to say. Clever blueprints have been put in place so that proposals can only be obtained at a certain stage of the sales process. Alongside these blueprints, a collection of tasks have been automated to keep opportunities moving along the pipeline and free up team members' time.

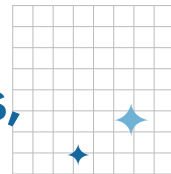
Spaghetti use Zoho Forms to capture lead information from channels such as website and email. Zoho Flow then acts as the middleman by inputting all of those details into the correct fields in CRM. Zoho Flow populates the lead source automatically so Spaghetti know exactly where they are coming from. Having this information pulled over is important for Spaghetti - it helps them to understand where leads are driven from and establishes which elements of the website persuade customers to enquire.



Comprehensive dashboards displaying all key metrics have been pulled over to CRM from Zoho Analytics. Spaghetti's "Home Managers" dashboard displays opportunities by lead source, amount created each month, amount closing each month as well as overdue and open cases. Different dashboards have been set up for other team members too, which only include information relevant to them.



**Zoho has saved us thousands,**  
it's definitely paid for itself and more.



**Todd and Jo** - Managing Directors

# A combo of Zoho applications at work

Alongside Zoho CRM, Forms and Flow, Spaghetti Agency has implemented many other applications from the Zoho One bundle to manage its processes, data and team members.



**Zoho Bookings:** Spaghetti Agency have implemented Zoho Bookings to create different services that run alongside its sales process. These help the team qualify clients and establish if they are the right fit. They channel customers to the right type of booking by embedding the booking link in an email. Specific booking links are shared based on the type of call and once selected by the customer, generate the appropriate Zoom meeting (another seamless integration). Parameters have been put in place so bookings can only be made within the timeframes set. Zoho Bookings also integrates with Office 365 which automatically reserves the slot in the correct calendar. "It's saved us a great deal of time and we no longer play what I call email tennis with available times and dates" explains Todd. "Were getting more calls now and my diary is super full." Spaghetti has also made sure all bookings are documented in the customer record in CRM so no touchpoint is missed.



**Zoho People:** Instead of notes and information being stored in various places, including an iPhone and Dropbox, Spaghetti now uses Zoho People to store colleague information, record equipment serial numbers and store employee contracts. Zoho People provides a complete overview of each employee, making sure this information is never accessed by unauthorised individuals. "It's so much easier to record the employee side of things now" says Jo. "I would definitely recommend Zoho People to HR Professionals. It's so easy to use and very flexible."







**Zoho Campaigns:** Spaghetti Agency has implemented Zoho Campaigns to build an automated onboarding email series and a range of branded newsletters. "It was important that everything integrated properly with our CRM. That's why we decided to go with the Campaigns option within Zoho" explains Jo. Emails sent are based on templates, making life easier at Spaghetti Agency. Clients also know what they are receiving each month, ensuring consistency throughout.

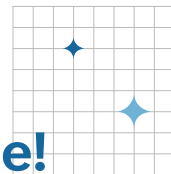


**Zoho SalesIQ:** Together with Magnetar IT, Spaghetti Agency brought SalesIQ into the mix. Adding SalesIQ to their website allows Spaghetti Agency to make changes based on actual analytical insights. The team can see which parts of the website work best based on where people interact the most. Since using SalesIQ, Spaghetti have seen an improvement in conversion rates.

## Magnetar IT - Zoho Affiliate



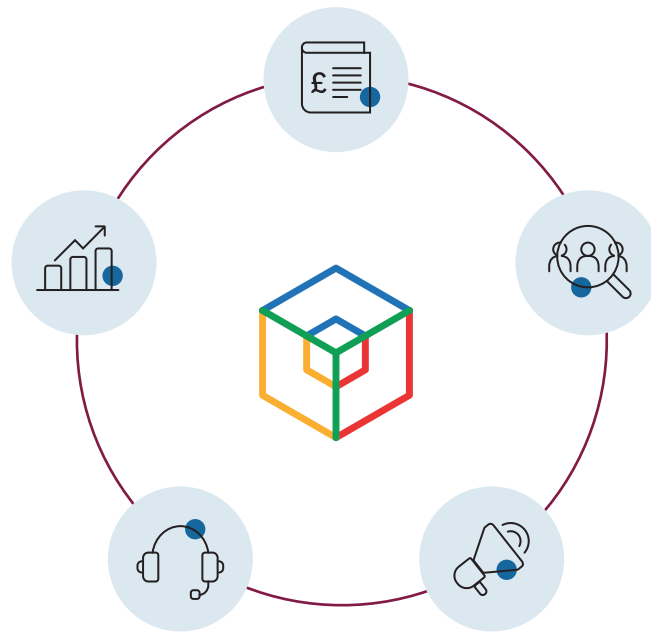
Having Magnetar IT as our partner in this **has been absolutely invaluable!**



**Jo** - Managing Director

Spaghetti Agency partnered with Magnetar IT, a Zoho Affiliate, to help them implement the Zoho system across their business. Rafael, Director & Founder, has been by Spaghetti's side from the very beginning and is always on hand if help is needed. He was responsible for the set up and integration of Zoho Flow plus other applications including CRM. "I don't think we'd have had the time or knowledge to have done it by ourselves" says Jo.

# About Zoho One:



Developed as the ultimate 'operating system for business', the Zoho One bundle is a collection of 55+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

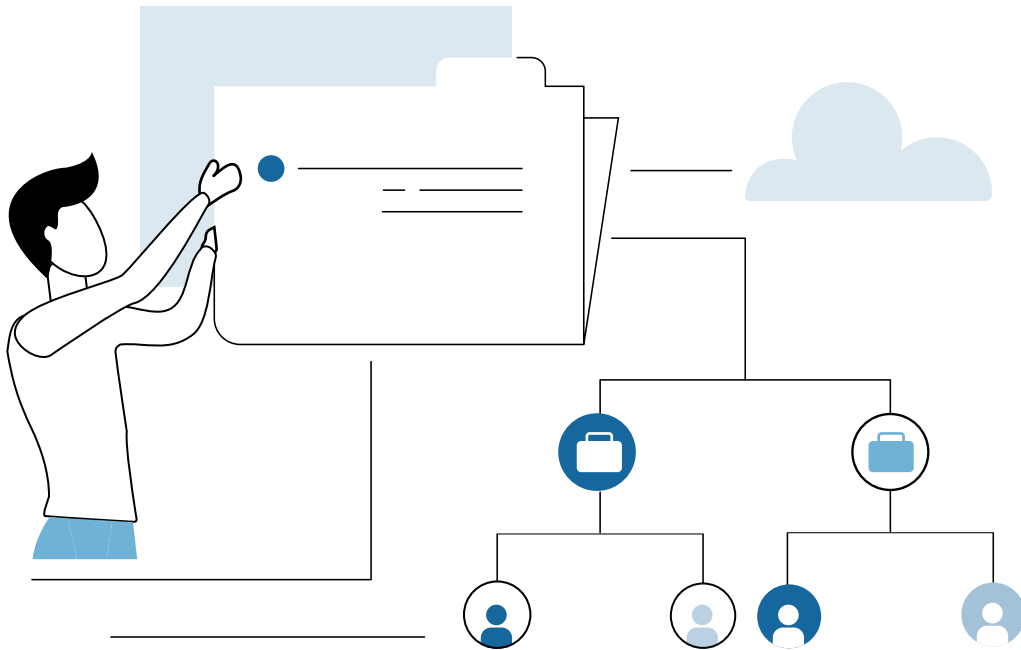
**Please find out more via our website: <https://www.zoho.com/one/>**

# About the Partner Programme:

We have a vast network of partners across the globe who are all experts in Zoho products. All of them are there to identify, manage and implement the right set of Zoho tools to address the unique needs of your business. Once implemented, they can provide direct training and support to help you make the most of your technology investment.

**Find and contact the right partner for you via our website:**

**<https://www.zoho.com/partners/find-partner.html>**



**Email us:**  
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zoho.com



Zoho One



CRM



Campaigns



People



Bookings



Flow



SalesIQ