



This has saved us
a great deal of time
and energy.

Pepperstone Financial increases overall efficiency with Zoho CRM

COMPANY PROFILE



INDUSTRY
Capital Marketing



TYPE
B2B



SIZE
51-200 employees

COMPANY CRM CRITERIA



API Integration



Email Marketing

Pepperstone Financial is an execution-only forex brokerage firm. The company provides access to fair, competitive, and transparent pricing across all major currency pairs by equipping traders with best-in-class trading technology and customer service. The company is based in Melbourne, Australia.

Challenges:

Pepperstone needed a way to reduce data entry, automate email marketing and lead tracking, and optimize conversions into live trading accounts. Their existing solutions meant capturing customer data and manually entering it into the CRM while also adding it to email lists. With Pepperstone's explosive growth, this would have been a full time job.

Solution:

Pepperstone's IT team was looking at several CRM solutions including Salesforce, Sugar-CRM and Zoho. They chose Zoho hands down for its extensive features, affordable pricing, and developer API documentation.

Pepperstone uses the Insert API method to integrate with Zoho and has been very pleased with the results. Pepperstone uses a cron job to schedule the creation of the API ticket every six days. Pepperstone has used PHP to parse the web form data into an XML string and create leads in Zoho CRM.

Results:

Owen Kerr, CEO of Pepperstone Financial, says, "this has saved us a great deal of time and energy in the processing of new customer applications. This is priceless to such a fast growing company. We have also used the Zoho Autoresponders to completely automate the marketing follow-up process, freeing up our sales team. The next stage of the development will be to integrate across Zoho Creator, CRM and our back office systems."



Zoho CRM is a cloud-based software for managing your customer relationship in a better way. It helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system. We are light on your pocket and the features and integrations we give you are unmatched.

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