

# Case Study

## The Business

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Company Name	<input type="text" value="Practical Systems Ltd"/>	
Address	<input type="text" value="Armidale"/>	
	<small>Suburb</small>	
Industry	<input type="text" value="Software"/>	<input type="button" value="▼"/>

## Executive Summary

Which Zoho apps have you implemented?



Zoho CRM



Zoho Desk



Zoho MarketingHub



Zoho Campaigns



Zoho Backstage



Zoho Inventory



Zoho Mail



Zoho Analytics



Zoho Books



Zoho Subscriptions



Zoho Sign



Zoho SalesIQ



Zoho People



Zoho Projects



Zoho Recruit



Zoho Workerly



Zoho Survey



Zoho WorkDrive



Zoho Bookings



Zoho Connect



Zoho Cliq



Zoho Assist

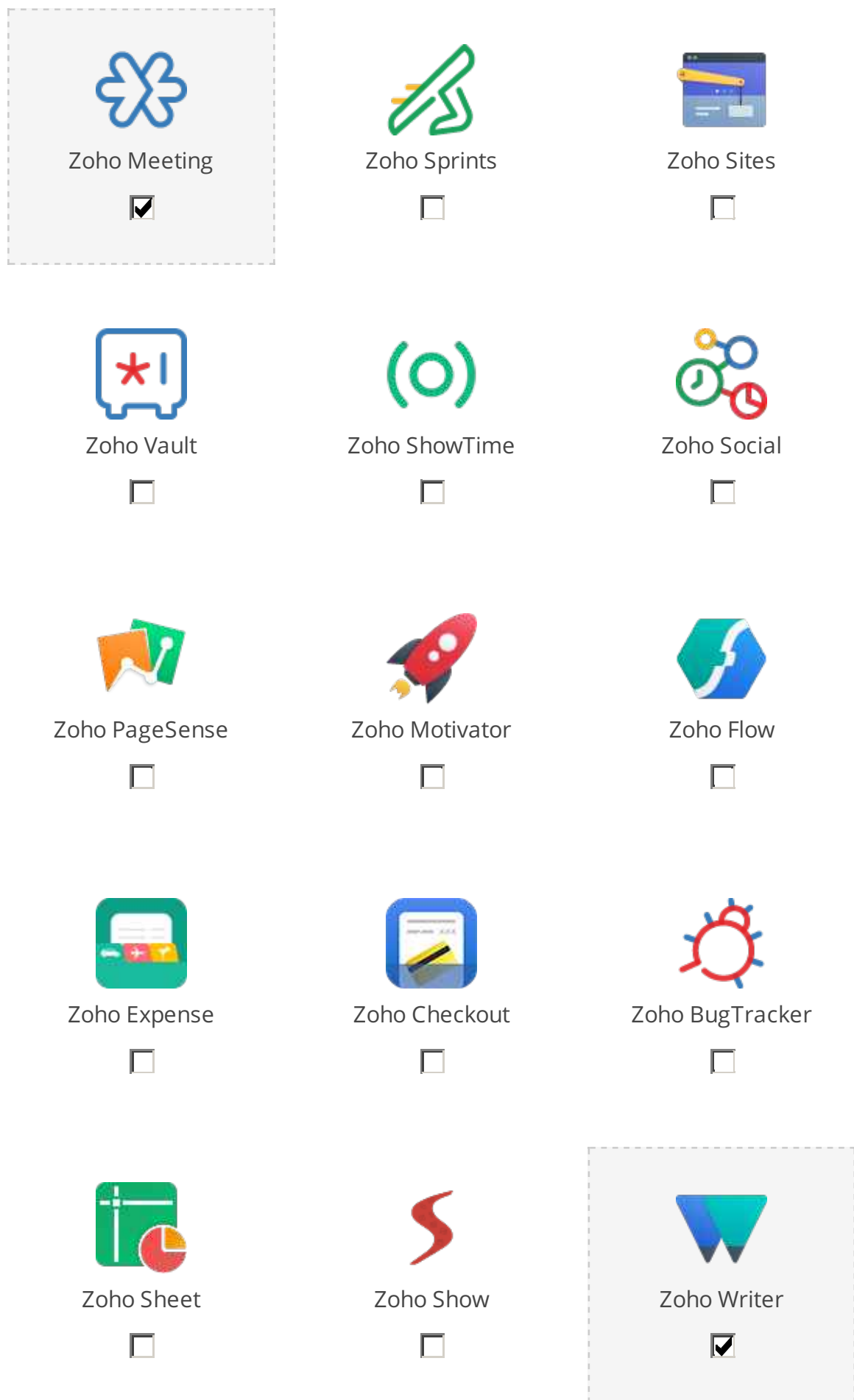


Zoho Commerce



Zoho Forms





How many Zoho users do you have?

33

Include a brief overview of the solution implemented

Practical Systems sought to update our CRM systems and processes taking the opportunity to consider better practice is integrating our customer facing processes as far as possible to one business process platform enabling us to shut down/save cost on dispersed legacy systems.

## Introduction

Briefly introduce your company and present the struggles/problems you were experiencing prior to finding Zoho & Connecting Teams.

Practical Systems has been in operation for 25 years and yet remains a small company. Our business processes had evolved rather than been designed and consequently had led us to using multiple systems across customer facing processes which required manual interventions to link leading to inefficiencies and potential for errors. In seeking to embark on growth it was recognised that our existing processes would not scale to support increased customer interaction without unsustainable investment in staff costs.

*End this section with an "open loop" that pushes the reader to continue reading to learn how the problem was exactly solved and why you chose Zoho & Connecting Teams.*

## The Challenge

Go into depth about the specific types of challenges the business was facing prior to implementing Zoho with Connecting Teams. Describe how those challenges were adversely affecting the business.

Our legacy CRM system had suffered from many years of evolution and changes to desired customer interaction without consideration of long term strategy for customer engagement. It was being used as a tactical mailing list. The database also did not provide for automation of processes. Accordingly our customer information was disorganised and customer interactions were subject to substantial and continuous manual interventions. Additionally, as a software company, we provide significant pre- and post-sale support to customers. All our interactions with customers from a Support perspective were handled in a separate system which was not integrated with our CRM, requiring support agents to navigate between two systems in order to manage and record customer support contacts. Further our financial management was also handled by a further stand alone system meaning that financial transactions could not be triggered directly from the conclusion of a sales interaction. This required manual intervention between sales closure and transactional engagement with the customer. These separations of our various systems created a number of pinch points for error, leakage or negative customer experience. The manual effort required to resolve issues took away from capacity to pro-actively managing improvements in customer relationship.

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## Finding A Solution

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Describe your search for a solution. How did you find Zoho & Connecting Teams? What was your selection criteria? What other options did you consider and why did you pick Zoho & Connecting Teams over the others?

We undertook a search to identify providers of CRM systems and technology. This included online search and prospecting of business contacts to gain recommendations. This identified a list of prospective CRM providers. Our secondary priority was to consider whether the provider also offered additional systems that could provide an integrated business process platform to address the challenge described above. In assessing the relevant solutions it became clear that Zoho was a strong candidate technically. Market feedback however suggested that implementation of Zoho without the support of a local implementation partner would be more difficult. Connecting Team were identified as the local implementation partner for Zoho. Connecting Teams rapidly engaged with us to identify our needs and recommend solutions and approaches to implementation. Their approach was very responsive and was aligned with our culture and approach to doing business. The decision came down to a choice of Salesforce versus Zoho/Connecting Teams. Our decision to go with Zoho/Connecting Teams was based on Zoho's extensive range of business process support that would enable integration of many of our processes into one Enterprise solution; cost efficiency and the responsiveness and relevant support provided by Connecting Teams.

*In this section, introduce Connecting Teams and how we assisted you and specifically describe the value we brought to the solution.*

## Implementation and Results

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How long did implementation take to get fully running?

We commenced implementation of Zoho CRM in May 2018 and while we have commenced implementation on a number of fronts we are yet to fully complete implementation and I believe that we will be continually implementing further Zoho applications over the next 2 years. We are now (April 2019) fully running with Zoho CRM.

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What were the results?

Even though we continue to implement Zoho applications progressively - so that we are not seeing full results as yet - we do see increased efficiency in our sales processes; improvement in business development pipeline management; shorter lead conversion; clarity of visibility on opportunity management and reduction in our sales cycle.

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Where is Zoho providing the most value?

So far, the most value has definitely been in sales process management, emerging benefits in customer experience through to purchase; coming improvements in managing our Support interactions with customers. In addition we have improved substantially the speed and quality of establishing eDM campaigns to our prospects and customers.

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How did Connecting Teams help with implementation?

Connecting Teams provided significant implementation support - recommendations on implementation strategy and management; recommendations on database migration; establishing templates and modules/fields in Zoho to support migration, recommendations on business processes, training of staff, trouble-shooting, issue reconciliation. Connecting Teams provided valued advice throughout the implementation journey and continue to provide advice on leveraging the range of functions that Zoho offers to add value to our business.

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How are the different parts of the business benefitting?

We are seeing better collaboration across the business especially between Sales and Support and also in the efficiency of our marketing activities. We will soon progress towards improved financial management and the capacity to link sales activity to a more integrated financial outlook for the business. Above all we are cutting the leakage in lead and opportunity management through better visibility of next steps in customer engagement and also automation of sales processes.

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Where do you see the business going and how will Zoho help you get there?

Practical Systems is planning to grow significantly over the next four years. Zoho places us well to have a business process platform that will scale up with our operations and support increasing engagement with a greater number of diverse customers while also enabling efficiency in our back-office processes and operations.

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## Testimonial

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Would you recommend us and what would you say about the value this solution has brought to your business?

I would recommend Zoho and Connecting Teams. As a smaller business, Practical Systems is exploiting the value of Zoho as a 'one-stop shop' business process platform. Connecting Teams has provided relevant and timely advice to help us get up and running and continue to expand the value that the Zoho platform provides.

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