

Case Study

# Ascent Solutions uses Zoho CRM to unify business activities

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## The company: Ascent Solutions Pte Ltd

Ascent Solutions Pte Ltd is an industrial IoT solution provider founded in 2010. As system integrators, Ascent has helped businesses across the world attain accountability and traceability over valuable cargoes in the forms of assets, persons, and vehicles. Having worked with businesses from financial institutes, supply chain, logistics, and construction, Ascent's multi-faceted services encompasses tracing fleets, security, assets, and inventories across the globe.

For such diverse offerings, Ascent had to leverage different digital tools to maintain full visibility of their services and products, all while ensuring their customers are serviced according to a standard guideline.

Daniel Chan, Director of Professional Services, ensures the gaps in such processes are narrowed. Besides overseeing customer success, he has helped Ascent understand the value of a highly integrable CRM solution for managing customer activities, and in curating a more systematic and trackable way of preparing customer documents.

With Zoho CRM, Ascent also quickly recognised the integration opportunities with other important solutions that can help achieve a more agile way of work.

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## The challenges at Ascent

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- ◆ Traditional and manual methods for sales data entry, resulting in a lack of standardised sales procedures.
- ◆ A lack of real-time data leading to intra-company communication gaps.
- ◆ Poor visibility of pipeline progress.
- ◆ Team decision-making based on gut feelings.
- ◆ Siloed solutions being used for daily operations and communication.

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## ***Tracking down the problem - Standardisation issues and disparate data***

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Before Zoho CRM, the majority of the staff at Ascent were still generating quotations on Excel spreadsheet given its flexibility with drafting terms and conditions. Since the process was manual, information was curated and processed in a siloed and stove-piped manner making intra-company communications difficult, and record-keeping errors common. This system didn't allow them to fully see how a lead is converted into a deal.

With such evident information gaps between the project management members, field service engineers, sales, and business development teams, pipeline tracking was almost invisible without a standardised way of documenting and reviewing data.

**" We needed a central repository of all customer leads, contacts, accounts, deals, the product master, and price books. "**

— Daniel Chan, Director of Professional Services, Ascent Solutions




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## ***First introduction to Zoho CRM***

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Ascent, however, was not entirely new to the idea of a CRM. The team had previously use a free version of HubSpot CRM which let them perform proper data collection and present visible pipelines to senior management. Nonetheless, when the business scaled, the team quickly realised the need for an integrable CRM.

It took Ascent more than a year to find a suitable CRM solution after rounds of internet research and testing several SaaS products. Together, with the assistance of Singapore-based partner, Zolutions, Ascent was able to leverage a PSG grant to purchase new licenses for Zoho CRM. There is now more visibility of leads, contacts, accounts, and even quotations.

A large red graphic with a torn paper edge, pinned to the top right with a blue pushpin. It contains a quote and a portrait of Daniel Chan.

**“ The sales team decided to go with Zoho CRM after extensive market research. It has value for the money; the PSG grant helped a lot, too. Our requirements were simple: To have an affordable CRM software used for a centralised repository of all customer information, product master, and price books. It's integrable nature with other Zoho apps stood out, too! ”**

— Daniel Chan,  
Director of Professional Services, Ascent Solutions



## The solution: How clearer pipeline management started it all

At Ascent, the conventional sales process required the sales and business development team to secure a deal, which will then be assigned to the professional services and customer support team, before eventually hopping off the customer success cycle. To ensure a frictionless hand-over, the team needed to develop pipeline visibility for subsequent teams that come after to have a more accurate followup on customer servicing activities.

Today, both the sales and business development teams operate in unison across two separate pipelines, without missing important visibility of their own version of the sales processes.



A red, torn-edge paper graphic with a blue pushpin in the top right corner. The text is written in white, bold, sans-serif font.

**" We've found immense value with using the vanilla version of Pipeline in CRM. Ascent started with nothing, but with Zoho CRM, we were already given a proper gold standard for use. The sales team is currently very comfortable and efficient with the standard version of it. "**

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## ***Systematisation of quotation and discount approval process***

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As the sales team helps sell the company's fast-moving consumer goods, they can operate within a more standardised environment in the associated product master. This simplifies the process of generating personalised quotations for customers.

With the *Quotations* sub-module in Zoho CRM, Ascent has now mandated the process of first setting up a product master, and prices in the price book before generating a quotation. Once a price is fixed, directors can approve discounts. Today, there is a more systematic way of producing quotes that varies across prices and countries. Quotations now have a more professional cosmetic look, contain all necessary information, and are free of human errors, while every document is tagged with an auto-generated serial number. In this way, agents no longer need to repeatedly key in the description of every line item as it resides in the product Master.

While Zoho CRM is used in tandem with ARIS, an in-house ERP system, its external integration with QuickBooks Online helps communicate that information to the accounting platform, where the delivery orders are generated and signed before finally issuing an invoice. Upon deal closure, the status is marked as "closed won" in Zoho CRM.

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## ***Other Zoho integrations for real-time lead capturing***

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As important as it is to maintain relationships with existing customers, the integration of tools that was set up at Ascent has enabled its sales team to seamlessly manage incoming sales prospects they are receiving from online sources.

The integration between Zoho CRM and Zoho SalesIQ, a live chat agent, allows Ascent to free up more bandwidth for other customer-facing activities, and even look into other offline avenues where leads are coming in. With every web visitor, Zobot in Zoho SalesIQ can simultaneously engage the visitor and qualify them with proper grading in place, while avoiding spam. For this, Chan and the Ascent team set up a sophisticated automation process where scoring passed a certain grade can help add more quality leads into the CRM.

By combining integration and automation, the team now has sufficient knowledge on the interest level of prospects, where nurturing activities can be performed with more efficiency.

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## ***Seamless creation of custom projects***

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Upon a deal closure, the agent will create and manually map a new project in the CRM. This action creates a new project opening for the professional services team, eventually notifying Ascent's project director, as well as other key decision makers of a new entry in the project pipeline. This real-time notification to start the project is performed through workflow automation.

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## ***Customer experience at scale with other Zoho integrations***

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The integration of Zoho Desk and Zoho CRM provides Ascent with a more streamlined perspective of their customer enquiries, while keeping a record of all communications across the different platforms used. This helps the sales and BD teams at Ascent have complete visibility and situational awareness around any raised tickets that might potentially reflect growing customer dissatisfaction. Account management and other customer-facing teams now have a better situational picture on the tickets that were coming in through Zoho Desk with a more accurate single source of truth.

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## ***Zoho CRM & Ascent's in-house integration***

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Ascent is currently working on their aforementioned in-house ERP system, called ARIS, which stands for Ascent Resource Information System. Given its complex business operation model that has to do with tracking of subscription plans, and SIM card activations, Ascent had to use Zoho CRM and ARIS in tandem. With every IoT device issued, the services usually comes with a SIM card subscription, as Ascent is also a tier-two telecom through its fully owned subsidiary known as Borderless Hub. This requires onboarding and tying activations or deactivations to a billing mechanism which is highly complex. This means the team also has to rely on applications outside of Zoho instead of solely on a CRM.

Chan and his team had to engage a third-party system integrator company based in Malaysia, who is also familiar with Zoho CRM. Using Zoho Flow, they were able to create an API connection between ARIS and Zoho CRM.



With the roll out of ARIS, the Ascent team hopes to eventually unify the product master, supplier master, inventory master, and prices books into a centralised repository that is hosted on-premise by Ascent. The relevant data will eventually be pushed to Zoho CRM for facilitating sales operations.

In the meantime, customer-facing activities will still be performed on Zoho CRM. The team also has intention of integrating Zoho Campaigns to help with marketing activities.



Daniel Chan, Director of Professional Services, Ascent Solutions at the HASH Innovation Asia Summit 2023 sharing his view on the importance of cybersecurity for SMEs. Hashtaq (organiser) is also a Zoho customer.

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## ***Supervised access to manage customer data privacy in CRM***

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In Zoho CRM, key roles such as Directors generally have administrator access. By implementing a user hierarchy role, Chan can limit the visibility and access level of data to specific departments.

For staff levels, such as executives and managers, data exportation and deletion of records are strictly limited. This has also deterred corporate espionage, where—in worst case scenarios—an employee who has left the organisation decides to run an exportation of data and its lists for their own use. With the native administrative set up in CRM, alongside further configurations, protecting corporate and customer data now has a stringent process.

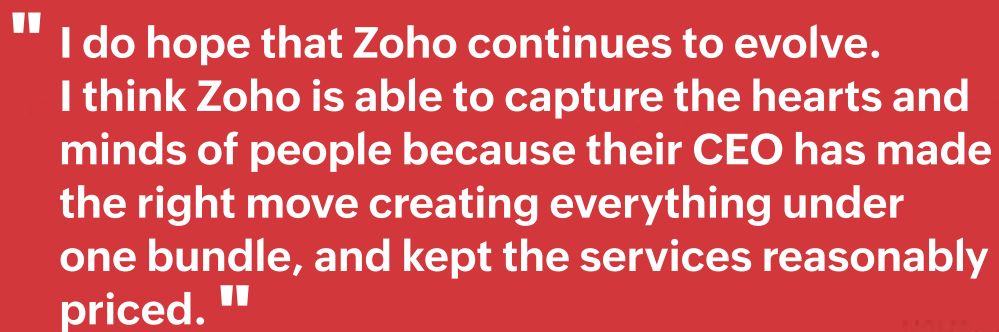
### **Benefits and ROI**

The main benefit that Ascent has experienced since integrating Zoho CRM with their current systems is improved response time to customers. According to Chan, it generally took 3-13 days to respond to customers. With their new systems in place, their response time is now anywhere between half a day to three days max.

### **Looking forward**

Beyond a CRM, the teams at Ascent have also been using a multitude of other Zoho solutions. They eventually look forward to leveraging solutions catered to the enterprise as a whole. While Chan has been championing Zoho's technology at Ascent, another favourite feature that he hopes to have more adoption of would be the analytical and reporting tools. Being one of the few who utilises it to review sales KPIs, his presentation to the senior management was significantly easier because of this.

The company will continue to see expansion into their DTW digital twin warehouse project where they use computer vision to supplement their core IoT product range. Ascent is also currently trying to penetrate the healthcare sector to provide help in tracking expensive equipment for more visibility and traceability.

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**" I do hope that Zoho continues to evolve. I think Zoho is able to capture the hearts and minds of people because their CEO has made the right move creating everything under one bundle, and kept the services reasonably priced. "**