

Case Study:

ATM2Go – Automatic Teller Machine Services

Business Summary:

ATM2GO has been providing the convenience of cash to events and businesses since 2011.

When Andrew and Jenny first launched the business, it was with a wealth of industry knowledge. Andrew had been involved with selling the first 'white label' (non-bank) ATMs in Australia in the late 1990s.

Franchising was the obvious way to expand the business, so that individual business owners could own and operate their own equipment under the one brand. With 17 franchisees now running under the ATM2GO banner, the number of events that ATM2GO has attended over the last eight years is in the thousands.

There is a great deal of experience in the team and each franchisee takes pride in providing clients with an exceptional customer service experience. This, coupled with reliable machinery, has seen the business grow from strength to strength.

Challenge:

Previously using spreadsheets and individual CRM systems ATM2Go started searching for something that could handle all their applications in one - fleet administration, event management, franchise details, contracts and all communication records for their fast-growing service business. A system that all franchisees could use easily and with only one subscription fee.

Solution:

We booked a whiteboarding session with IWT Consulting to go through our process flow and Zoho One was highlighted as the answer we had been searching for.

Utilising the Zoho CRM system by customising and creating new modules, together we produced systems that 'talk' to each other. All data is accessible in the one application and is synchronised in real time so whether you're in the office or utilising the mobile app this makes working onsite easy. Great for a business that is expanding throughout Australia.

Financial aspects of each franchisee are regularly communicated with reports and functions that were coded to enable all parties access to these details as required, giving away with the old spreadsheets and manual data entry and reducing the risk of human error substantially. Individual machine data is regularly imported and allocated to each machine. Which is also linked to the event the machine was used at (including contact details, dates and maps) and the franchisee responsible for that machine with the dates added to the zoho calendar.

Permissions were set for franchisees to access their own data with administration profiles able to have an overview of the business as a whole. As a franchise business, Zoho has provided them with the ability to track when contracts are due to be renewed and set automated workflows for contact to be made either by phone or email.

Being able to see the entire business in one system is so efficient and cost effective. ATM2Go now utilise the CRM system to track and correlate their fleet of ATMs and franchisees. All communications are easily tracked to each client with details of 'behaviours' such as when emails were opened and read.

Working as a team with IWT Consulting we analysed the current business processes and by customising fields, modules and workflows within Zoho, provided systems that were above our expectations. Systems testing and training was set to suit what we needed to learn so again, all customised to suit the users.

We will save \$25,000 to \$30,000 in the first year with the elimination of double handling and manually gathering statistics for individual events. The ongoing time savings and the value that it adds to each franchisees business is massive!

Implementation

After we had settled on our processes and made the decision to proceed, we were up and running in 2 months! With the follow up support plan, any concerns are addressed asap. We will be utilising more applications as we continue to grow and improve ATM2Go, we know that IWT Consulting and Zoho have the ability to help us get to where we want to be.

IWT Consulting & Zoho

IWT Consulting is a team of business consulting experts that promote, support, train and customise a wide range of Zoho products including CRM, Campaigns, Surveys, web Sites, help Desk, Reporting & Analytics, HR Recruit, Social marketing and Projects, to mention just a few. Their unbelievable suite of products offers full functionality and an unbeatable price. As an Advanced Zoho Partner, IWT Consulting has proven to be not only knowledgeable about a wide range of these products, but able to understand and implement complex customer requirements.

