



Zohotizing IDT's
Business:

**A Unified Ecosystem
for Seamless
Operations**



Zoho
CRM

Overview

NRS unifies over 35,000 independent convenience stores, distributors, and inside and online sales channels on a single platform, enabling them to streamline their operations and enhance customer experiences.



The company

In the fast-changing world of retail, brick-and-mortar stores had a tough time competing with their online counterparts. Recognizing the urgent need to bridge this gap, [National Retail Solutions \(NRS\)](#) was established in 2016. NRS, a company specializing in Point of Sale (POS) systems and credit card processing for independent convenience stores, is a subsidiary of [IDT](#), a global telecom company established in 1994. Their mission was to revolutionize how traditional retailers operate by leveraging the power of modern technology.





NRS evolved from IDT's business model, aiming to provide technology to stores that sold IDT's telecom products. Building upon IDT's technological expertise, NRS developed a robust yet user-friendly POS register that includes features like credit card processing, e-commerce solutions, inventory management, loyalty programs, and reporting and analytics.

In addition to NRS, IDT also oversees [Boss Money](#), a remittance business. With an extensive network of over 50,000 stores spanning across the United States and Canada, IDT has created an integrated ecosystem where all its products seamlessly connect. IDT sees substantial growth, generating \$50,000,000 in monthly sales of telecom products, while NRS achieves an impressive monthly growth rate of 20%. IDT also has seven additional branches across the United States that also act as distribution channels. This comprehensive approach showcases IDT's vision of transforming retail technology and telecommunications.

In this case study, we'll delve into their journey, exploring how they harnessed Zoho CRM to scale their business and help small and mid-sized businesses stand strong in the digital age.

The challenge

Unlocking success: The thorough evaluation journey that led to Zoho CRM

Previously, NRS managed their business processes using legacy applications such as Google Sheets and Google Docs. These tools demanded extensive manual work, leading to inaccurate reporting. As the company expanded, the challenges of managing and tracking data in these spreadsheets became increasingly inefficient. It became evident that in order to scale and improve operations, the adoption of a CRM system was absolutely essential.

NRS initially explored Salesforce, investing substantial amounts of time and money in its implementation. However, after a year of using Salesforce, Rene Selemi, Director at IDT and the team realized that it wasn't delivering the desired results. It was at this point that they opted to explore the potential of Zoho.

Then, Zoho came along, and the transition was remarkably quick and straightforward. Although we needed some customizations and tweaks, overall, it was a very user-friendly and hands-on experience. The success we achieved with Zoho in our NRS department caught the attention of our entire company (IDT), and gradually, more teams started adopting it. Now, it's used across the organization. I'm proud to say that the success story began with NRS.



Rene Selemi,
Vice President of Operations, IDT



The decision to transition to Zoho was motivated by several key factors:

- 1. Ease of implementation:** Transitioning to a new system can be a complex process, and NRS needed a solution that offered a smooth and straightforward implementation.
- 2. Ease of use/User-friendliness:** The effectiveness of a tool is determined by how easily and effectively it is embraced by its users. And that's what NRS wanted. A system that had a user-friendly interface and made it accessible to all team members, ensuring smooth adoption.
- 3. Integration capabilities:** Seamless data exchange between essential business applications was vital for NRS. They needed a CRM that could keep a comprehensive record of all customer engagements while integrating with other systems seamlessly.

Rene explains,

It was critical because, with some other CRM products we considered, the integration and implementation were painful and required a lot of work and resources that we didn't have at the time. Your pre-built integrations and solutions made our decision to go with Zoho much easier and made our work a lot easier too.

4. Scalability: Recognizing the potential for growth, the team sought a solution that could scale with the business. Starting with just a few user licenses, NRS has since expanded to over 1000 users, highlighting the scalability of Zoho CRM.

5. Data security: Protecting sensitive data was a top priority for NRS. Zoho CRM's robust security features provided the peace of mind they needed.

The solution

Leveraging automation for smarter sales and faster growth

Through Zoho CRM, NRS has streamlined sales processes, covering everything from lead generation and opportunity management to order creation, order fulfillment, customer service, and reporting.

Leads are efficiently captured via a [Zoho Creator](#) application form that seamlessly transfers data into their internal billing system. Applications from prospects may enter the system via web forms on their website, or a salesperson may fill in the application after a field visit. Depending on the request type, such as a POS system or credit card processor inquiry, leads are automatically routed to the appropriate sales teams. This automated process significantly reduces the manual workload that was previously managed in spreadsheets.

Once leads are assigned to the respective sales teams, they are then further distributed among individual salespersons in a fair manner through a round-robin system.

The sales team conducts follow-ups with prospects by utilizing the integration between Zoho CRM and Five9, a telephony system. After successful communication, prospects move along in the sales pipeline, with the sales team scheduling product demos through the integration between Zoho CRM and [Zoho Bookings](#).



Following the product demo, sales personnel gather essential information through an additional form completed by the merchant. Once this registration form is reviewed and approved, the leads are then pushed into Zoho CRM before proceeding with deployment, after which the details are sent to the warehouse for further action.

Integrating and streamline various facets of the business

NRS's primary requirement was a comprehensive CRM solution: to unite all aspects of their business, including sales, operations, and service. This is precisely what Zoho CRM accomplished.

The integration of Zoho CRM with their inventory management system and internal billing system is seamless. After the registration form undergoes review, it is effortlessly transitioned to the operations team for further processing.

The company uses FedEx and SPL integration to manage shipping. This integration provides shipping clerks access to orders in Zoho CRM through portals making the process more efficient. Once the product is prepared and packaged, it automatically generates a label through Zoho CRM. As the package is dispatched, customers receive an email via Gmail-Zoho CRM integration.

This email includes information like the number of units shipped, the tracking number, other order-related specifics, and a calendar link. This calendar link allows customers to schedule a POS installation demo.

Maximizing success by keeping customers at the core

NRS places a strong emphasis on providing top-notch customer service. Using [Zoho Sign](#) integration, NRS is able to streamline and digitize the signing process. This ensures a more efficient and automated workflow, especially in handling agreements and contracts associated with customer transactions.



Leveraging the integration of [Zoho Desk](#) and Zoho CRM, the company efficiently manages all post-sales interactions. Customers can easily get in touch with the company via email, phone call, SMS (using Twilio integration) or live chat, initiating the creation of a support ticket in Zoho Desk. These tickets are then automatically assigned to support agents in rotation. Within Zoho Desk, the teams are divided into multiple tiers, which can be utilized to escalate tickets when necessary.

By leveraging [Zia](#), Zoho's AI assistant, the company further simplifies customer service through relevant answer suggestions and guided troubleshooting, resulting in faster and more accurate resolutions.

After the support agents resolve and close the tickets, a bot initiates a call with the customer to inquire about their experience and whether their concern was effectively addressed. Additionally, customers are invited to participate in a satisfaction survey. The ratings provided by customers play a role in determining agent compensation. This approach has led to improved employee retention and increased customer satisfaction.

Enhancing the customer experience and expanding the NRS community

But remember, we also have customers, and we want to make sure that when they call, they have a seamless experience as well. Zoho has helped us provide that experience to our customers, ensuring that their concerns are properly addressed, promptly managed, and responded to. Effective communication, especially through mobile channels, is key to our success.



Elie Y. Katz,
President & CEO, National Retail Solutions



The company also successfully runs a referral program on Zoho CRM where happy customers can refer a friend. NRS gets a tremendous amount of referrals through their current customer base who fill out a form on their website to refer a friend. This form adds referrals as leads into Zoho CRM who then enter the sales process. As a token of gratitude customers referring are then given a bonus gift card.

Additionally, the company uses Zoho CRM to effectively manage and track their distributors. The company utilizes third-party or independent distributors who are overseen by channel sales managers. These managers are responsible for recruiting and contracting independent distributors to sell the company's products. Each channel sales manager has a list of distributors within Zoho, where they handle communication, emails, campaigns, and issue resolution. Currently, there is a project in progress to provide distributors with direct access to Zoho, allowing them to manage their own accounts. While this feature is not fully implemented, distributors currently have access to a portal for downloading applications.

Unifying the entire business ecosystem under Zoho

IDT has successfully integrated its entire business ecosystem into Zoho, including NRS, the telecom division, and the remittance business (Boss Revolution). The onboarding and application approval processes are standardized across all divisions. However, in the remittance business, there are additional steps due to the nature of the operation. Lead generation sources include existing store relationships and walk-ins, and the main application process is handled in Zoho CRM. The application undergoes checks within Zoho before moving to a different platform managing the product. In the case of money transfer, compliance is crucial. Customers seeking to use the service go through a compliance review, followed by a credit extension process, which includes Zoho for approval. Once approved, a bank settlement account is created, enabling customers to deposit money for remittance. Customer service for all three segments is efficiently managed in Zoho, following the success experienced with NRS.

Improving operational efficiency and revenue through powerful analytics

Elie Katz says,

As our company expanded, we needed a CRM system that could grow with us, and that's precisely what we found in Zoho. It not only proved to be highly user-friendly but also budget-friendly. Zoho seamlessly accommodated our increasing license requirements and evolving needs. Whenever we identified a missing piece or sought to systematize a new aspect of our business, Zoho was there to support us.

Business intelligence and analytics are fully integrated into NRS's business processes. Using [Zoho Analytics](#), they are able to generate and analyze data, utilizing it efficiently to make informed decisions. Zoho serves as the platform where they input and retrieve the specific information they require from customers, streamlining data management processes effectively.

Improving internal collaboration

The integration between Zoho CRM and [Zoho Cliq](#) streamlines internal communication and task management by connecting operational workflows directly to the company's messaging platform. Users can receive real-time notifications in Cliq for task assignments, updates, and reminders originating from the CRM, ensuring nothing is missed and actions are taken promptly. Teams can also broadcast important messages, announcements, or process updates across channels to keep all stakeholders aligned. This integration reduces reliance on email, accelerates response times, and supports a more coordinated and efficient work environment.

Strengthening performance with enterprise support

Enterprise support has been essential to sustaining rapid development, resolving issues quickly, and advancing key product enhancements. The team receives real-time updates, direct access to experts, and consistent collaboration with product managers, allowing feature requests and improvement ideas to be evaluated and often brought into production. This level of support not only accelerates problem resolution but also strengthens the partnership—and ensures Zoho CRM's adoption continues to improve in ways that enhance user experience and operational efficiency.

Benefits

Rene says,

The implementation process was easy, and we worked with some very good people from your side right from the start. They truly understood our goals and had a hands-on approach, guiding us every step of the way. Despite my previous experience with Salesforce and similar tools, our team was limited in size, which made the assistance from your team, crucial. They not only helped us with the initial implementation but also supported us in extending Zoho's use throughout our entire organization. This early support made the process for everyone involved much easier.



Enhanced operational efficiency and better retail execution:

In the fiscal year of 2024, IDT achieved seamless cross-departmental collaboration and eliminated manual processes with Zoho CRM.



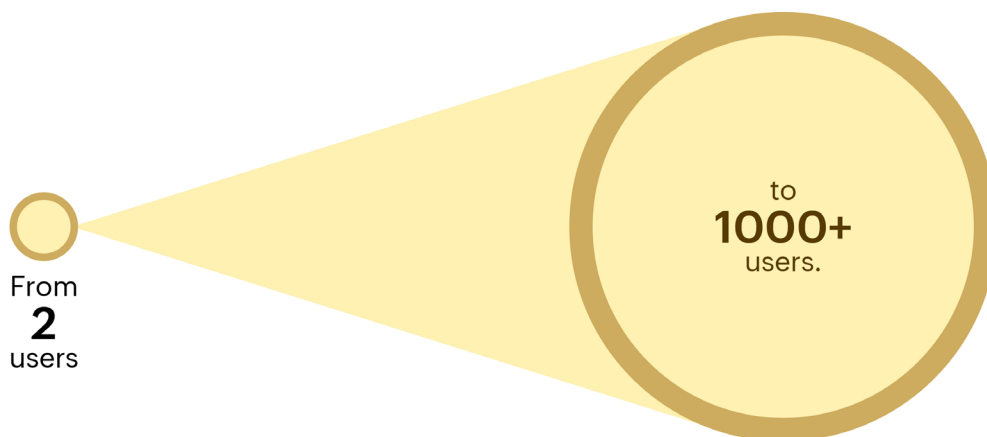
Stronger remittance operations:

The company also streamlined high-volume financial workflows and reduced manual intervention, ensuring faster, more accurate handling of remittance activities.



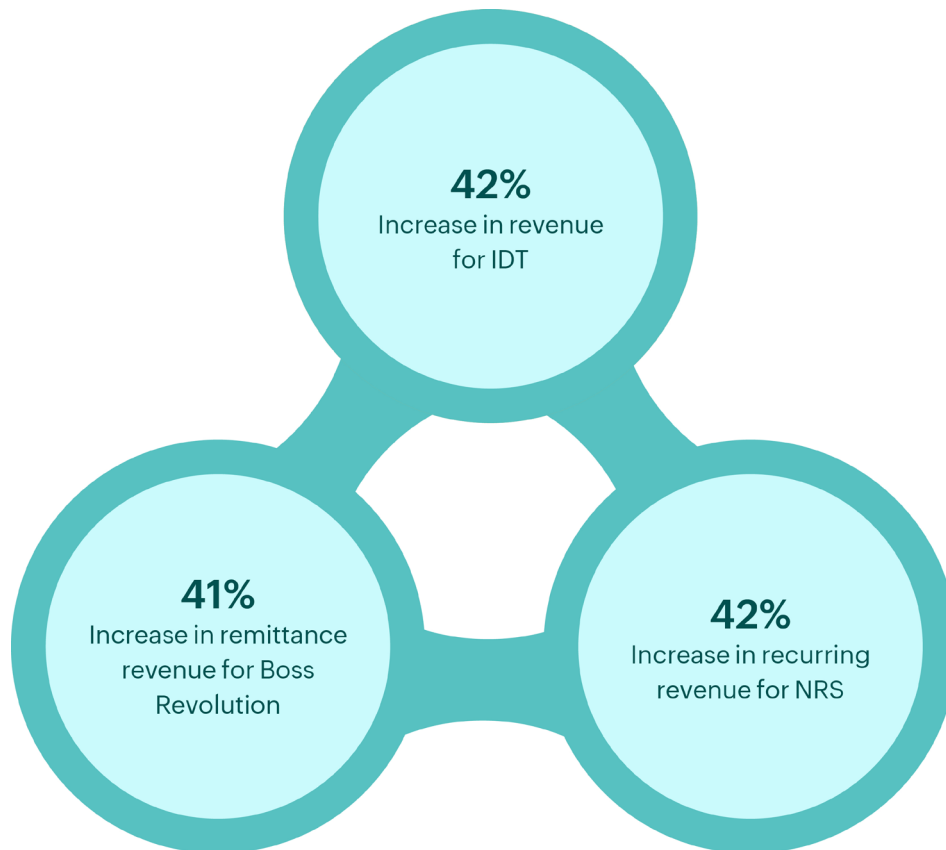
Rene says,

I'm glad that you've been able to witness our growth and the scaling up of our user base. We rely on your team to support all the functionalities we wish to implement so that we can offer our users a better service and a better product.



“Implementing a system or application that optimizes data processes and enhances overall efficiencies can have a massive impact on business operations.” says Rene. “It improves workflow, saves time, and ensures that customers are served more effectively, leading to better customer service and faster responses. When you can streamline order processing and enhance these aspects, it automatically translates into increased revenue, improved profitability, and overall cost savings for a company.”

The benefits translated into impressive financial results in Q4, FY2024:



At the core of NRS's operations, Zoho CRM acts as the central unifying hub. It brings together fragmented pieces of their ecosystem, streamlining operations across Zoho and third-party applications. This transformation has enhanced organizational efficiency and accountability and fostered business expansion. This consolidation saves time, improves accuracy, and has increased overall productivity by up to six times each month.

"As a result, our customer reviews have significantly improved, thanks to Zoho's contribution", says Elie Y. Katz.



Looking forward

“I want to Zohotize everything. The goal here is to create efficiency,” says Rene. Zoho and its integrations have already improved numerous aspects, and moving forward, the team aims to take it to the next level. Current efforts include enhancing the mobile version for the field sales team and optimizing tablet usage for the 150 on-street representatives. “With a company that’s growing and a vision centered around NRS, there are limitless opportunities for implementing new processes and providing various products,” indicating a promising journey ahead.