How advanced KPI analytics and forecasting in Zoho Analytics helped SMSI Group improve employee morale and increase sales by 20%

SMSI

www.smsi.group

About SMSI Group

SMSI Group was founded in 1989 in Springfield, MO as Springfield Mechanical Services. They provide turn-key facility solutions for commercial and industrial premises by offering a single destination for design, repair, mechanical, and electrical services for all types of buildings, from convenience stores to industrial manufacturing plants. From four branch offices in Missouri, Arkansas, and Oklahoma, SMSI Group offers nationwide service.

Solution summary

SMSI had outgrown using spreadsheets for data analysis and needed a more sophisticated solution with native mobile access. Implementing Zoho Analytics enabled them to configure KPI dashboards for management and use forecasting to set more realistic targets and improve productivity, morale, and sales.

> *We are now able to consistently close 20% more sales every year because of reliable forecasting.*

Brad Fisher,
VP, SMSI Group

20% increase in sales year-on-year

4–5 hrs for data analysis reduced to **15 mins**

Dramatic improvement in **productivity and morale**

The Challenge

SMSI had been using Microsoft Excel spreadsheets for data analysis, but as the company scaled and generated increasing volumes of data, this was becoming unwieldy and concerns about data security emerged. Meanwhile, the sales teams were rarely hitting their targets and the existing data reporting wasn't showing why. Other data black holes existed, making it difficult to accurately track the exact overhead of each job. Vice President Brad Fisher realized that they would need an end-to-end BI solution that could integrate data from all their systems to allow them to more easily track KPIs and generate deeper insights into the business.

> ## "
> *As we have scaled rapidly, it's become more difficult to maintain our data. We needed to find a way to more easily analyze data from a global perspective to better operate all departments.*

Brad Fisher,
VP, SMSI Group

SMSI Group had four core requirements for a BI platform:

1   **Integrate and blend data from all streams, including Zoho CRM and Zoho Creator, without manual intervention**

2   **Offer mobile access for employees in the field without compromising security**

3   **Create and publish reports and dashboards to offer clear, actionable insights and sales forecasts**

4   **Fulfill all applicable privacy and security compliances**

The Solution

SMSI Group had already been using Zoho CRM and Zoho Creator for several years and, after careful consideration of several enterprise BI platforms, chose to implement Zoho Analytics due to its ease of use, data blending capabilities, variety of visualizations, and the overall value it offered. The team used native data connectivity and blending options to seamlessly integrate data from across the company into Analytics for end-to-end analysis.

Solution highlights:

- Data is seamlessly autoblended from all data source apps across the company

- Reports and dashboards for management team track KPIs like sales performance, target fulfillment, employee productivity, and the hours and materials used for jobs

- Automation and ease of use drastically cut the amount of manual work required for data analysis compared to Excel

- Powerful forecasting capabilities have enabled more realistic sales targets, which has increased morale and productivity on the sales teams

> *Zoho Analytics was our first choice... Other products were too expensive or too complex and didn't integrate well with our tech stack.*

Brad Fisher,
VP, SMSI Group

Benefits and ROI

The impact of replacing Excel spreadsheets with Zoho Analytics has been dramatic. It offers more powerful data analysis with much less manual input. This has streamlined data reporting processes that used to take 4 or 5 hours to just 15 minutes, freeing up time and increasing productivity. The company is able to accurately track more KPIs, from individual sales performance to overall employee productivity. Most importantly, Analytics uses past sales data to forecast future sales, which has enabled the company to set more realistic, data-informed sales targets. Now that targets don't feel out of reach, teams are more motivated and, with more data-driven strategies, are closing more deals than ever before.

Since starting its digital transformation, ABA has seen:

| **20%** increase in sales year-on-year | **4–5 hrs** for data analysis reduced to **15 mins** | Dramatic improvement in **productivity and morale** |

> **" We used to set sky-high sales goals and the teams never hit their target. Since implementing Zoho Analytics, we are now forecasting realistic targets for our team and morale has increased.**

Brad Fisher,
VP, SMSI Group

Zoho offers a suite of intelligent enterprise business software, including an award winning CRM suite, the industry's only comprehensive analytics and BI platform, and a powerful low-code development ecosystem.

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