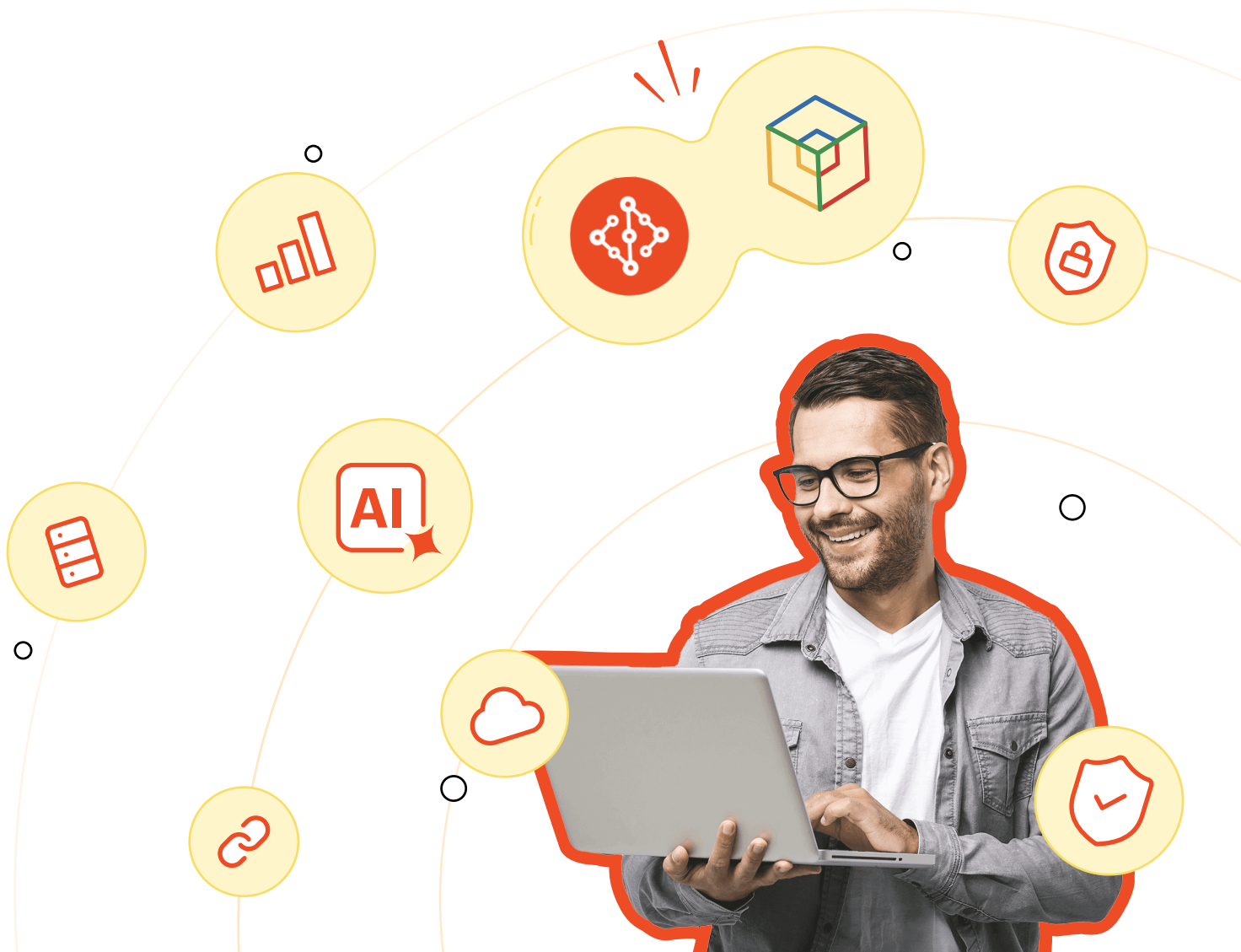SysGroup

# AI-first **MSP** grows with **Zoho One**

# The Company

Creating value through **technology transformation**

SysGroup is a leading IT MSP (Managed Service Provider) based in the UK, with around 110 employees working across its offices in London, Manchester, Newport, and Edinburgh. SysGroup's offerings include cybersecurity, connectivity, hosting, protection, monitoring, hardware, and consultancy, which it provides to businesses big and small across a range of sectors.

In 2023, Executive Chairman Heejae Chae joined SysGroup with an unprecedented AI-first vision for the business and its clients. "I came in with the idea of transforming this business from a traditional IT MSP… to an integrated IT solution, leveraging analytics, machine learning and AI," says Heejae. "The best way to convince our customers to come along the journey is to lead by example. So we adopted the tools ourselves first." Heejae coined his forward-thinking plans "Project Genesis".

We caught up with Heejae, as well as Mark Spear, Head of Business Transformation, to discover how this cutting-edge organisation realised deeper data insights, improved customer service, and accelerated its AI-first transformation with Zoho One.

# The Challenge

## Adopt a software suite that delivers intuitive tools, data transparency, and embedded AI capabilities

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Our business is a product of 4-5 acquisitions, each bringing a bunch of disparate platforms and solutions that **weren't interoperable.**

**Heejae Chae,**
Executive Chairman

SysGroup has a long history of growth by acquisition, the result of which was a fragmented mix of software subscriptions and overlapping applications. Back when Mark Spear joined the business in 2019, he was originally employed to head up its client projects team, but it wasn't long before he was itching to overhaul this patchwork of internal systems, "which is where Zoho came in", he explains.

Mark soon found a kindred spirit in SysGroup's new Chairman, Heejae, who accompanied him to the Zoholics UK 2023 conference to learn more about the platform. "I remember sitting there listening to all the speakers, becoming aware of all the different applications, and I kept poking Mark, saying, 'How come we're not using that?'" laughs Heejae.

Heading back to HQ, the duo doubled down on Zoho One's capabilities, rolling out additional tools and features from the bundle. The goals were clear: to gain visibility of data across the whole business, streamline communication across teams and create a software ecosystem that also incorporated third-party tools. "We needed a single pane of glass on the business - we put Zoho in place to get that," says Mark.
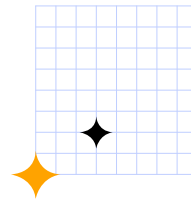
# The Solution

## Zoho CRM, Desk, Projects, and Analytics prove a powerful combination

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**The agility, the flexibility, and the ability to customise**
Zoho to fit your needs - it's very different from my past
experiences with SAP or Oracle.

Heejae Chae,
Executive Chairman

## Zoho CRM

At the centre of SysGroup's software stack is Zoho CRM, which houses the details of all its
clients and facilitates sales and account management activities. "All the information that we
need is in one place - the CRM - and that enables us to manage our clients and sell to them
effectively," Mark says. It's 360° client records collate all the key contacts, sales orders,
contracts, quotes, opportunities, service desk tickets, sentiment analysis, and more in a
single space.

SysGroup's business model is two-pronged: "We sell recurring services to a number of
clients, and we call those 'contracts'. But we also sell one-off items, like hardware or a piece
of consultancy to other customers," divulges Mark. With around 300 contracted customers
and around 700 businesses making ad-hoc purchases, it was key that Zoho CRM reflected
this distinction.

So, to manage clients with repeated spend, SysGroup renamed the standard invoicing module to "Contracts". This is where the account management team log the products and services that they provide to each customer and orchestrate the recurring payments. "From that module, we have some Deluge code which sends data into Zoho Books to create monthly invoices which are sent out to the customers," explains Mark.

Elsewhere, new leads flow into Zoho CRM's "Leads" module from Zoho Marketing Automation, while new enquiries from existing customers are qualified by the relevant account manager before being added directly to the "Opportunities" module. "From an opportunity, an account manager creates a quote for the customer. Once the customer's accepted the quote, we generate a sales order, which is a trigger to the rest of the business that something needs to be delivered," Mark continues. That trigger is handled by Zoho Flow, which reads the "sales order fulfilment type" field in the CRM and automatically creates an appropriate client project and notification in Zoho Projects to ensure all the deliverables are met.

To cater to its sector-specific needs across the client lifecycle, SysGroup has built four custom Zoho CRM modules: "White Space", "Customer Assets", "Supplier Management", and "Internal Purchase Requests". These all sit under the related list on an account record for handy navigation.

Used for cross-selling and upselling, the "White Space" module helps SysGroup's sales team spot new opportunities by recommending suitable products a client could benefit from that are not being provided. "We'll use it to say: 'Okay, that's a customer we only sell connectivity to, so let's go talk to them about cyber, AI, or anything else that we sell,'" Mark explains.

The "Customer Assets" module provides deep-level information about the products a customer already has, going beyond the basics captured in the "Contracts" module. "The Customer Asset module hangs off the Contracts module and goes into a lot more detail about the kit," explains Mark. It stores serial numbers, software packages, licence expiry dates, SSL certificates, and more, revealing the full picture of a client's IT environment. Whenever a licence or certificate is nearing expiry, a task is automatically raised from this module for the procurement team to purchase a timely replacement. The CRM is also plugged into Zoho Desk, meaning SysGroup's service desk team receive a ticket with instructions to install the new SSL certificate or licence. Mark explains the significance of this workflow for SysGroup's reputation and its clients' businesses. "If an SSL certificate expires and we don't know about it, it would stop kit working. That could be a firewall, meaning customers don't have any access to the outside world. Or it could be a server they're really reliant on. We need to make sure that we are renewing these; otherwise, it really doesn't look good."
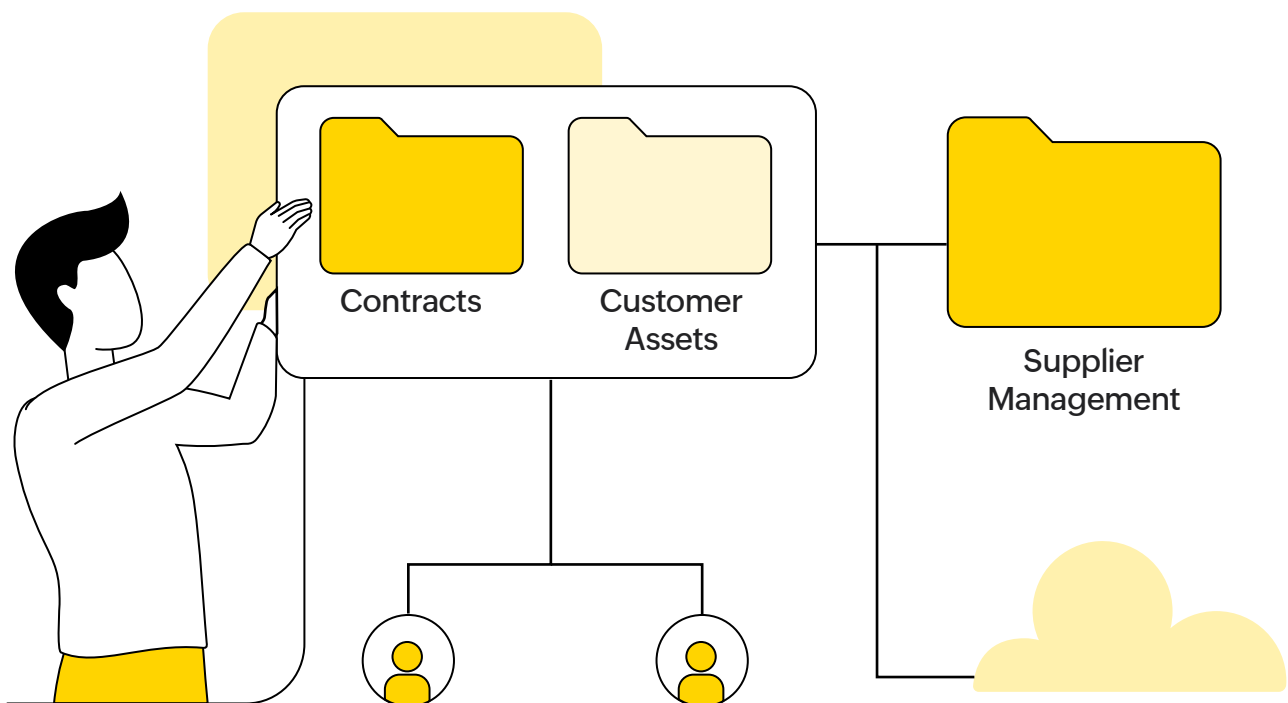
The third custom CRM module, "Supplier Management", helps SysGroup track third-party contracts it's procured for clients. "For each of our suppliers, we obviously have contracts - for leased lines and a host of other things. We need to be able to link our supplier contracts to a customer contract. Then if a customer decides they don't want a leased line anymore, we need to cancel the supplier contract at the same time… this module enables that to happen," asserts Mark.

Finally, the "Internal Purchase Requests" module greatly streamlines the procurement process for client purchases, as well as internal buys. "If we've got a sales order for something we're selling to a customer, the module enables the procurement team to raise a purchase requisition directly from it. That goes through an approval process in SAP, and then the purchase order pops out. Also, the module enables anyone who wants to request an internal purchase requisition to raise a purchase order," shares Mark.

## Zoho Desk

SysGroup uses Zoho Desk to coordinate and manage support tickets from its customers, internal employee requests, and automated alerts from its RMM (Remote Monitoring and Management) software, N-Central.

Mark estimates that 2,000-3,000 tickets come into SysGroup's instance of Desk every month, with automated monitoring tickets forming half of that volume. The integration with N-Central allows the team to stay abreast of any potential issues in their customers' IT environments. "We have a monitoring system for kit that is in our data centres and also kit on customer sites. If that flags any issues, like maybe a server's running out of memory, that will raise a ticket within Desk," shares Mark. From here, SysGroup's engineering team can push out patches or remote fixes to ensure the continuation of service to clients.

Zoho Desk is also used extensively by SysGroup's presales team. If an account manager requires technical help with an opportunity, they can simply click a custom button within the opportunity record to raise a ticket in the presales Desk department. "Then a whole blueprint guides our presales guys through the process and makes sure we're getting all the information we need into the documentation at the end," Mark enthuses.
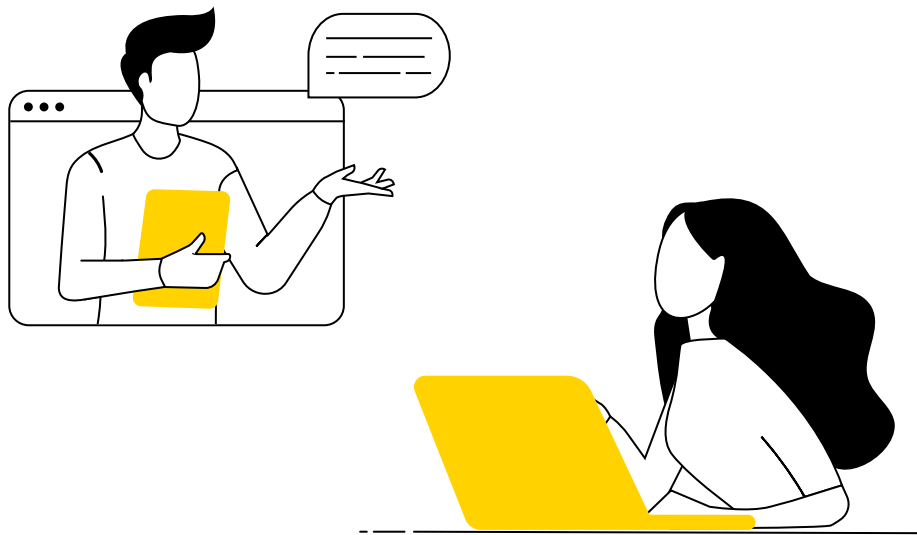
When it comes to clients, they engage with SysGroup's support team by emailing help@sysgroup.com, which creates a ticket inside Desk. This channel automatically sorts tickets into a queue to be answered by first-line agents who typically handle simple requests such as changing passwords and setting up new users. For more complex help requests, Desk enables tickets to be triaged to second or even third-line teams within a few clicks. Some of SysGroup's largest clients even have dedicated agents who take care of all of their requests. "We've got an assignment rule in Desk that sends their tickets directly to the customer expert that looks after them," Mark reveals.

To acknowledge a client ticket quickly, consistently, and professionally, the service desk team has begun using Zia, Zoho's embedded AI assistant, to draft initial responses. Mark explains: "Our first line agents now ask Zia to formulate that initial level zero response. They can validate that the response is okay and then send it. It saves them a lot of time."

Zia also analyses each customer ticket for sentiment, "giving us a happy face or an unhappy face to show how the customer's feeling," reveals Mark. This visual flag alerts SysGroup's agents to those customers who might need a little more nurturing or attention. This happiness rating is also pushed from Desk into the "Voice of the Customer" module in Zoho CRM, a data intelligence and sentiment analysis tool that Mark calls "pretty powerful."
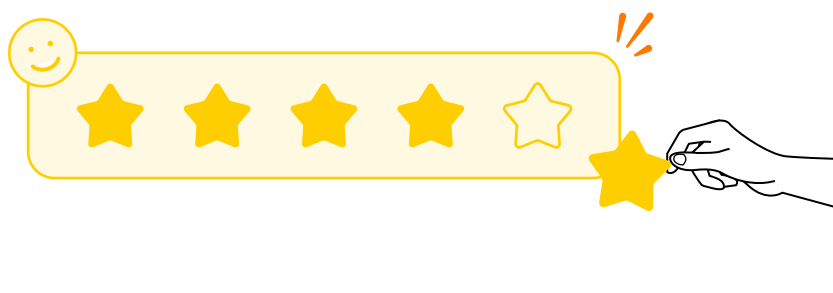


SysGroup is increasingly encouraging its clients to use Desk's customer portal facility to contact the support team. A space where clients can log on, raise new tickets, track the status of open tickets, and view all historic cases, the Desk portal makes it easier for clients to manage IT issues.

For SysGroup, the rewards are even higher. By channelling clients through the portal, they can drive them to elaborate on their requests and add extra mandatory details, enabling its agents to deliver more effective assistance from the outset. "We want to use the portal to push customers to fill in a bit more relevant information, rather than just sending an email saying 'my laptop's broken'," explains Mark. With the need for data sitting at the core of Project Genesis' success, SysGroup plans to feed in the rich information collected by the Desk portal to provide even deeper long-term client insights.

# Zoho Projects

SysGroup offers a comprehensive range of professional services, often involving multiple consultants and engineers working across complex tasks. Whether for a connectivity project or a Wi-Fi enhancement project, SysGroup needed a clear way to track progress, document completed work, and record the time delivered for accurate client billing. Zoho Projects, included in the Zoho One bundle, proved the perfect tool for the job.

If an opportunity is marked as "professional services related" in Zoho CRM's order fulfilment type, SysGroup's team is put at the ready through the automatic creation of a new project in Zoho Projects, which is broken down into templated tasks. If the team needs to build or configure something, this is mapped out with timescales in the tasks and milestones of the project.

SysGroup's engineers enter timesheets against each project for the work they complete. Then, an automation in the back of Projects calculates how many hours have been spent on the project, and how many are left against the contracted scope. "All that data is pulled into Zoho Analytics, and we use that for our 'work in progress' report, which tells finance what they can bill," says Mark.
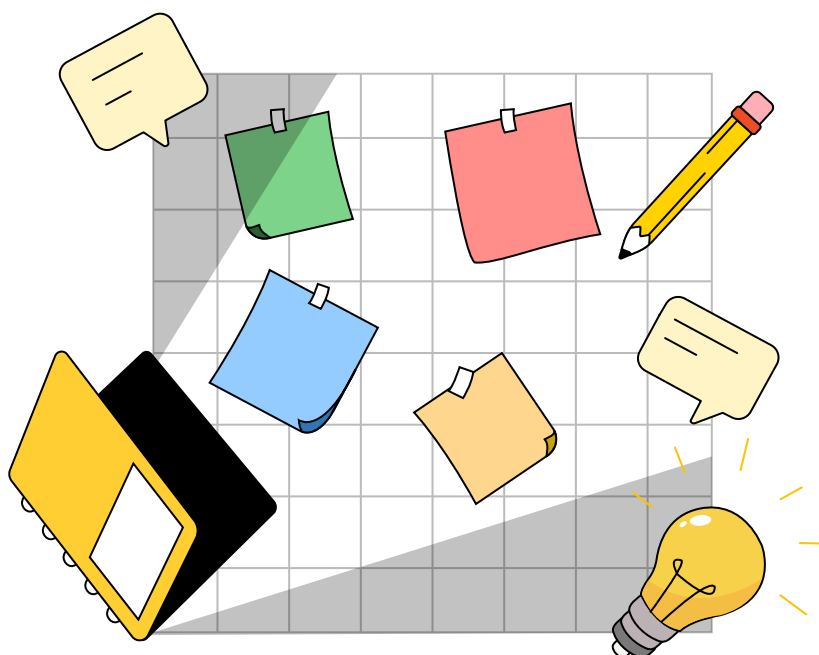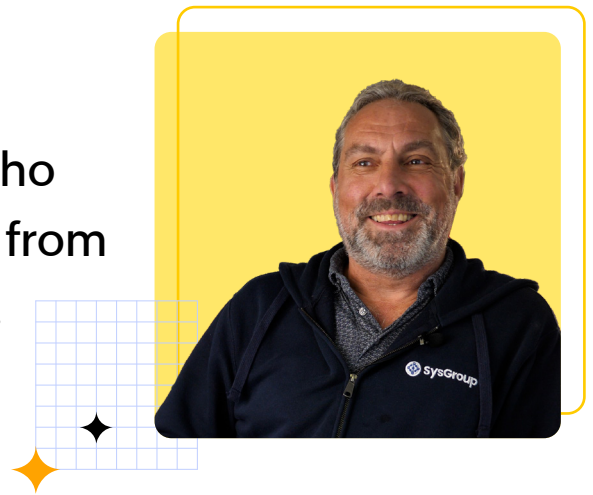
# Zoho Analytics

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## The beauty of Analytics is that it's natively integrated with all of the Zoho applications, so you can pull data in from all of them, and from elsewhere too.

## Mark Spear,
Head of Business Transformation

As well as Zoho Projects, SysGroup pulls data from CRM, Desk, People, Books, Zia, and third-party platforms like SAP, SharePoint, and N-Central, and combines it all inside Zoho Analytics. "As I mentioned, one of the main reasons for moving onto the Zoho platform was this concept of a single pane of glass…now we can join data from all the different apps. Analytics is a great place to pull all the data together and then represent it back to the people in the business that need it," Mark nods.

Using Zoho Analytics, SysGroup's leadership can slice and dice all of its digital data to realise business intelligence like never before, and display it in highly visual dashboards. "You can use widgets, you can use charts, diagrams, and tables of data. We've even used its maps function to track where all our engineers are around the country, so if we're trying to allocate an engineer, we can use that to find out where they are," shares Mark.

As well as dashboards, Analytics creates detailed reports that enable data-led decision-making. In one such report, the amount of monthly revenue SysGroup gains from each customer is compared with the amount of tickets they're raising, helping the team to prioritise their efforts. Meanwhile, its finance team pull reports documenting the open deals in Zoho CRM, all the invoices in Books, and the billable hours in Projects. SysGroup even creates monthly IT reports for each client, shared either by email or through view-only access in Analytics.

Analytics is also used as a real-time motivational tool. Mark advises: "We've built some dashboards that look at what our agents are doing ticket-wise. We're going to put this on TV wall boards in our Newport office, where the service desk sits, so that everyone can see what the live ticket situation is."

# Enterprise Support

For complete peace of mind and personalised assistance, SysGroup subscribe to Zoho's Enterprise Support plan, an additional package of paid support available for organisations with a minimum of 50 users. Businesses subscribed to the plan benefit from access to premium technical support assistance 24 hours a day, 7 days a week, via live chat, phone or email. Subscribers also receive onboarding support and dedicated one-on-one sessions with Zoho product experts.

Enterprise Support provides Mark and his colleagues in the business systems department with direct access to a technical support manager, Ayesha. Mark reflects: "The account manager we've had has been brilliant, she comes back to us really quickly, and she knows her stuff, and that really helps. Because she's worked with us for so long, she knows all about what we've got in place on the platform, and what we're trying to achieve, so we can get really contextual answers very quickly."

# Looking to the future

Reflecting on the journey with Zoho so far, Mark says: "I love the platform, I think it's fantastic, and Zoho One as a concept is brilliant. I call myself a bit of an evangelist for Zoho." Turning his thoughts to the future, he added: "Moving forward, Zoho is inherently part of our transformation plans, and we'll soon be integrating it with our Microsoft suite. There's also Zoho modules we're not using, and we should be - Zoho Expense, for example, and Zoho Contracts. We have big plans to scale with Zoho."

Likewise, Heejae also sees Zoho firmly at the centre of SysGroup's continued success. "When we evaluate whether to buy or build solutions, it makes sense to look at the applications and innovations that Zoho is introducing and use those. It's quicker to the market, and we're leveraging the existing platform we have," he says. "What we also find really compelling about Zoho is that it doesn't stand still. It's continually introducing new applications and features. Now we're getting really excited about Zia, the embedded AI tool, and how it will dovetail with our Project Genesis."

# About Zoho One
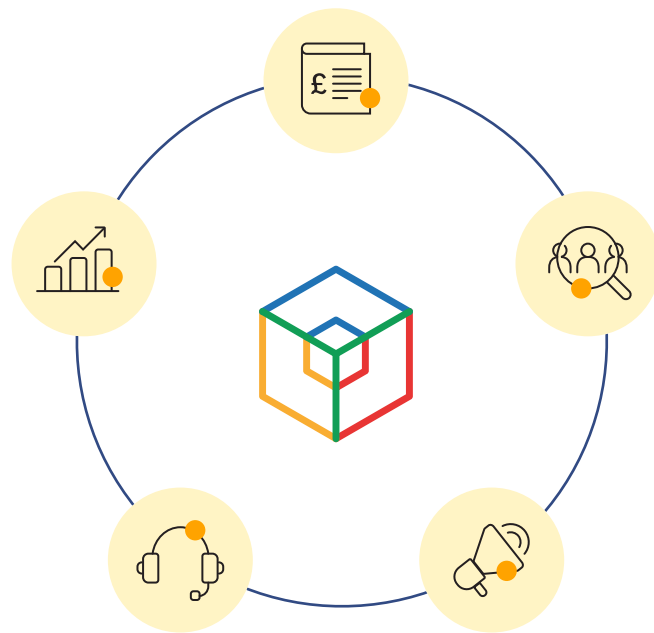
Developed as the ultimate "operating system for business", the Zoho One bundle is a collection of 45+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance, and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration, and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

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