

CLIENT PROFILE

Organisation operating in the renewable energy space providing solar panels for installation in commercial and residential properties

KEY HIGHLIGHTS

- Industry -Renewable Energy
- Duration Three Months

SCOPE OF WORK

- Enhancement of Zoho CRM
- Integration of Zoho CRM and Forms
- Development of Deed Of Purchase

SERVICE OFFERING

Digital Transformation -Enhancement of Zoho suite of operations for an enhanced customer experience during onboarding

CHALLENGES / REQUIREMENT

- Enhance the user experience at the time of customer onboarding
- Development of key forms within Zoho CRM for residential and commercial projects
- Automate the information gathering process, thereby reducing the volume manual entry by Field Sales personnel
- Development of Deed Of Purchase within the Zoho suite confirming the transaction with the Client

OUR SOLUTION OFFERING

Conducted a process walkthrough to gain an understanding of the customer lifecycle and the various points of information capture



Developed the forms in Zoho Forms across all stages of the customer interaction for both residential and commercial properties



Forms were designed in accordance with the design & compliance requirements put forth by partner agencies.

Provided automated notifications to Customer and sales representative at every stage of the project lifecycle



Development of the Deed of Purchase within Zoho automating GST calculation in the backend



Form fields included complex calculations to measure invertor size and capacity.

Configured the auto population of CRM with the customer responses

IMPACT

- Create a seamless customer experience through the project lifecycle
- Auto population of data across forms prior thereby reducing manual intervention
- Compliance with regulatory bodies who require submission of data in a prescribed format
- Updation of CRM module with relevant customer information provided in the forms
- Creation of Deed of Purchase with the key details of the transaction and GST calculation