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## CASE STUDY

### PROBLEMS

One of our long time clients was using ZOHO CRM to manage their telemarketing and customer service areas - their most up-to-date customer information, except financial data, was stored in ZOHO. They also have an e-commerce Web site, provided by a third party, where customers can place orders – some of these online customers pay immediately using a credit card, while other customers have accounts that are paid monthly. We were asked to review their internal systems and procedures and recommend improvements in two areas:

- Sales people were constantly flipping between three different systems: ZOHO CRM for their normal sales activities; the e-commerce site to review customer's recent orders; and, an internal accounting system to access the customer's current account balance, recent payment history and other financial information. This was clumsy at best, so sales people frequently didn't waste time looking at all three systems. Consequently, during phone calls they were not reminding customers when invoices were overdue, or informing customers about other potential problems with their account.
- Cash flow from the customers with accounts (their best customers, representing most of the revenue) was very slow. These customers place orders during a month, then invoices were generated and mailed at the end of the month, and they typically paid 30 days after receiving the invoice. If all we could do was eliminate postage delays and the labor associated with printing/mailing invoices and depositing checks, it would be a big improvement. But we hoped to accomplish much more.

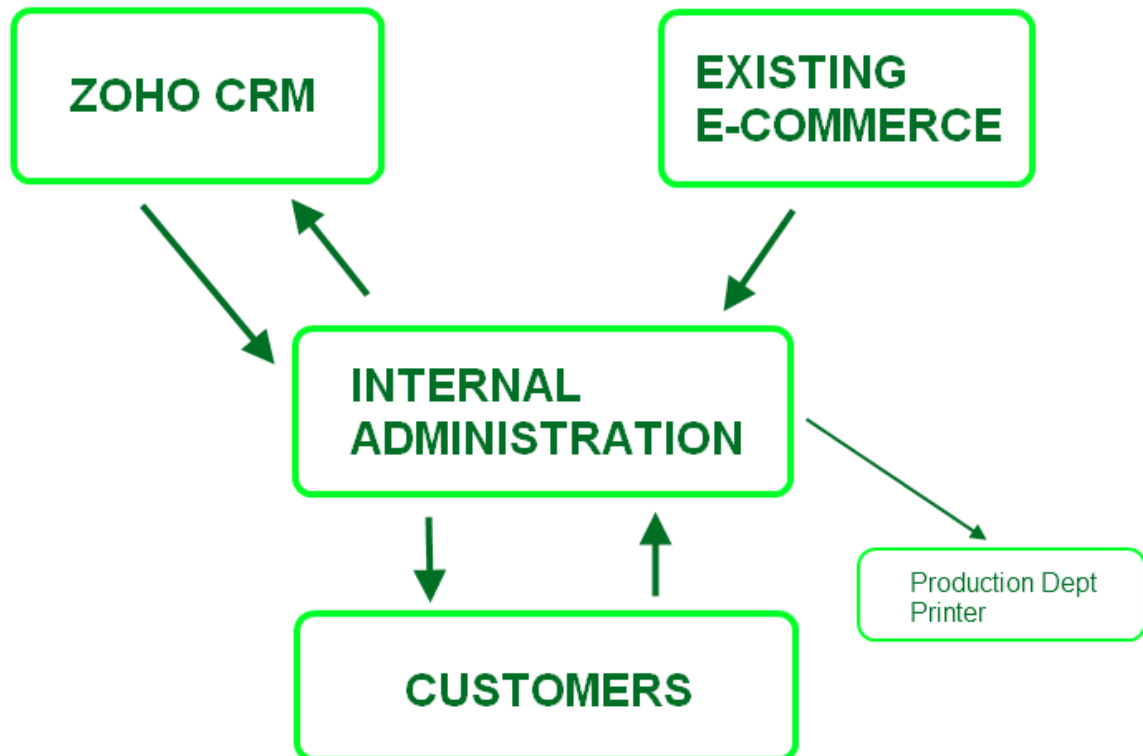
### SOLUTIONS

We first talked with the e-commerce provider and found out that they don't have an API for integration with external systems. However, they can send us orders as they are placed, if we set up the necessary Web service to receive the data. ZOHO CRM has a very convenient API for exchanging data with other systems, and we already had experience using this API on other projects. With that information in hand we were able to begin developing software.

First, we created a process that downloads account information from ZOHO CRM and saves that in a database on our own servers. Having a "local" copy of all the account information allows us to easily combine that with data from other sources to create custom reports and other processes. We query ZOHO CRM hourly during the business day to ensure that our local data is up-to-date (we could update faster, but that's not necessary at this time).

The second step was to capture the orders from the e-commerce system. This required a simple Web service to “listen” for new orders, receive them, validate the information and store it. Part of the validation process is to compare the customer name against the ZOHO accounts and determine eligibility for monthly billing. (This information is contained in the custom data fields that ZOHO supports.) If the order passes a variety of tests it is saved in our database, otherwise e-mails are automatically sent to warn customer service staff of the problem.

With all the required data available on our local system we were able to set up the Web sites and communication channels as shown in the following diagram.



The new Web site called INTERNAL ADMINISTRATION is used by the production staff to update the status of each order, and by management for access to reports. This is also the server where background tasks (all the automatic processes) run.

The new Web site called CUSTOMERS is where customers can review their invoices and payment history, and make payments using either a checking account or credit card. (We are using a company called Prism Pay for processing these payments.)

The information flow, from order to payment now looks like this:

1. Customer places order on e-commerce site
2. Order data is sent to INTERNAL ADMINISTRATION server as XML
3. Order is validated and stored in local database
4. An unexpected benefit of this project is that now as orders come in the production requirements are automatically sent as a job ticket to a printer in the production department. The production team no longer has to go looking for new orders that came in via e-mail in the past.
5. Production team updates the status of each order using the INTERNAL ADMIN Web site

6. When each order is completed the system automatically creates an invoice as a PDF file and e-mails the invoice to the customer. The e-mail contains a link to the CUSTOMER Web site for making payment.
7. Final invoices are automatically posted to ZOHO CRM so sales people have convenient access.
8. Customer makes payment on the CUSTOMER Web site (most are paying by electronic check).
9. Management has access to a number of new reports on the INTERNAL ADMIN site.

After the system had been operational for about six weeks it passed the 1,000 order milestone and we interviewed users to collect feedback. The results were overwhelmingly positive.

- Sales people appreciate having more information available in ZOHO CRM because it saves them clicks and ultimately allows them to complete more calls each day.
- Production staff are able to begin work on new orders faster because the job ticket appears automatically on their printer.
- Management now has a variety of new, real-time reports that consolidate information from various sources. This eliminates spreadsheets that had been compiled weekly in the past.
- Customers have been impressed by the ease of reviewing their payment history. And they are generally supportive of the online payment model.
- **Most importantly, we learned that after only six weeks the Days Sales Outstanding is down by 40%**

## **NEXT STEPS**

With the successful completion of this project we have started discussions for a phase two. That will certainly involve “pushing” more data into ZOHO CRM to help sales people work as efficiently as possible. (ZOHO CRM provides up to 100 custom data fields so this gives us a lot of potential for enhancements.) Management has already requested additional reports and real-time replacements for all their weekly and monthly spreadsheets. A larger effort will involve rewriting, or eliminating parts of their old accounting systems since those functions can be handled online now. As we address the accounting system we will also be able to expose additional customer information in a more robust CUSTOMER Web site.

**For more information about this project, or to talk to one of our consultants:**

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