



Implementation of ZOHO ONE for Real Estate Company

By- UNICLOUD IT SERVICES

INTRODUCTION

The client company was one of the market leaders in the real estate industry. They have a huge client base in their area. The company wants to develop ZOHO One applications and replace the existing Microsoft (manual) database to tackle the upcoming challenges in the business environment. Initially, they wanted to implement ZOHO CRM and later they went ahead with ZOHO Projects, ZOHO Desk, ZOHO Email, ZOHO Cliq, ZOHO People, ZOHO Sales IQ, and ZOHO Campaigns.

Problems:

With the growing customer base, the company felt the need to strengthen its workflow and develop an effective business-customer relationship. The manual recording and generating reports system was time-consuming. There was no application to accumulate the client's data. And the most crucial problem is to work on the leads as leads are coming from multiple channels so there was no proper tool for the systematic working and there were unlimited problems defined by the client which was successfully resolved.

Requirements:



- Manage repository of whole data at one place.
- Integration of CRM with different channel partners/ Lead Providers.
- Give access of CRM with limited features to its channel partners to work on them
- Call center set up with easy reminders/follow ups
- Email Campaigns for all Leads based on the engagement

Solutions

The client wants a CRM which can automate the sales process manage the leads, Timely follow-up to the customers, stores client's data, and all these to be done in less time. After understanding the exact requirements and looking at the hidden needs we suggested client to go with ZOHO applications which will help in smoothening the whole process.

- ✓ **SMS API** integrated
- ✓ **CRM Portal** was enabled
- ✓ Ring Central Integration was done with complex agent assignment rules.
- ✓ Integration with Different partners / sources was done via **API, Zapier, ZOHO Flow** was done
- ✓ **ZOHO Campaigns** was suggested along with **Marketing Hub**. All campaigns were set up in the journeys based on the deal stages.
- ✓ Tracking of emails based on the opening count.
- ✓ **Sales IQ** was enabled to track web activities and categorize the **hot leads**.
- ✓ **Chat boot** was enabled for client engagement

KEY BENEFITED AREAS



Zoho CRM automates the whole process and saves a lot of time. Leads are now directly stored in CRM and improves the Followup process.

Increase Efficiency-
Timely updations and clients data updation increases sales efficiency.

Streamline Human Resource with the help of ZOH0 people.

About “UNICLOUD IT SERVICES”

Unicloud IT Services was officially launched in the year 2018 on the 12th of September

Unicloud IT Services is a cloud service provider company. With over total experience of more than 7 years, Unicloud is committed to provide dedicated services for the ZOHO products to its clients. Unicloud has a high rate of client retention and successful deliveries. We have more than 2000+ customers to whom we have provided the services and been providing the support.

Unicloud has completed 697+ Projects along with more than 2000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.



REACH US

Plot No F-190/3rd Floor, Phase 8B, Industrial Area,

Mohali - 160055 Punjab, India

FOLLOW US



CONTACT US

Call: 911724660874

Gmail: info@uniclouditservices.com

<https://www.uniclouditservices.com>

