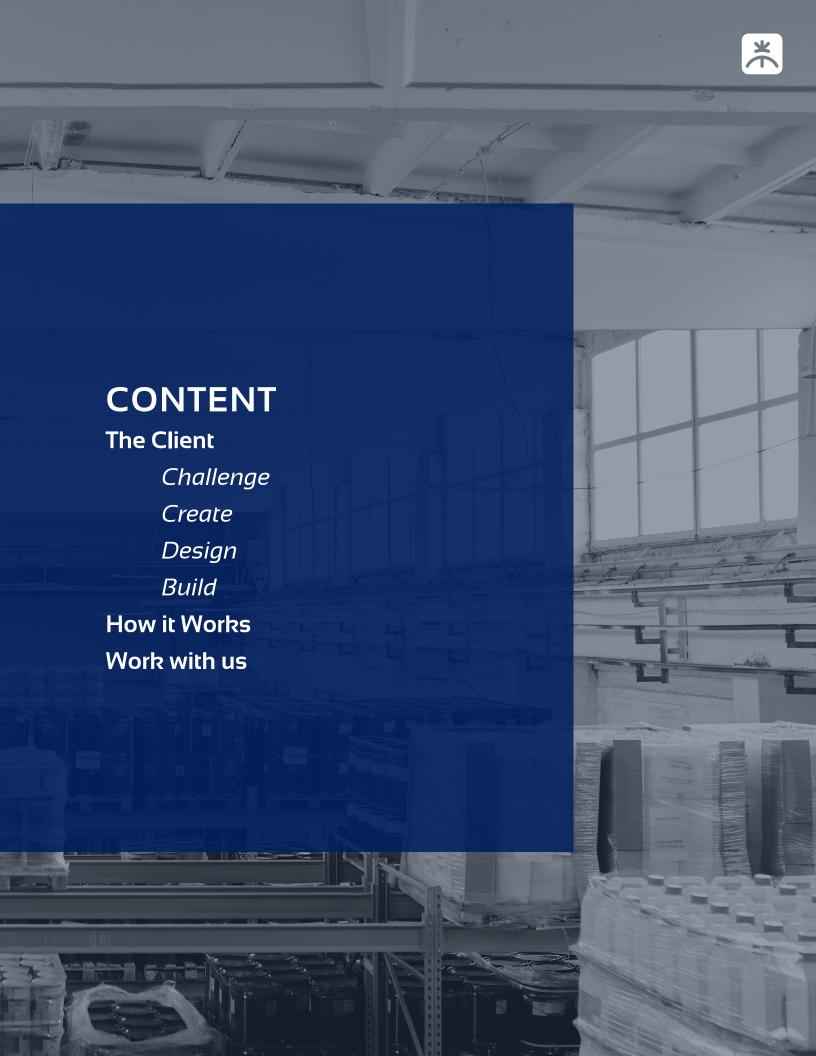# Operations
VIRTUALIZATION

DIGITAL TRANSFORMATION FOR AUTOMATION AND IMPROVED PRODUCTIVITY

For more than 17 years, Aepiphanni has been the trusted advisor for growing companies, helping them perform better, operate more efficiently and *win!*

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business consulting

CONTENT

Case Study

THE CLIENT

Retail consumer chemical cleaning solution provider.

WHAT THEY WANTED

To improve the efficiency of retail operations and enable team members to work remotely.

HOW WE HELPED

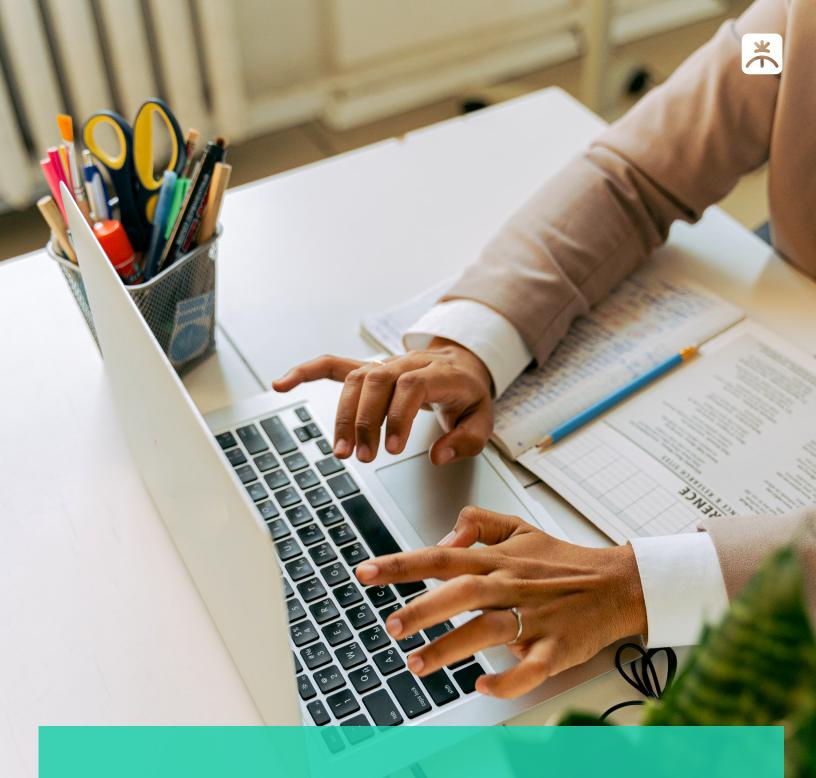Search, selected, customized, integrated and trained team members how to use Zoho CRM and Zoho Inventory.

WHAT THE COMPANY GOT

» Business analysis to map existing processes
» Re-engineered processes to work within the Zoho CRM and Zoho Inventory infrastructure
» Systems architecture - the conceptual model that defined what components are used, how the system works, and how data is captured and related in the system
» Defined existing 3rd-party integrations to maximize productivity
» Identified new opportunities in reduced risk and increased thru-put
» Provided a complete solution set that allowed most office team members to work more efficiently remotely.
» Increased productivity by over 300% as a result of automation, paper-free transactions, and elimination of multiple entries of the same information
» Rapid implementation

CHALLENGE

The company needed to respond quickly to environmental change which would require many office team members to continue business operations remotely. We needed to get this done inside of two weeks.

CREATE

The company had a documented sales process which simplified our business analysis. We worked with them to further understand their needs, existing systems, how they currently worked together, and identified several gaps that could be addressed via the new system.
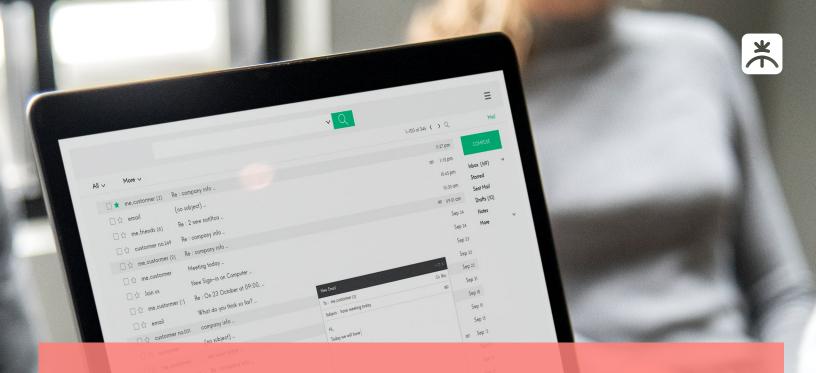
The organization had already selected Zoho CRM and Zoho Inventory as their desired solution, which also helped to fast track this project.

DESIGN

In redesigning processes for this implementation, we were required to re-engineer many of the company's existing processes while giving them access to the same information as was previously required. Furthermore, since this company was a product company that received sales information from several different sources, our plan had to include normalizing the data that would be synced between the different sources and the CRM and managing the different stages in the sales cycle each source would require.

The most challenging component of this build was automating the sequences to eliminate waste - time, resources and repetitive tasks without harming the customer experience while ensuring management that the change would be beneficial to both the company and its customers.

BUILD

» As a result of our work, the company's essential office team is now able to work remotely with the confidence that all customers are managed effectively.

» The company is now able to work more efficiently despite working remotely through digitalization of all office transactions.

» The warehouse can get orders out faster and with fewer steps, reducing overall cost and accuracy.

» Effective inventory management allows the company to maintain a lower overall stock, have fewer outages, and requires fewer manual inventory counts.

» Leadership can utilize dashboards to review live updates of activities in the company.

» Financial data is pushed directly to the accountant, allowing her to provide more accurate accounting data than the company could previously benefit from.

» The simplified processes allow new team members to be onboarded faster.

» The company's ability to protect client personal data has been enhanced improved through digitalization, enhanced individual security measures, and improved processes.

» The system provides the company with historical data that will help them with forecasting, process improvement, and a paper trail if needed.

What makes this company extraordinary?

When the COVID-19 pandemic was announced, the company took immediate steps to enable team members to work remotely while continuing to provide their client base with essential products to keep them from harm. Team members were flexible in adopting new processes, leadership supported the team as well as the changes to enhance the effectiveness of the transition.

Ready to start a NEW project?

Contact us at

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