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# The Right Solution INTEGRATION

INTEGRATION OF ZHOONE BUSINESS OPERATING SYSTEM

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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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## Case Study

### THE CLIENT

A spinoff consumer service company.

### WHAT THEY WANTED

To have a system selected, customized and installed that would support their total business operation.

### HOW WE HELPED

Search, selected, customized, integrated and trained team members how to use ZohoONE Business Operating System.

### WHAT THE COMPANY GOT

- » Highly customized solution that supports 100's of contractors while isolating them from the core system
- » Single installation that supports multiple companies on a single data base allowing them to maintain complete customer histories
- » Integration with a call center solution
- » Custom integration with lead generation solutions
- » Advanced reporting
- » Individual contractor inventory management
- » Customized training by role



## CHALLENGE

This owner was in the process of opening a new company that would help to support lead generation for his primary company. The primary company was operating on Zoho Creator, performed many tasks manually and in duplicate/triplicate and each sale was quite labor intensive.

The owner wanted the new company to be more streamlined and thus, wanted a platform that would work within his budget that would also support the business operations.



## CREATE

To get a full understanding of the requirements, we worked with the leadership team and department heads to map out their current processes and help us understand where they were currently struggling with their current solution. With this information, we were able to create both process maps and a requirements document which we used to shop vendors for the project.

Through our research, we identified ZohoONE as the top contender given the price, flexibility, ease of customization, scalability and features. This would serve both the short and long-term needs of the company.



## DESIGN

With processes in hand, we needed to re-design the company's processes in order to digitalize certain steps. For the most part, we maintained the flows that they currently used, but were able to bypass many manual processes including data entry, reporting, customer tracking, invoicing, inventory tracking, credit card processing, communications tracking and emailing.

The leadership also informed us that they would be working with many contractors as they expand throughout the country, but they did not want them to have any access to the main database of customers as many would have their own businesses but not the access to leads that this company had.

We also had to be flexible because this was a new venture for the company and no one actually had all of the answers in the field, so that as new information was made available, we had to remain agile to develop and launch new features as quickly as possible.



## **BUILD**

- » As a result of our work, the company was able to support substantial growth, from 3 states to covering 38 states within 18 months.
- » Mobile applications were built that integrate with the main database without giving access to contractors.
- » Mobile applications were developed that did not require additional per-user fees (there is a small annual fee).
- » Appointment system was developed with integrated SMS and push notifications so back office personnel don't have to call to inform them about upcoming appointments.
- » Field team members can now collect data, create and invoice clients, take payments, track inventory and ship items from the field to the main office through the application.
- » Back office team members no longer must create all invoices for every single customer due to invoice generation in the field while on site with the customer.
- » Many tasks have been automated through the new system, saving the company precious time and money.
- » A call center solution was sought, pricing negotiated, and integration performed into the system.
- » A custom application was developed to pull data in from a third-party application and push it into the CRM where it was immediately processed.
- » Custom reporting was developed to give them greater access to on-demand information.
- » Provided ongoing support as different needs were identified.



# What makes this company extraordinary?

This company embodies innovation and marketplace growth. Watching them grow from a couple hundred leads per week to thousands per week has been nothing less than phenomenal. They have put significant effort into automating processes, from customer and contractor communication to invoicing and processing while maintaining a high level of customer support.







**Ready to start a NEW project?**

**Contact us at**

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