

**ORGANIZATION OPERATING IN THE WEALTH MANAGEMENT SPACE BASED OUT OF ONTARIO, CANADA****KEY HIGHLIGHTS**

Industry -
Wealth Management

Project Duration -
Two Months

**SCOPE OF WORK**

- Adoption of Zoho CRM
- Integration of Zoho CRM
- Campaigns
- Survey
- Books and Creator
- Development of Deed Of
- Purchase
- Supply Chain

**SERVICE OFFERING**

Digital Transformation -
Adoption of Zoho suite in
order to enhance
customer lifecycle
management

CHALLENGES / REQUIREMENT

- Enhance the user experience at the time of customer onboarding
- Development of Financial Need Analysis for each Client and to offer services or investments plans accordingly
- Automate the entire client lifecycle from onboarding, setting up meetings on Zoho Meet, financial needs analysis, proposal of offering, client acceptance, execution and finally feedback using Zoho Survey

OUR SOLUTION OFFERING

- Conducted a process walkthrough to gain an understanding of the customer lifecycle and the various points of information capture
- Developed the Financial Need Analysis (Creator)
1. Form as in Zoho Creator 2. Forwarding the FNA to the client 3. Receipt of email by client
4. Responses and submission by client 5. Viewing clients responses to top sheet
- Digitizing of Proposals & Recommendation, emailing of recommendations to clients, client acceptance and approval
- Development of Zoho Survey to automatically send out surveys to customers and raising alerts in case of negative feedback
- Provided automated notifications to customer and sales representative at every stage of the engagement lifecycle

IMPACT

- Create a seamless customer experience through the engagement lifecycle
- Auto population of data across Zoho Modules thereby reducing manual intervention
- Updation of CRM module with relevant customer information provided in the forms
- Creation of financial need analysis, digitization of proposal, recommendation and acceptance steps. Tracking and raising of alarms
- Developed Zoho Campaigns to attract new customers and Zoho Survey for existing customers