

CLIENT PROFILE

Organisation operating in the renewable energy space providing solar panels for installation in commercial and residential properties

KEY HIGHLIGHTS

- Industry - Renewable Energy
- Duration - Three Months

SCOPE OF WORK

- Enhancement of Zoho CRM
- Integration of Zoho CRM and Forms
- Development of Deed Of Purchase

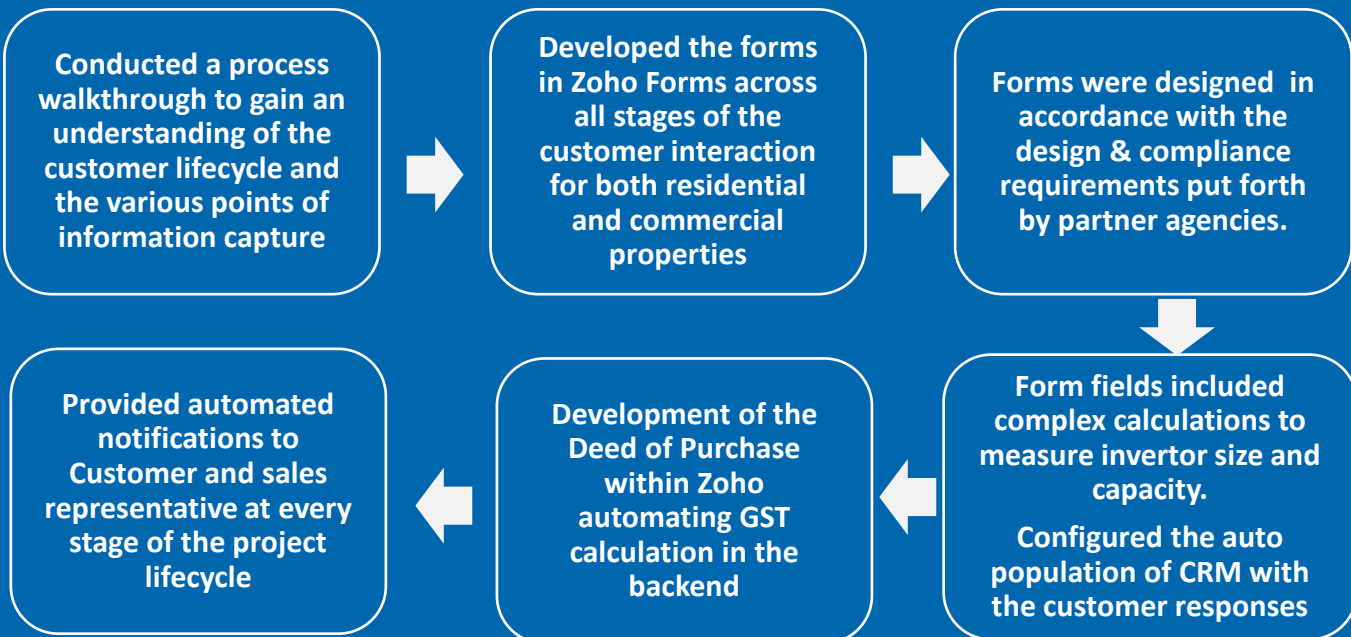
SERVICE OFFERING

Digital Transformation - Enhancement of Zoho suite of operations for an enhanced customer experience during onboarding

CHALLENGES / REQUIREMENT

- Enhance the user experience at the time of customer onboarding
- Development of key forms within Zoho CRM for residential and commercial projects
- Automate the information gathering process , thereby reducing the volume manual entry by Field Sales personnel
- Development of Deed Of Purchase within the Zoho suite confirming the transaction with the Client

OUR SOLUTION OFFERING



IMPACT

- Create a seamless customer experience through the project lifecycle
- Auto population of data across forms prior thereby reducing manual intervention
- Compliance with regulatory bodies who require submission of data in a prescribed format
- Updation of CRM module with relevant customer information provided in the forms
- Creation of Deed of Purchase with the key details of the transaction and GST calculation