



# CASE STUDY

## About iCAN K-mint Wealth

The company has been dedicated to Long-Term Wealth Creation and Wealth Preservation, by providing optimal Investment and Insurance solutions for their clients. Their products offer clients goal-driven investment planning and risk management solutions.

### Company Location



Pune, Maharashtra, India

### Industry



Financial Services

### Application Replaced



Legacy System

### Zoho Product/ Services



Zoho CRM

# CASE STUDY

## The Challenges

The company sought a modern approach to gathering customer information, aiming to move away from traditional methods like Excel spreadsheets and written notes. Their primary goal was to develop a comprehensive application that could not only acquire customers and leads but also serve as the core platform for their entire business operations.

### Their key requirements included:

- ↳ Implementation of a CRM system, with a preference for Zoho CRM, to efficiently manage and automate various business processes.
- ↳ Development of an internal application that would seamlessly integrate with the CRM, ensuring that all data is reflected accurately within the CRM system.
- ↳ Utilizing the CRM as a robust backend for secure and organized data storage.
- ↳ Establishment of an automated system for sending out regular emails, managing workflows, and meeting deadlines to enhance operational efficiency.
- ↳ Implementation of strategies to maintain constant engagement with customers, ensuring they remain integrated with the company's business flow.
- ↳ Incorporating a ticketing system to elevate the overall customer experience, offering effective support and issue resolution.

## The Solutions

Our client's core objective centered around comprehensive data integration within Zoho CRM. Leveraging the expertise of our Zoho CRM consultants at AGSuite Technologies, we seamlessly integrated Zoho CRM for the client, resulting in the following integrated functionalities:

- ✓ Zoho CRM served as a pivotal data management tool, centralizing and organizing all collected information.
- ✓ Data from the client's application was efficiently transferred to Zoho CRM, enabling the CRM to retrieve and generate records.
- ✓ The CRM was not solely used for data storage but also incorporated other business processes. It sent prompts for form submissions, and reminders for completion, and facilitated the assignment of internal tasks to drive progress.
- ✓ An embedded form builder within the mobile application empowered the transformation of leads into potential customers by enabling easy form completion.
- ✓ Automated and continuous follow-up reminders were implemented until the assigned tasks were completed, ensuring proactive task management.
- ✓ The introduction of a ticketing system allowed the assignment of tasks to specific teams or members, ensuring timely response within agreed Service Level Agreements (SLAs).
- ✓ A blueprint implementer was established to create a step-by-step process for record completion. Users were guided through a series of necessary actions, ensuring the required steps were taken to fulfill and finalize records.