



# Financial Companies

## Executive Summary

After years of manually onboarding their new customers, an Indiana-based financial advising company selected the Zoho Suite of applications to help them sell money management services, tax and payroll filings, and insurance services. With the help of Klein Consulting, LLC they implemented 70 user licenses for their Tax, Accounting, and Insurance departments.

## Introduction

This customer sought an easy-to-use CRM that would allow all of their departments to track the progress of customer acquisition and service fulfillment. Once a customer was acquired, they wanted to ensure they were offered a complete financial solution that utilized the products sold by multiple departments. This system had to allow the ability for cross-department communication, while adapting to each department's unique fulfillment style.

## The Challenge

Before using Zoho, each department had its own CRM or Excel Spreadsheets for tracking sales and product fulfillment. This lack of a uniform process meant that potential revenue was left on the table and the complexity also complicated employee onboarding. Additionally, potential clients were not being effectively tracked or converted into deals. This system was disjointed – and at times incorrect – resulting in potential client losses and opportunities for lost revenue.

## Our Solution

Because this financial company had a proprietary selling process that made them stand out in the industry, Klein Consulting knew that Zoho's out-of-box applications would be just the foundation of a complete enterprise solution. Klein Consulting began by migrating all of the legacy data into Zoho CRM and Zoho Books and then focused on building custom applications for each department using Zoho Creator so that they could all track product fulfillment according to their unique processes. Finally, all of the applications were connected to Zoho Analytics for a centralized data repository that can be used for leadership

reports.

### **Implementation and Results**

After two months of development, the applications built for this financial company went live. The implementation of streamlined processes directly and immediately impacted all other departments including Tax Business Services (TBS), Insurance, and Wealth. All of the departments are now able to create and convert prospects and opportunities while using Zoho to visualize and track contacts. For TBS, Zoho allowed accounts for clients to be created with ease, and firmwide notes to be generated and categorized. Insurance and Wealth Departments are currently using the applications made in Zoho Creator to track products and customers, and find the products to best serve the customers needs. Development is continuing in Zoho Books to streamline customer invoice notifications, and through the CRM, send reminders to customers. By increasing the efficiency and reducing wasted man hours spent manually logging and tracking processes, this financial company is looking to the future to expand their growth across the country, using the processes developed in Zoho.

### **About Us**

Klein Consulting, LLC is a Chicago-based system implementation and data analytics company. We assist mid-sized businesses with moving their operations to the cloud. Over the past 6 years, Zoho's Suite of applications have been used by Klein Consulting to streamline operations within company departments and provide their leadership with the oversight they need to make informed decisions. When working with a new client, we first implement Zoho's out-of-box solutions and then focus on automation using Zoho Creator and third-party integrations.

What makes us unique is our team's strong understanding of databases and the Deluge coding platform used to power Zoho. We will work with your team to define an optimal user experience, and then translate that into a back-end system architecture that will allow you to scale your company quickly and efficiently.

The team at Klein does not outsource our work overseas or to smaller firms. Our entire team is located in our Chicago office. When you come to us, a dedicated Project Manager will accompany you on your development journey and ensure your goals, timeline, and budget are met. Access to our customer support will be made available 24/5 and we can quickly answer questions, fix bugs, or provide training to new employees.