



# Learning Management Solutions

## Executive Summary

A leader in financial advising courses teaching students about investing in the stock market, real estate, and cryptocurrency had spent many years of manually on-boarding new customers. With the help of Klein Consulting, they selected the Zoho Suite of applications and implemented 85 licenses to connect their Sales, Registration, Compliance, and Accounting teams spanning three locations.

## Introduction

This customer was looking for an easy to use CRM that would allow their sales team to migrate from using pen and paper to track leads to a cloud-based solution without a learning curve.

## The Challenge

The advising courses that they sell were originally hosted on a legacy Learning Management System, but it provided a poor user experience for customers and administrators could not grant/revoke course access based on when a customer had made a payment. Revenue was being lost because customers continued to use the services whether or not they had paid.

## Our Solution

Klein Consulting, LLC recommended moving the online courses to a Learning Management System that had optimal API integration with Zoho Subscriptions. The development was done in two phases:

1. Migrate course data to the new LMS.
2. Connect LMS to Zoho Subscriptions to manage course access and payment.

To further automate this process, a stock management tool was also integrated with Zoho Subscriptions. Based on the financial advising course a customer purchased, Zoho Subscriptions would give the customer access to the stock management platform.

## Implementation and Results

By implementing Zoho CRM, Subscriptions, and Books, all of the departments in the company

can now effectively communicate with each other. From a lead coming into the CRM to a customer receiving course access in Subscriptions, data is collected to show the sales and marketing investments that were necessary to acquire the deal and the estimated sales commissions. Email notifications sent via Zoho Campaigns ensure that a customer is made aware of upcoming payment due dates and auto-renewals so that they have an up to date credit card on file. This ensures a consistent revenue stream for our client.

## **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.