

# Cozelix CRM - Odoo

## Case Study

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*"Every company can benefit from a CRM solution no matter what. We're seeing new opportunities to use the CRM every while as it solves most of our pitfalls on tracking. I'm extremely happy with the team and their cognitive ability to solve business problems."*

Yezzu, CEO – Cozelix Technology Solutions

A case study on building a complete CRM solution  
for a technology-based Company



## About Cozelix

Cozelix Technology Solutions is a company that is fully engaged in **branding**, **web design** and **development** and has even emerged as a leading IT recruitment firm for several companies across the United States. Global businesses approach them for a consultation on the right choice of technology whether it is cloud computing, business applications or testing and automation outsourcing. Cozelix has the ability to display customer value through guaranteed returns on investments.

## *The Problem*

While sales leads were aplenty, Cozelix's sales force was still using spreadsheets to manage, allocate and functionalize their leads. Statuses were tediously updated on the sheet after observing every inquiry and follow up schedules were also updated manually. However, while the efforts of the staffs were commendable, there were some issues with the strategy.

- Firstly, the process was prone to error.
- Lead nurturing and lead scoring modules were affected due to the manual involvement. The profitability of the client largely went undetermined.
- Since the team was working on spreadsheets, they did not have a centralized solution. Which meant they had to perform multiple updates to arrive at a decision if a particular lead was an opportunity at all.
- Appointment scheduling is a pivotal task in the lead management process. There were no notifications or alerts that would inform the sales personnel about maintaining an itinerary.
- Retrieving historic data of the scheduled meetings was an impediment due to ambiguity.
- The lack of a potent project management process only meant that newly converted accounts did not receive the assiduity that they ideally should.

Cozelix soon realized that though their prevailing design might work if their office was smaller, it was just too obscure to handle their large lead and conversion volumes. Besides, they were an extremely technology-rich and digitally-knowledgeable company and knew that to develop an integrated CRM system, they would require professional experience and expertise.



## *Solutions Offered*

Our experts conducted a thorough analysis of the business while defining and mapping the gaps and requirements within the existing scenario. We then presented a set of recommendations that would deliver value to the company's stakeholders. The solutions involved process improvement through a powerful lead management CRM that would leverage technology to improve marketing and align sales. Once deployed the CRM automate the lead scoring process, build a contact list, nurture the leads that haven't been closed, and review marketing efforts. The Odoo integrated CRM would be the ideal solution that comes with quick turnaround and faster go-to-market times.

## *End-to-end Lead Management*

An end-to-end lead management process within the CRM was formulated that would handle everything from inquiry to remarketing. While touching multiple parts of the entire digital framework, the CRM would tightly align all sales and marketing to achieve stronger metrics. A qualification filter would be placed between the source and the channel in an attempt to accurately identify, quantify and classify the leads. This way sales-cycle times would be reduced and cost per lead would also be economical. Thus an automated provision was made to upload leads into the system with precision, either in bulk or individually so that follow-ups are managed successfully. Other features include campaign management, leads mapping, reminders and notifications. A drip-marketing facility was also incorporated, aimed at promotions of products and services to an existing database.

## *Integrated Quick Notification System*

The only way to increase accountability is to create a dynamic CRM that can actively motivate the team while keeping them updated with regard to the daily tasks that they have to perform. We integrated the powerful Twilio notification system into the CRM module that comes with a range of features. It optimizes SMS deliveries through a detailed phone look-up and even protects the system against frauds. Compatible with any carrier, SMSs can be sent and received from anywhere across the globe at any time. Critical information is shared fast to initiate quicker decision-making and improve processes.

- Choose Triggers from Twilio and actions from Odoo or vice versa.
- Connect your Twilio and Odoo accounts for authorization; and create the Twilio & Odoo integration in minutes.



## *Custom Invoicing Solution*

Automated invoicing solutions are embedded into the CRM to create bills according to the company's payment plan and schedule. Approved payment procedures are incorporated to facilitate hassle-free invoicing that reflect the company's unique business requirements and privacy commitments. Payment preferences and debt collection policies including actionable steps are also placed in the billing.

## *Managing Permissions*

Containing all visual and intuitive pipeline features, the CRM would accommodate user rights management that also provided a better overall picture of the organization. User roles and properties are defined for restricted accessibility. Each role and each level has its own rights that is set by an administrator.

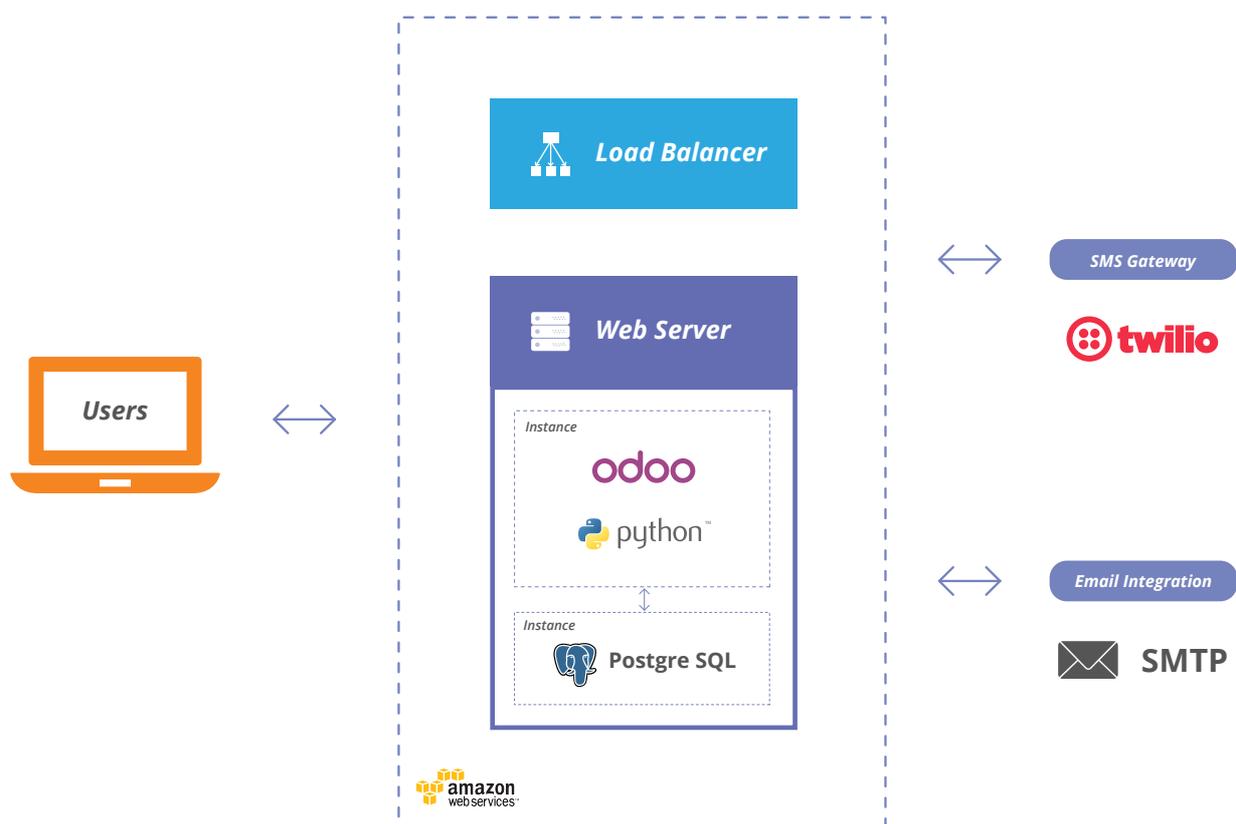
## New Customer Initiation

We included a new customer initiation module using the flexible, open source Redmine Project Management tool that also supports cross-platform and cross-database functioning.

It would let the company manage multiple users from a single window where a new customer will be automatically added after a sales lead is converted. It also comes with a versatile issue registration and tracking system.

Workflow transitions can be easily achieved through this design along with a collaboration that also allowed users to share messages. This way the entire sales team would be acquainted with the data flow and the current status of the project.

## Technology Architecture



# *Outcomes*

## *Lower Costs*

Due to automation of tasks, quality control costs have decreased resulting in a savings of \$22,500 per year. Overdue accounts and receivables have dropped by 18% translating into \$11,000 per month in liquid revenue.

## *Lower Risks*

Integration with other systems, such as Twilio Redmine and Custom Invoicing, allows automation thus eliminating errors and improving efficiency.

## *Key Benefits*

- Twilio® and Redmine® integration
- Quick searches
- Superior search functionality which maximizes time boosted productivity
- User-friendly
- Added security and business safeguarding procedures are followed with user restrictions



*A technology solutions company providing  
Professional services & enterprise architectures  
for businesses globally helping our clients maximize ROI.*

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