

Tellofy CRM - Odoo

Case Study

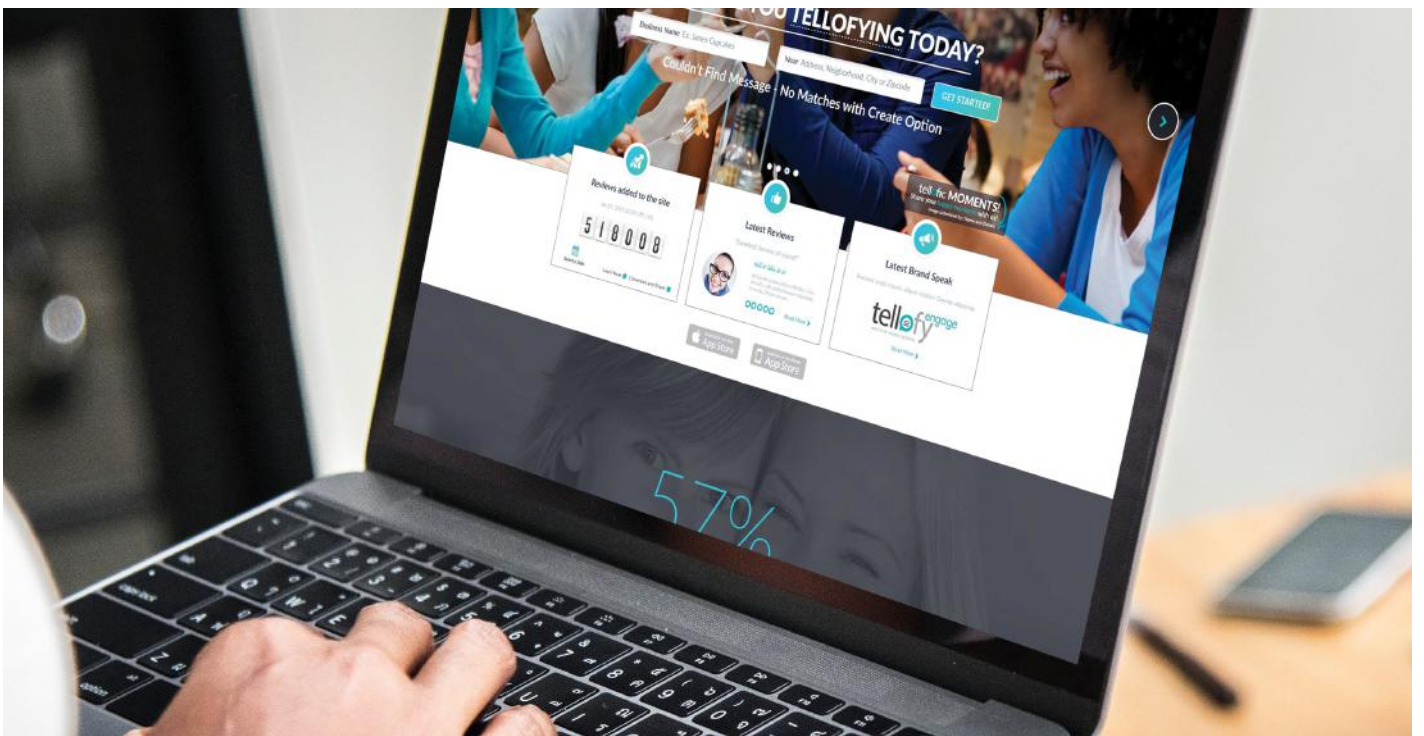
“I have worked with various software partners in the past and I knew outsourcing comes with its own challenges but I have been very happy with the work of GSM plus Infotech.”

Saurabh Majumdar, CEO – Tellofy

Case study on building a complete CRM solution for an analytics and feedback review system

About Tellofy

Tellofy belongs to a unique vertical that captures real-time customer experiences and even helps their clients make sense of the overwhelming data load that is gathered across a customer lifecycle. In turn, the activity generates positive customer experiences while increasing social proof and driving revenue and loyalty. Their analytical tools offer integrated business analytics as well as customer engagement insights.



The Problem

If there is inbound traffic, then it means there is intent. Even when there were enough inbound leads generated, lead nurturing wasn't sufficient. Which means, there was no plausible strategy that would help them classify and characterize their inbound traffic. *As a result valuable customers were lost due to impeded response times.* This was mainly because there was no specific system for timely retrievals of the lead by the inbound sales person. In addition, the existing subscriptions and new payment schemes from immediate sales campaigns were disorganized and lacked a cohesive structure.

The Solution

After thoroughly analyzing the client's business requirements, a robust Odoo CRM software was proposed that would focus on seamlessly integrating the sales process by capturing every inquiry, which would then be filtered, graded, distributed and converted into a contact. Thereafter the lead would be nurtured to be made available to the sales person whenever required, for scheduling follow ups or even preparing drip-marketing campaigns. In-built tools helped the sales team track and respond to every inbound lead. As part of the solution, we also offered easy third-party application integration and native connectors to sync leads easily.

1) Complete CRM Solution

A complete CRM solution meant clear definitions of every stage in the funnel. An internal framework and tracking system for customer intelligence was developed where customer insights were deepened through analytics and automation. A scoring methodology would be embedded in collaboration with the sales team to pass the leads on to them. Redundant activities such as sales scripts, responses, etc., would be automated. Key reporting metrics such as total number of communications sent and received, lead to conversion rates, grading leads, mapping accounts, etc., can be easily accomplished.

2) Stripe Payment Integration

Stripe was already the new standard as far as online payment models were concerned. It contains some really powerful and versatile tools for an internet commerce business. We successfully scripted a subscription and one-time payment module that will be synced with the Stripe data base to ensure that payment plans are not tampered. If Stripe were to be disabled at any point, we even provisioned interim data support. Users will still be able to access the plans and subscriptions for a while.



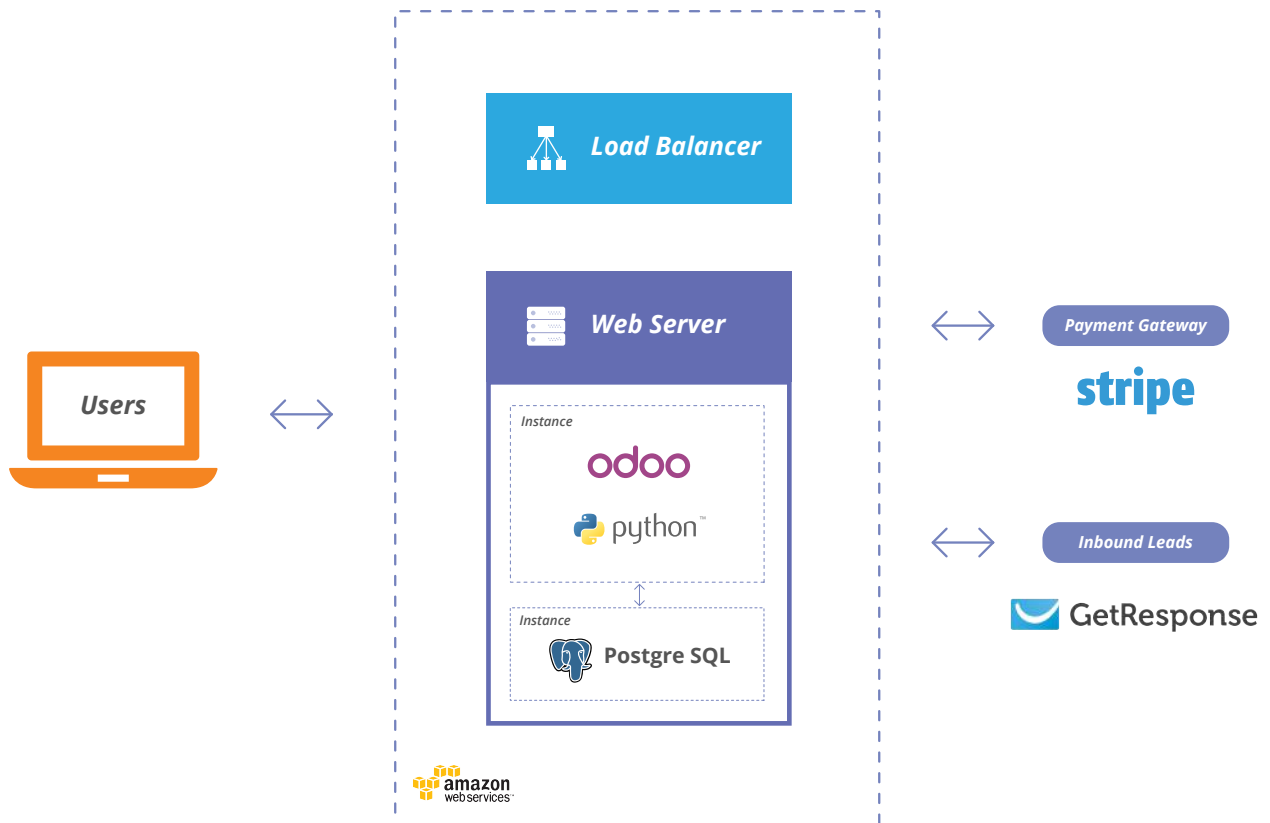
3) Automated Marketing Campaigns

After improved lead identification, follow up modules and better lead scoring, we focused on creating personalized email marketing campaigns, which is also one of the most effective ways of being in constant touch with your customer data base. Automation involved saving time on address sorting, reaching a targeted audience and at specific intervals. The perfect email marketing tool was created that measured spam scores, analyzed domain health and even calculated the ROI.

4) GetResponse Mailer Integration

Tedious manual tasks got eliminated when we integrated the Get response API. This could also be customized based on customer inputs. AI was used constructively to quickly convert leads into opportunities thus saving the labor of contacting, engaging and qualifying every lead. A unique workflow was tailored where the inputs were directly acquired from the GetResponse tool.

Technology Architecture



Outcomes

Improved Data Organization

The client's biggest concern was immediately addressed when the CRM for lead management was implemented. Each inbound lead was analyzed, tracked and quantified. A complete and progressive database was available at the sales teams' fingertips.

Enhanced Communication greater Customer Service

Smooth communication, both internal and external are a crucial part of every business. The CRM prepares detailed and communicable information to facilitate improved customer service thus enhancing customer experiences too. All available information can be easily retrieved to provide timely follow ups leaving no customer unhappy.

Improved Departmental Productivity

Bottom line, the CRM lets all departments to share information and pass it down the funnel to achieve the desired organizational goals. A single information can be reused in different ways by different teams to achieve concurrent outcomes. Reviews collected from the customers are also recorded and analyzed.

Sales Process Analytics

Powerful analytical features are incorporated so that detailed information about the customers, sales activities, demographics, revenue generators etc., can be easily retrieved. Sales Performance reports are also available with restricted access to user tiers.



The Statistics

With the solution, the client was able to not only streamline the leads and channelize them, they were also able to improve the quality of their products and services based on customer feedback analysis. They worked on all the negative reviews and adapted the rest of the business also into this solution.



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