

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

Summary

Cozelix has the ability to display customer value through guaranteed return on investments. 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.



The Client

Cozelix Technology Solutions is a company that is fully engaged in branding, web design & development. It has emerged as a leading IT recruitment firm for several companies across the United States. The Odoo-integrated CRM would be the ideal solution that comes with quick turnaround and faster go-to-market times.

Highlights

- ✓ Integrated Quick Notification System
- ✓ Effective end-to-end lead management
- ✓ Added security and business safeguarding procedures
- ✓ Custom Invoicing Solution

Business Requirements

- ◆ 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 and observing every inquiry and follow up schedules were also updated manually
- ◆ Lack of a potent project management process only meant that newly converted accounts did not receive the assiduity that they ideally should



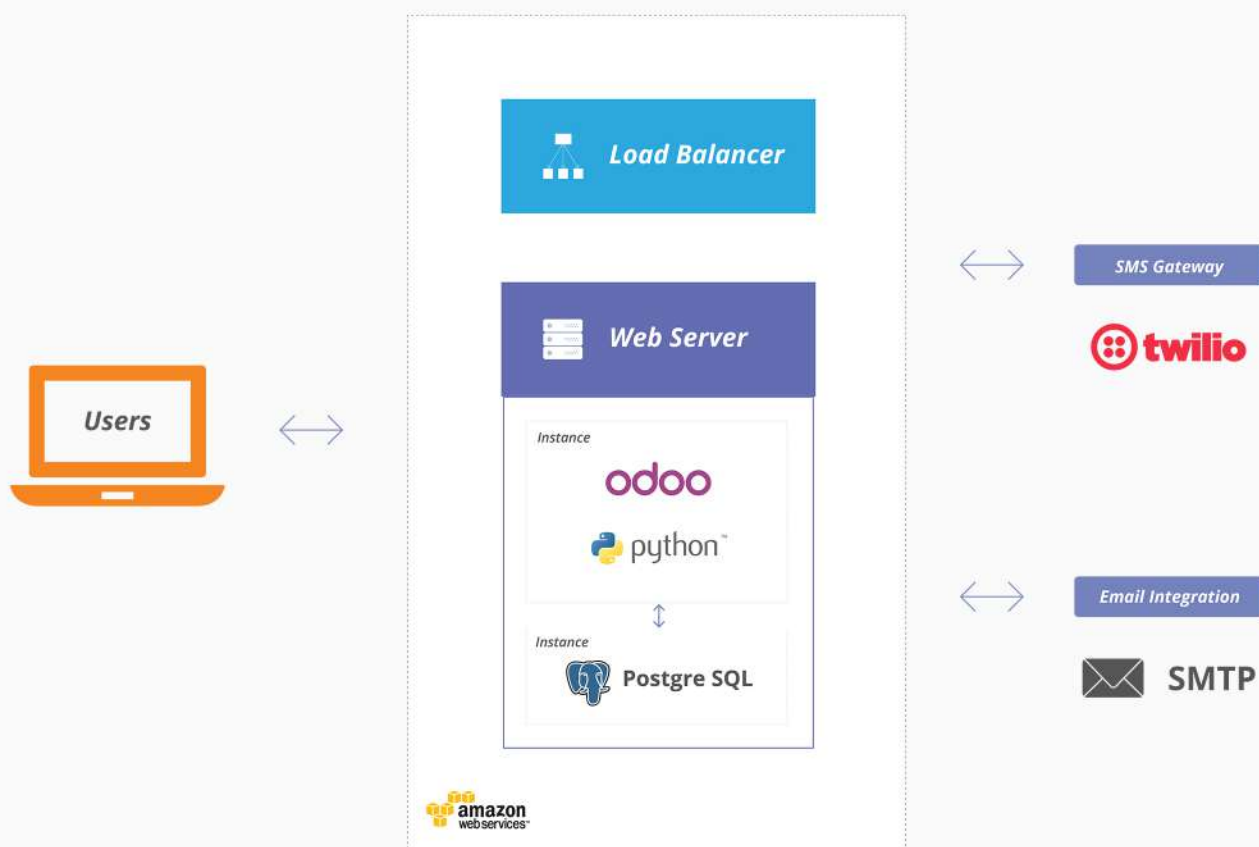
Key Features

- ◆ 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

Challenges

- ◆ Lead nurturing and lead scoring modules were affected due to the manual involvement
- ◆ As 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
- ◆ Retrieving historic data of the scheduled meetings was an impediment due to ambiguity
- ◆ There were no notifications or alerts that would inform the sales personnel about maintaining an itinerary

Technical Architecture



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Our Approach

End-to-end Lead Management

- ◆ Process improvement through a powerful lead management CRM that would leverage technology to improve marketing and align sales
- ◆ A qualification filter would be placed between the source and the channel in an attempt to accurately identify, quantify and classify the leads.
- ◆ While touching multiple parts of the entire digital framework, the CRM would tightly align all sales and marketing to achieve stronger metrics

Integrated Quick Notification System

- ◆ A dynamic CRM that can actively motivate the team while keeping them updated with regard to the daily tasks
- ◆ Powerful Twilio notification system into the CRM module that comes with a range of features
- ◆ Choose Triggers from Twilio and actions from Odoo or vice versa
- ◆ Connect your Twilio and Odoo accounts for authorization, create the Twilio & Odoo integration in minutes

Custom Invoicing Solution

- ◆ 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

Managing Permissions

- ◆ 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

New Customer Initiation

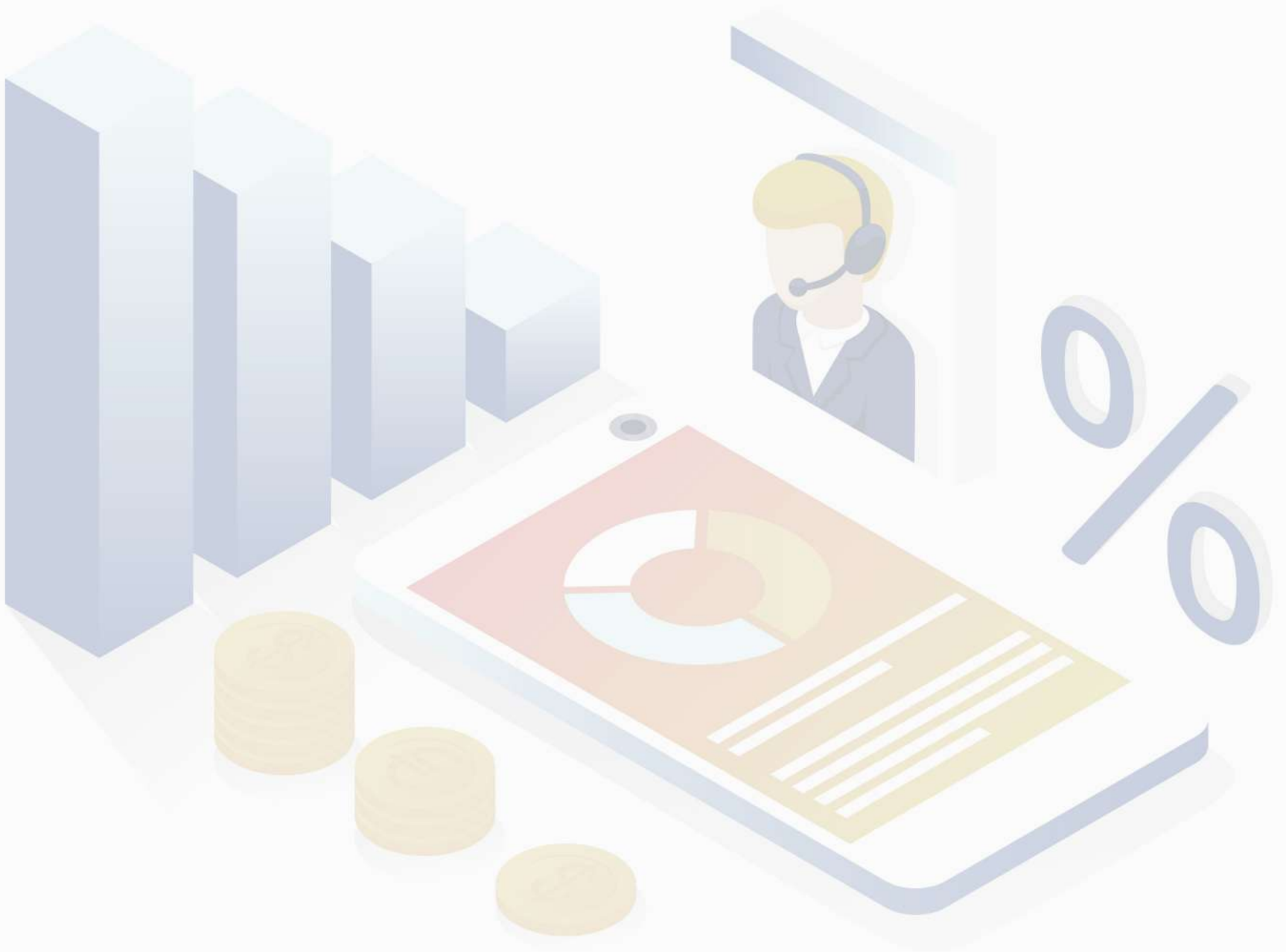
- ◆ A new customer initiation module using the flexible, open source Redmine Project Management tool that also supports cross-platform and cross-database functioning
- ◆ Comes with a versatile issue registration and tracking system

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Results

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



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