

## A case study on building a complete CRM solution for an analytics and feedback review system.

### Summary

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.

### The Client

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.

### Business Requirements

- ◆ Analytical tools to offer integrated business analytics as well as customer engagement insights
- ◆ A complete CRM solution

### Key Features

- ◆ Stripe Payment Integration
- ◆ Automated Marketing Campaigns
- ◆ GetResponse Mailer Integration
- ◆ Unique workflow



### Highlights

- ✓ Improved data organization
- ✓ Sales process analytics
- ✓ Improved departmental productivity
- ✓ Enhanced communication & better customer service



## Challenges

- ◆ Even when there were enough inbound leads generated, lead nurturing wasn't sufficient
- ◆ There was no plausible strategy that would help them classify and characterize their inbound traffic
- ◆ Impeded response time

## Our Approach

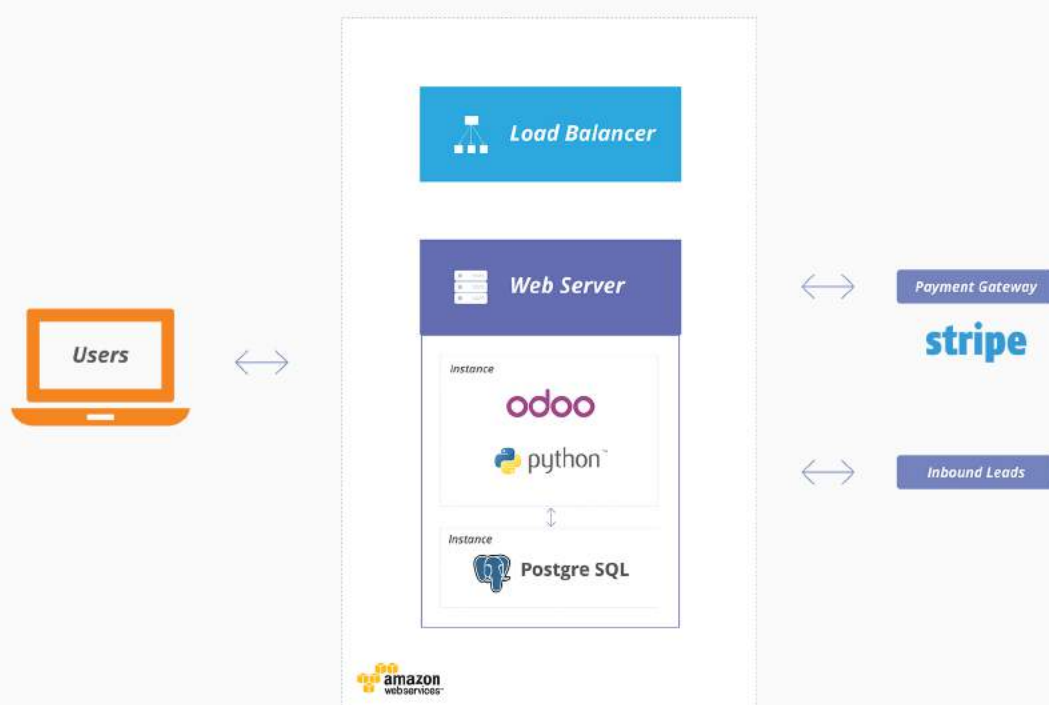
### Complete CRM Solution

- ◆ 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
- ◆ 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

### Stripe Payment Integration

- ◆ Contains really powerful and versatile tools for an internet commerce business
- ◆ A subscription and one-time payment module will be synced with the Stripe database to ensure that payment plans are not tampered
- ◆ Interim data support

### Technical Architecture



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## Automated Marketing Campaigns

- ◆ Creating personalized email marketing campaigns, which is also one of the most effective ways of being in constant touch with your customer database
- ◆ A perfect email marketing tool that measured spam scores, analyzed domain health and calculated the ROI

## GetResponse Mailer Integration

- ◆ Tedious manual tasks got eliminated when we integrated the Get response API
- ◆ Customizable 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

## Results

The client's biggest concern was immediately addressed when the CRM for lead management was implemented. A complete and progressive database was available at the sales teams' fingertips. The CRM prepares detailed and communicable information to facilitate improved customer service thus enhancing customer experiences too. 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. Powerful analytical features are incorporated so that detailed information about the customers, sales activities, demographics, revenue generators etc., can be easily retrieved.



*"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**

Chief Executive Officer Design Window

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