

Customer story

INDUSTRY:

IT



HIGHLIGHTS

Improved Data Analytics in the IT sector using Viva's integrated telephony platform with ZOHO CRM using APIs

CLIENT

A well established IT Sales and Services company with 100+ Sales, Marketing and Support users.

REQUIREMENT

The client used Zoho CRM for sales and support functions.

- Their Sales, Marketing, and Support teams utilised a calling service to engage with prospects and customers.
- The client sought to explore the possibility of integrating Zoho CRM with their telephony service.

CHALLENGE

The client faced the following challenges;

- Using two different applications for calling and managing customer information was time-consuming and tedious.
- Updates in Zoho was on an ad hoc basis.
- Reports generated were not up to date.
- Zoho and the telephony system were not interconnected.

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SOLUTION

[CRM Integration]

To address this complex requirement and challenge, Viva provided an ideal solution for the client.

The proposed solution included the following components:

- Click 2 Call: Users can make and receive calls from Zoho, record the updates online, and trigger the required SMS and Emails
- Call Notification: Incoming and Outgoing call notifications will appear in Zoho.
- Advanced Reports & Analytics: Call reports and analytics as per the client's requirement were provided for effective and timely decision-making.

Added features and benefits:

- Reaching more prospects
- Improved Customer engagement
- Information about callers
- Call recording for Quality and Training purposes
- Improved employee productivity
- Improved conversion rates
- Enhanced customer satisfaction