



Online Investment Platform Increases Productivity 5X by Implementing Zoho CRM

Moving to Zoho CRM, we were able to quickly bring in all of the necessary data, and process our customer requirements in minutes.

COMPANY PROFILE



INDUSTRY
Investment Management



TYPE
B2C



SIZE
201 - 500 employees

FundsIndia is an online investment platform that has been in the industry for nearly 9 years and provides customers access to a wide range of investment products, such as mutual funds, corporate fixed deposits, and stocks from the BSE. With over 1 million users, FundsIndia's vision is to provide every Indian a world-class investment platform and sophisticated investment advice.

Six years ago, FundsIndia was in its initial years of business and had a total of just 50 employees. However, the small team was not an indication of the size of the company's business; FundsIndia had already established a huge customer base and was fast growing. Nearly all of their customer and sales data at that point was stored locally. However, with their continuing growth, the company knew that they needed to upgrade the way they managed their customer data and sales pipeline.

Challenge:

Initially, FundsIndia maintained all emails, calls, and notes in an Excel spreadsheet. But keeping up with their fast-paced growth meant looking out for a solution which would maintain the history of all their customer interactions and provide instant access to their sales history. **“Simply put, we didn't want the data to be distributed locally on individual computers or in papers, but rather digitally maintained in one place, streamlining our business process,”** says Divya Sundaraju, CRM Manager at FundsIndia.

Also, as a Financial Services Company, FundsIndia wanted to pre-emptively know what the customers need, rather than having customers approach them for a solution to their problem. “So, we were searching for a solution which could fit all of our needs but required no technical expertise. That's how we found Zoho CRM,” says Sundaraju.

Zoho CRM's artificial intelligence, Zia, is extremely impressive!

Solution:

Since moving to Zoho CRM, FundsIndia has seen dramatic improvements in productivity across their teams. Moving to Zoho CRM has increased FundsIndia's productivity five times as much as using a spreadsheet. This has obviously had a huge impact on the business. Out of 3,000 customers in a month, FundsIndia used to be able to effectively process only 20%. But when they moved to Zoho CRM, they were able to quickly bring in all of the necessary data, and process their customer requirements in a streamlined manner. This led to a sharp increase in the number of customers processed each month.

When you have everything streamlined in your business, with automated processes that require fewer hours and provide better results, what more could you ask for? That's exactly what Zoho did for FundsIndia!

Results:

Since implementing Zoho CRM, FundsIndia has expanded its use of the app. The company has now leveraged Zoho's artificial intelligence sales assistant, Zia; the Zoho CRM mobile app; and Zoho's support team. "Zoho CRM's artificial intelligence, Zia, is extremely impressive," Sundaraju said. "As a CRM manager, I can plug myself in directly to the sales team and make sure they never slip out of deals, with the help of working tips provided by Zia. Also, the Zoho CRM mobile app helped me analyse my sales rep's occupancy data, with options like Check-in, which is a very advantageous tool for any organization. In addition, Zoho Support is amazing. They have assisted me any time I needed help."

Would you Recommend Zoho?

"To be honest, I sell Zoho on an everyday basis within my organization, and also vouch for Zoho to anyone who asks."

Tools that helped us grow:

 Mobile app

 Zoho Cliq

 Customization



Zoho CRM is a cloud-based software for managing your customer relationship in a better way. It helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system. We are light on your pocket and the features and integrations we give you are unmatched.

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