



Case Study: Saveinvest PTV

Zoho Service: Zoho One

Customer Since: 2023

Sector: Real estate

1.Please describe your company.

Saveinvest is based in Krakow, Poland. We buy land in prestigious holiday locations in Poland, e.g. by Baltic seaside and in the mountains. We divide the land and sell it to private individuals as agricultural, investment and ready-to-build plots.

2.Please introduce yourself and describe your role, your day-to-day activities.

My name is Kamil Markowicz, I am Sales Director and my main responsibilities cover sales as well as planning and implementation of projects and tools related to marketing as well as sales: automations and workflows.

3.What was life like before Zoho? Any specific challenges or pain points?

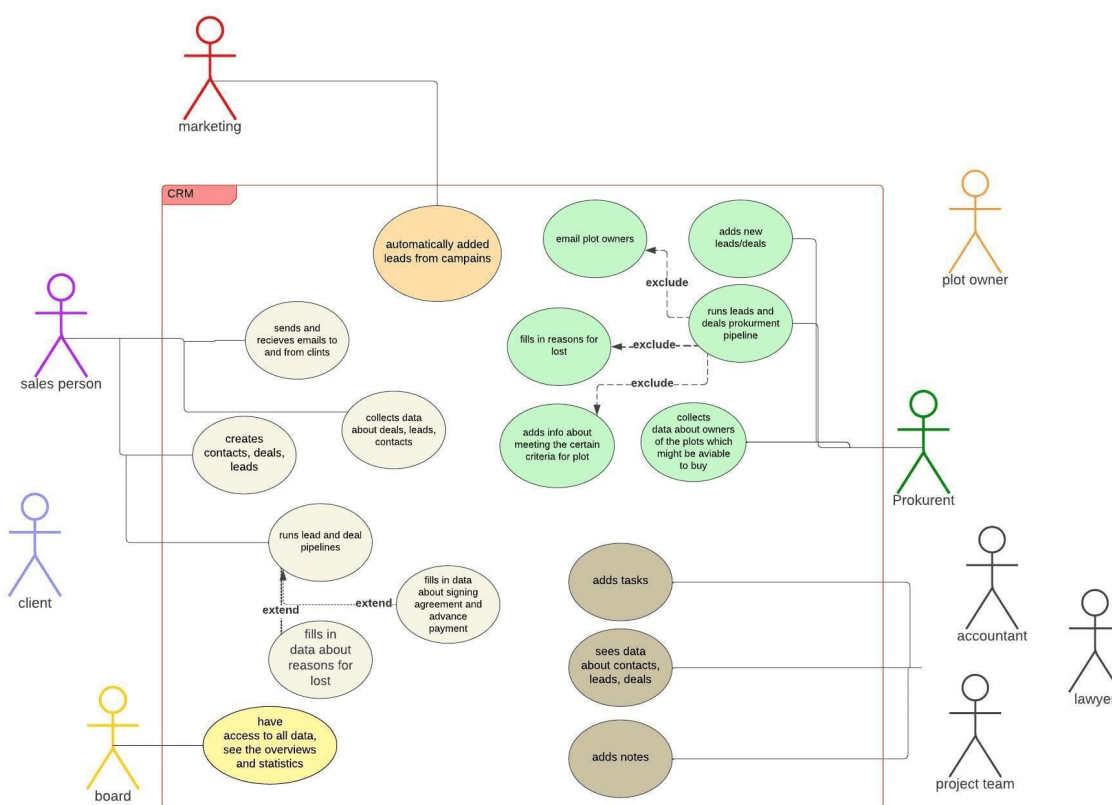
Our previous CRM system, Zendesk, did not meet the expectations of the users. We were lacking reports as well as measuring processes at individual stages. Our various IT tools were not integrated and we had to transfer data manually, which was time-consuming and caused many errors.

4.How did you come across Zoho?

I found out about Zoho through cold-mailing from one of the partners. Initially we were not considering really Zoho as it was not listed in any available in Polish CRM rankings. However, I systematically reviewed and tested over 10 different CRM solutions and went also via Zoho trail. After the tests we have chosen Zoho as it was the most flexible.

5.What led you to select Zoho?

We needed a solution allowing both Sales and Procurement departments to run separate scenarios for both: leads and deals. We have several, non-linear, sales and marketing funnels and our clients may decide to contact a salesperson at various stages of the processes. It was important to be able to analyze different data obtained at the entrance, in the middle and at the exit of the sales funnel.

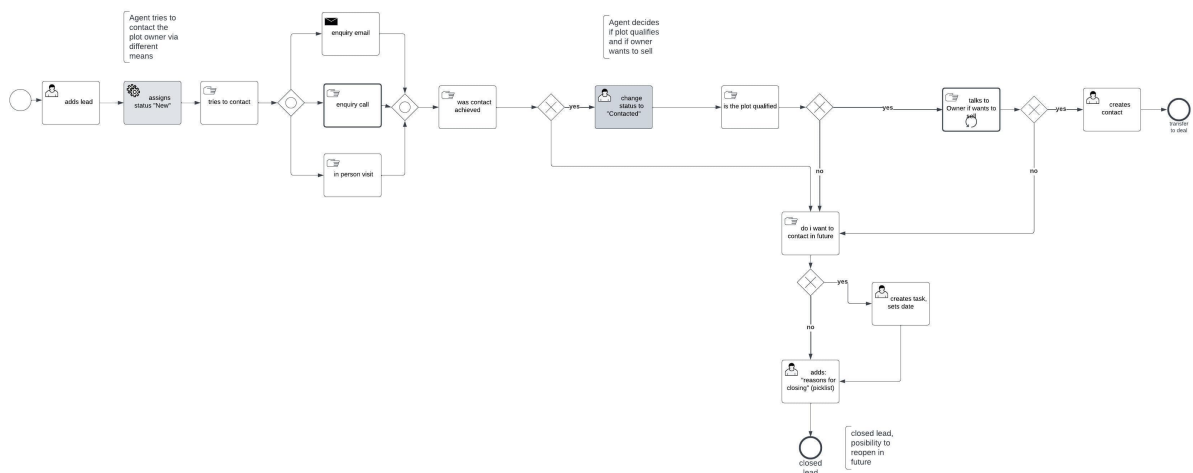


Picture 1: Use cases for Saveinvest CRM

We have chosen Zoho One because it combines many applications in one environment. It helped us to reduce the number of out-of-Zoho IT tools and, as a result, significantly lowered the running costs of the company. Zoho helps us to run marketing campaigns as well as to collect inquiries from our forms from over 30 places where a customer can ask for contact. We have 360 degrees view at the customers, we can conduct and track the history of all the communication from Zoho, check the movements of potential customers on our websites, analyze heat-maps as well as measure and report activities performed by our team. All this is handled by one platform. All Zoho apps are interconnected, and compatible, which allows for the exchange of information between the tools in real time.

6.What was the implementation process like in your business?

The implementation process consisted of a series of workshops during which the analyst from our Zoho Partner, PFC Group, drew the process flow in our company.



Picture 2: simple BPMN drawing of Saveinvest land procurement process

We discussed necessary modules and fields, workflows as well as blueprints in our future CRM. When the design of the CRM and requirements were ready, the project went to developers at PFC Group. They prepared our CRM as per the requirements.

During the process I gained an excellent understanding of the application and currently I am able to develop the system myself constantly. I learned how to implement functionalities without risking of going against the logic of the system.

7. How did your partner assist with the implementation?

We were looking for a Polish company that would be competent enough to migrate the data from the previous CRM system to the new solution. We chose PFC Group because we had an excellent impression of the company since the first meeting. It was the only team that offered us to plan and map the entire project yet before we finally decided to cooperate. We saw that they understood us and we knew it would be a fruitful cooperation. They assisted us at every step of the project: from planning, through coordination and monitoring of progress, implementation of changes to a functioning system. We liked their pragmatic approach. During the discussions, the sales person, who acted as an analyst, draw out the entire concept in LucidChart.

The data transfer was complicated - our data from the old system was not very well organized - but thanks to mapping all the data in Excel, it was ultimately successful.

The only drawback was the necessity to communicate with one of the engineers in English - we would save time if 100 % of the communication was in Polish.

8. Have you achieved your goals?

Yes, we gained numerous benefits from the project:

- we have a working analytical system;
- data about our clients are collected yet before the client decides to contact our company. That is probably the most unexpected functionality;
- leads are automatically uploaded to the system and distributed evenly between each salesperson;
- our websites are monitored 24/7 by the system, thanks to which the marketing department can make strategic decisions based on objective data;
- all data from the old system was successfully transferred to Zoho CRM;
- the costs of the sales and marketing tools decreased several times.

9. What are the biggest benefits for your business of using the One bundle vs using the apps individually?

The most valuable thing is the automatic exchange of information between applications, which helps to avoid human errors while transferring data and results in us having reports and measures at various stages. It allows us to make strategic sales and marketing decisions.

10. Have you created any dashboards that display cross-app metrics side by side? Which apps or components feature in your dashboard(s)?

We have created dashboards in Analytics by combining data from campaigns and CRM.

11. Do you think it's beneficial to have all your data inside one native bundle as opposed to having your data shared across different platforms?

Yes, definitely.

12. Have you recorded any savings in separate subscription fees since leveraging the Zoho One bundle? Are there any apps you used previously that you have been able to migrate to Zoho's equivalent app?

Before Zoho we were using fragmented solutions and that was much more expensive

in total due to inefficient usage of time of our employees. As a result of the implementation we were also able to replace: Contact Monkey, Hotjar, Zapier, Getresponse, Zendesk, Teams with Zoho solutions and at least 500 USD monthly we are saving on licenses only.

13. Have you used the AI application, Zia, to gain deeper integrated insights?

No, we haven't.

14. What are your future plans for the Zoho One suite of apps? Are there any applications you haven't used yet that you would like to?

We have finalized the first stage of implementation: our CRM is ready. The next step will be to manage products on our website from the CRM level and implement tools offered by the Zoho ONE package for other departments in the company: Legal, Administration and Finances, thus we will probably implement the following applications: Projects, Bookings and maybe Desk.

15. How has Zoho One been received across the business?

Generally, the change to Zoho was received positively across the company. However, initially few of our employees were telling that Zoho One is less intuitive than the previous system. Over the time they stopped complaining. Now everyone is happy and the system is used extensively.

16. How has Zoho team supported you on your digital transformation journey?

We were mainly either getting knowledge from the implementation partner or using Zoho resources on the product websites. We contacted Zoho support only once, when we accidentally deleted our CEO account and as a result could not integrate his email. Unfortunately not all Zoho documentation is updated, e.g. "Zoho notes export" entry was updated over 4 years ago and the system looks completely different now.

17. Would you recommend Zoho One to another business?

Yes, Zoho One is a complete solution at an affordable price and is suitable even for small entrepreneurs. It has it all: the basic and the more advanced features. Additionally, there are no limitations imposed on development of the system - it is a low code solution and in case needed the simple Deluge programming language allows even lay people to create their own functions, tailored to the needs and requirements of the company.

18. Would you recommend your partner to another business ?

Yes, each meeting was fruitful - throughout the implementation, we introduced dozens of changes, and the PFC Group team constantly supported us and proposed solutions that have worked in other companies.