

# Black Gold Cafe Private Limited

Client Name : Sandeep Rana

Country : India

Users : 2

Subscription : Zoho One



# ABOUT

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Black Gold Cafe is a popular restaurant in Delhi, offering a welcoming atmosphere and a diverse menu that blends local and international flavors. Known for its exceptional service, the cafe serves a variety of dishes, from hearty meals to freshly brewed coffees and desserts, all made with high-quality ingredients. The friendly staff provides a personalized dining experience, making it the perfect spot for casual meals and special occasions. With its focus on quality, service, and ambiance, Black Gold Cafe has become a beloved destination for food lovers in Delhi.





# PROJECT OVERVIEW


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Unicloud IT Services partnered with Black Gold Cafe Private Limited to improve their operational efficiency by implementing and customizing the Zoho One suite. The project focused on configuring Zoho CRM modules, integrating Zoho Forms, and connecting Exotel IVR for effective customer communication management. The goal of this initiative was to improve the cafe's customer relationship management (CRM), lead tracking, and sales processes, ultimately enhancing customer engagement and business performance.

# PROJECT OBJECTIVE

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The primary objective of this project was to set up a fully customized CRM system using Zoho One to improve Black Gold Cafe's operations. This included integrating key modules like Zoho CRM, Zoho Forms, and Exotel IVR to create a more efficient workflow for handling leads, managing customer data, and improving communication. The aim was to foster better lead management, improve customer follow-up, and automate key sales tasks to improve efficiency and growth.



# CHALLENGES:

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Black Gold Cafe faced several operational challenges, including inefficient manual lead tracking, which was time-consuming and prone to errors. Data entry issues arose from gathering customer information from multiple sources, leading to duplication and inaccuracies. The lack of a centralized system for managing customer communication resulted in missed opportunities and delayed responses. Additionally, the absence of automation in sales processes caused follow-up delays and missed leads. Lastly, the use of fragmented systems for CRM, data capture, and communication created disconnected workflows, hindering effective customer relationship management.

# SOLUTION:

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Unicloud IT Services addressed Black Gold Cafe's challenges by customizing the Zoho One suite to suit their specific needs. A custom Zoho CRM system was set up with tailored modules for managing leads, contacts, accounts, deals, and activities, improving lead management, data accuracy, and automating workflows. Zoho Forms was integrated to capture customer data directly, reducing manual entry and errors. Additionally, Exotel IVR was integrated with Zoho CRM to automate call logging, capture customer interaction data, and improve follow-up management. These enhancements created a more efficient, integrated system, boosting lead management, customer service, and sales processes.

# FEATURES & FUNCTIONALITY:

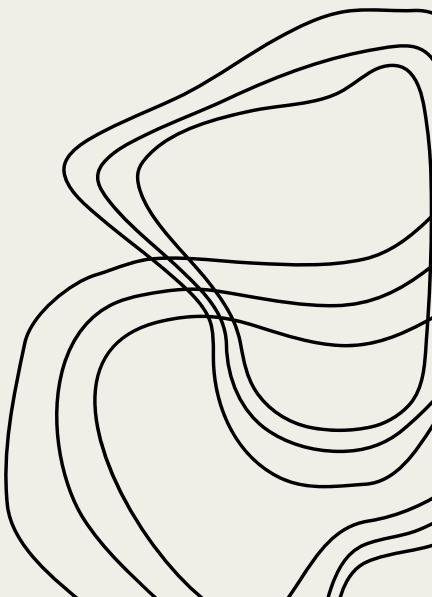
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## **Zoho CRM Customization:**

- Setup of core modules (Leads, Contacts, Accounts, Deals, and Activities).
- Custom lead stages and scoring criteria to prioritize leads based on their potential.
- Relationships between customers and accounts were clearly defined to improve data accuracy.

## **Exotel IVR Integration:**

- Integrated Exotel IVR system with Zoho CRM to automate call logging and improve communication with clients.
- Automated transfer of call data (including caller information and recordings) directly into Zoho CRM.
- Call outcomes triggered actions like lead assignment and follow-up emails to ensure timely responses.





**Lead Management and Sales Automation:**

- Automated task creation for follow-ups when a new lead is generated.
- Integrated lead management process with automated follow-up notifications for faster responses.

**Customer Communication Tracking:**

- All incoming and outgoing calls were logged directly within Zoho CRM.
- Detailed tracking of customer interaction history, improving customer service and communication transparency.

**Zoho Forms Integration:**

- Custom-built forms aligned with the cafe’s branding to capture lead details and customer feedback.
- Automated creation of leads and contacts from Zoho Forms submissions.
- Automated email notifications sent upon form submission for quick follow-up.

What areas do you think we can improve upon to better meet your needs?

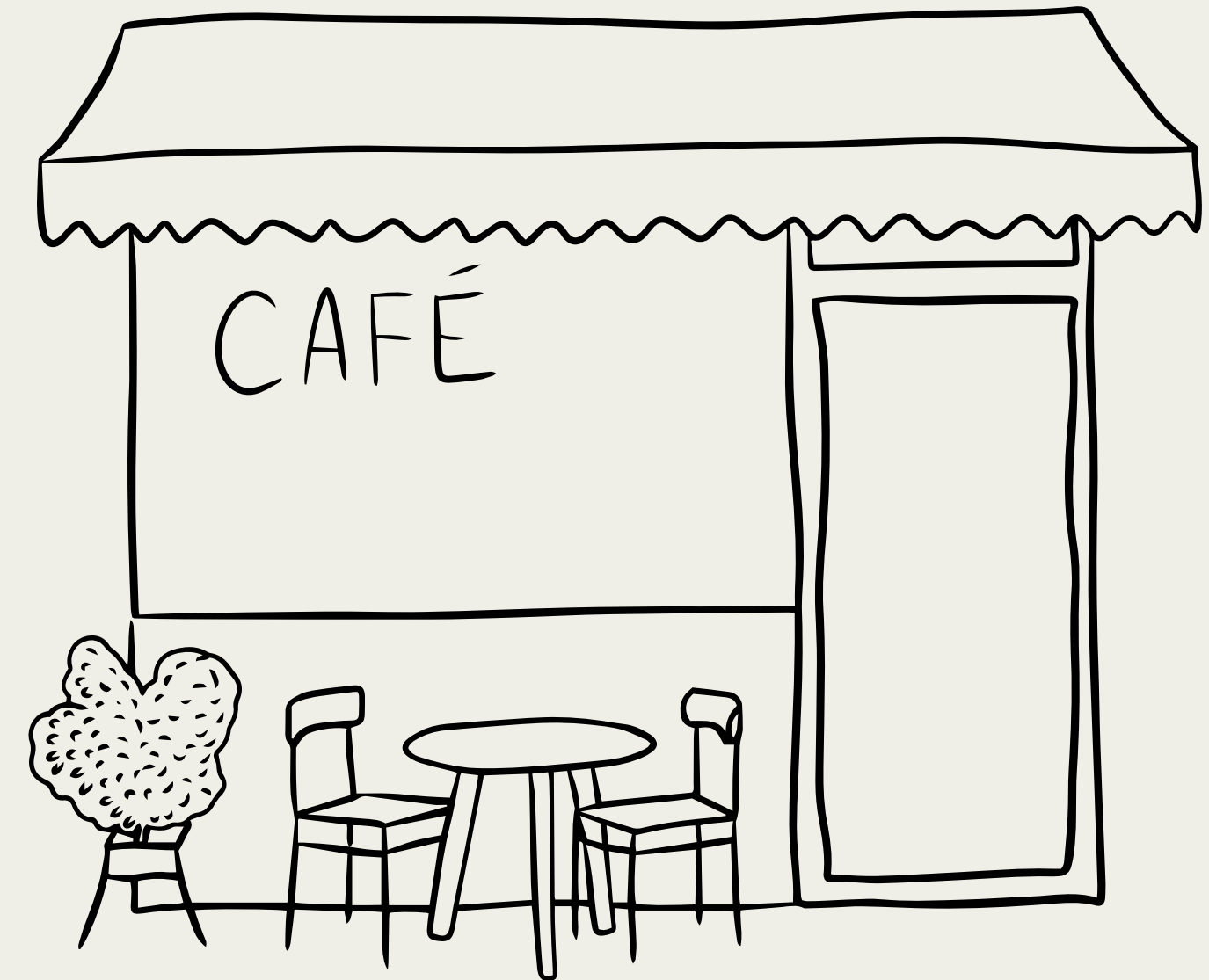
Overall, how satisfied are you with your experience with our company? (1 being Very Dissatisfied and 5 being Very Satisfied)



# CONCLUSION:

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By implementing the Zoho One suite and integrating tools like Zoho CRM, Zoho Forms, and Exotel IVR, Black Gold Cafe Private Limited has successfully improved its customer relationship management, lead tracking, and sales processes. The customization of the CRM system and the integration of communication tools has allowed the cafe to improve efficiency, reduce manual data entry, and better manage customer interactions. With these solutions in place, Black Gold Cafe is positioned to scale its operations, improve customer satisfaction, and boost overall sales performance, ensuring long-term success and growth in a competitive market.

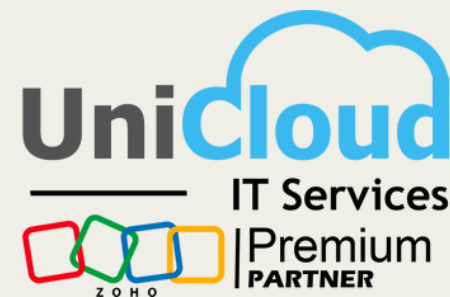




# ABOUT US:

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