

Case Study: Budding Group

CLIENT PROFILE

A business services company that aims to provide an efficient and integrated solution for managing customer relationships. (BUDDING GROUP)

BUSINESS:

Budding Group

- Location: Ludhiana, Punjab 141022, India
- Industry: Aluminum Window
- Website: <https://buddinggroup.com>

OVERVIEW

Businesses can take a variety of actions to overcome these issues and guarantee a successful WhatsApp integration. This entails deciding on a trustworthy third-party service provider with knowledge of WhatsApp integration, developing a precise messaging plan that complies with WhatsApp guidelines, and allocating the resources required to handle the increasing volume of messages. Businesses can also utilise automation technologies to monitor incoming messages and give speedy answers to frequent questions.



THE CHALLENGES:

To enhance contact with their clients, they want to integrate WhatsApp into their CRM platform. They encountered a number of difficulties when implementing this integration in the following situations:

- Task creation: The client wanted to be able to automate triggers on WhatsApp once the task is created as well as receive task notifications on the messaging app/Whatsapp/Email.
- Scheduling meetings: The client requested that meeting invitations and confirmations be sent and received via WhatsApp when the meeting is created.
- Call management: The client requested that WhatsApp is to be used to manage calls and set up follow-up appointments.
- Lead generation: The client wanted to be able to deliver lead details to their team members as well as receive leads over WhatsApp.
- OTP authentication: The client intended to use OTP once the meeting is scheduled and later at the time of the meeting the host will verify the former OTP.
- The client wanted to share an attachment for a different user who can work on the same and revert.
- Custom dashboard: The client wanted a customized dashboard that reflected the specific requirements mentioned above.



THE SOLUTIONS

- We used a third-party Interakt connection to connect their CRM with WhatsApp in order to solve these difficulties. For each action, including task creation, meeting scheduling, call management, and lead generation, We designed WhatsApp templates. Accordingly, a custom function was created.
- Additionally, We developed a unique PHP page for OTP authentication that was connected with the CRM functionality. Clients and hosts could use WhatsApp OTP to verify themselves when visiting Zoho CRM, which was shared via meeting links.
- We added a button to the lead module that connected to the creator form in order to generate leads. The CRM custom module received a record from the form submission, and vice versa.
- Last but not least, We produced a customized home page with analytics integration and a dashboard that represented the client's particular needs.

SELECTION CRITERIA

- Fast Implementation
- Value of money
- Increase Sales
- Manage Leads
- WhatsApp Automation
- Timely Support



RESULT

The client was able to manage their customer relationships more effectively and have better communication with their customers' thanks to WhatsApp's integration into the CRM system. The client was able to send and receive messages for all activities, use WhatsApp OTP to verify customers and hosts, share attachments, and design a dashboard that was specifically tailored to their needs automatically.

CONCLUSION

Budding Group was able to increase customer relations management and contact with clients by overcoming the obstacles of incorporating WhatsApp into their CRM system. This case study emphasizes the significance of overcoming technology integration obstacles and tailoring solutions to meet unique business needs.

ABOUT

Unicloud IT Services was officially launched in the year 2018 on the 12th of September

Unicloud IT Services is a cloud service provider company. With over total experience of more than 7 years, Unicloud's developers are committed to providing dedicated services for ZOHO products to its clients. Unicloud has a high rate of client retention and successful deliveries. We have more than 4000+ customers to whom we have provided the services and been providing support.

Unicloud has completed 897+ Projects along with more than 4000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.

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