



Client Name : Raman Sharma

Country : India

Users : 9

Subscription : Zoho CRM & Forms



ABOUT:

Grab My Visa is a trusted consultancy service established in 2017, specializing in providing expert assistance for tourist visa applications to the U.S.A, Canada, New Zealand, Australia, England, and 27 Schengen countries. Since its inception, the company has navigated numerous challenges, consistently maintaining a high standard of 100% transparency for its valued customers. With a focus on simplifying the visa process, Grab My Visa aims to make international travel more accessible and hassle-free for everyone. With a personalized approach, Grab My Visa helps every client with a free profile assessment, tailoring advice based on individual requirements.

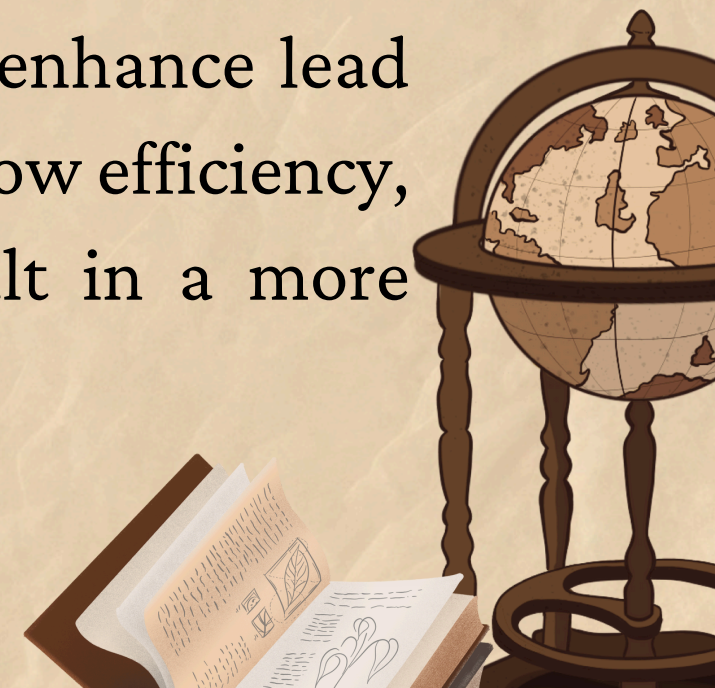


PROJECT OVERVIEW:

Grab My Visa Immigration is a leading consultancy that assists clients with visa processing for various countries, including the U.S., Canada, Australia, and more. With a growing customer base and increasing operational complexity, they sought to improve their Zoho CRM to better manage ticket creation, lead conversion, deal tracking, and customer interactions. Unicloud IT Services was brought on board to provide custom solutions that would address these operational issues and improve overall processes.

PROJECT OBJECTIVE:

The primary goal of this project was to help Grab My Visa Immigration use Zoho CRM to improve business operations, reduce manual entry, eliminate data duplicates, improve customer service, and enhance lead conversion. By implementing a customized CRM solution, the objective was to improve workflow efficiency, ensure data accuracy, and provide easy access for the team. This would ultimately result in a more responsive, data-driven operation that could scale with the growing business needs.



CHALLENGES

Grab My Visa Immigration faced several operational challenges within their Zoho CRM setup, primarily related to ticket creation and management, duplicate data entries, and the manual handling of lead and deal management processes. The company struggled with inefficiencies in tracking client inquiries and managing tickets, leading to delays in response times. Additionally, the manual entry of client data resulted in frequent duplicate records, causing confusion and inconsistencies. Lead and deal management was also time-consuming and prone to error, as there was no automation to ensure timely follow-ups and updates, resulting in missed opportunities.

SOLUTION

To address these challenges, Unicloud IT Services implemented a range of custom solutions within Zoho CRM. They introduced custom modules tailored to Grab My Visa's specific business processes, allowing for better data management and more efficient operations. Automation workflows were set up to manage lead and deal processes, reducing manual intervention and ensuring timely follow-ups. Blueprint processes were implemented to standardize customer interactions and visa application workflows, enhancing consistency and accountability. These solutions helped eliminate duplicates, improve ticket management, and automate repetitive tasks, ultimately improving operational efficiency and customer satisfaction.

FUNCTIONALITY AND FEATURES:

- **Custom ‘Tickets’ Module:** A tailored module for managing customer support tickets, integrated with blueprint workflows for better ticket creation and management alongside deals.
- **IVR Integration:** Integrated IVR (Interactive Voice Response) system for calls, automatically storing call recordings in Zoho CRM to facilitate better communication.



- **Duplicate Prevention:** A unique ID system to prevent duplicate lead entries, integrated directly with Grab My Visa's website for more accurate data input.

- **Lead Automation:** Automated task creation when a lead is generated, with lost leads stored in a separate module for future re-engagement.
- **Zoho Forms Integration:** Automated data entry from Zoho Forms, allowing customer details to be directly entered into Zoho CRM for better follow-up management.
- **Custom Reports and Dashboards:** Created customized reports and dashboards to provide detailed insights into lead conversion, ticket resolution, and other key metrics.
- **Payment Automation:** Added fields to track payments, including cash, online, and cheque payments, with automated reminders and notifications for payment statuses.



- **Lead Capture from LinkedIn and Instagram Ads:** Integrated automatic lead capture from LinkedIn and Instagram ads into Zoho CRM to ensure all marketing leads were tracked.



- **Mobile CRM Setup:** Optimized Zoho CRM's mobile app to give Grab My Visa's team the ability to manage leads, tasks, and communications while on the go.



CONCLUSION

Unicloud IT Services successfully supported Grab My Visa Immigration in optimizing their Zoho CRM Professional Plan to handle their growing operational needs. The solutions provided have enhanced their ticket management, lead handling, and overall business efficiency. As Grab My Visa Immigration continues to expand, Unicloud IT Services will remain engaged, ready to assist them in scaling their operations, including potential migration to Zoho One should the Professional Plan no longer meet their evolving needs.



ABOUT US

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.

