



Zoho
Premium
Partner

GENDER GP

Client: Jack Webberley

Country: United Kingdom

Subscription: ZOHO One

Total Users: 15



Gender 




ABOUT GENDER GP

GenderGP is a global organization dedicated to supporting the health and wellbeing of transgender and non-binary individuals. The team comprises highly skilled professionals, including doctors, nurses, counselors, and therapists, all selected for their expertise in gender-related healthcare. GenderGP provides personalized recommendations and services through telemedicine, breaking down barriers related to geography and socio-economic status. They work independently and collaboratively with patients' doctors to offer flexible healthcare options, ensuring care is accessible and affordable.



PROJECT OVERVIEW

This project aims to enhance operational efficiency, customer satisfaction, and financial management by utilizing Zoho applications. By automating internal processes and incorporating Zoho's tools, we will simplify operations, improve customer interactions, and optimize payment and subscription management. The overall goal is to create a more efficient, responsive, and financially effective system that improves both our internal workflows and customer experiences.





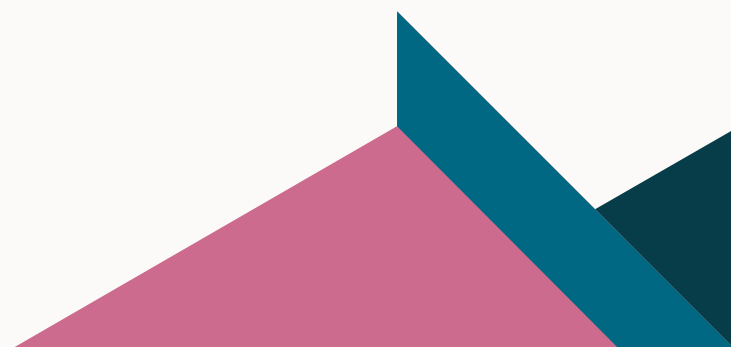
PROJECT OBJECTIVE

Our project objective was to enhance GenderGP's client experience and operational efficiency by implementing a range of Zoho solutions. This includes developing a customized customer portal in Zoho Creator, automating email communications in Zoho CRM, and utilizing Zobots in SalesIQ to improve customer support. We also aim to set up Zoho Bookings with Google Hangouts for scheduling and video conferencing, integrate Stripe for secure online payments, and synchronize Zoho Billing with Stripe for efficient subscription management. Additionally, we plan to create Zoho Creator applications for tracking and analyzing chat transcripts and appointment data to ensure thorough monitoring and insight.



CHALLENGES

Throughout this project, we encountered several challenges that needed careful consideration and innovative solutions. Customizing the customer portal to meet GenderGP's specific requirements demanded a deep understanding of their unique needs. Automating email processes in Zoho CRM presented technical hurdles, particularly in handling attachments and ensuring smooth integration with existing systems. Developing effective Zobots required balancing codeless and script-based solutions to maximize service enhancements. Integrating multiple platforms, such as Zoho Bookings with Google Hangouts for video conferencing and Stripe for payments, posed synchronization and compatibility issues. Additionally, creating robust tracking applications for conversations and appointments necessitated efficient data capture and analysis while maintaining system performance.



SOLUTION

To address these challenges, we implemented a series of strategic solutions. We engaged in extensive consultations with GenderGP to tailor the UX/UI of the customer portal to their specific needs. Utilizing Deluge scripts in Zoho CRM, we automated the email process, ensuring timely delivery with attachments. For the Zobots, we developed a combination of codeless bots and script-based bots in SalesIQ, enhancing service interactions. Zoho Bookings was meticulously configured for paid appointments, and its integration with Google Hangouts facilitated smooth video conferencing. We integrated Stripe with Zoho Bookings, Billing, and Checkout to enable secure online payments. The conversation tracking application in Zoho Creator utilized OpenAI APIs to capture chat transcripts and generate insightful summaries, identifying frequent questions to improve client services. Lastly, the appointment tracking application was developed to efficiently monitor and manage client appointments, ensuring better resource allocation and client satisfaction.



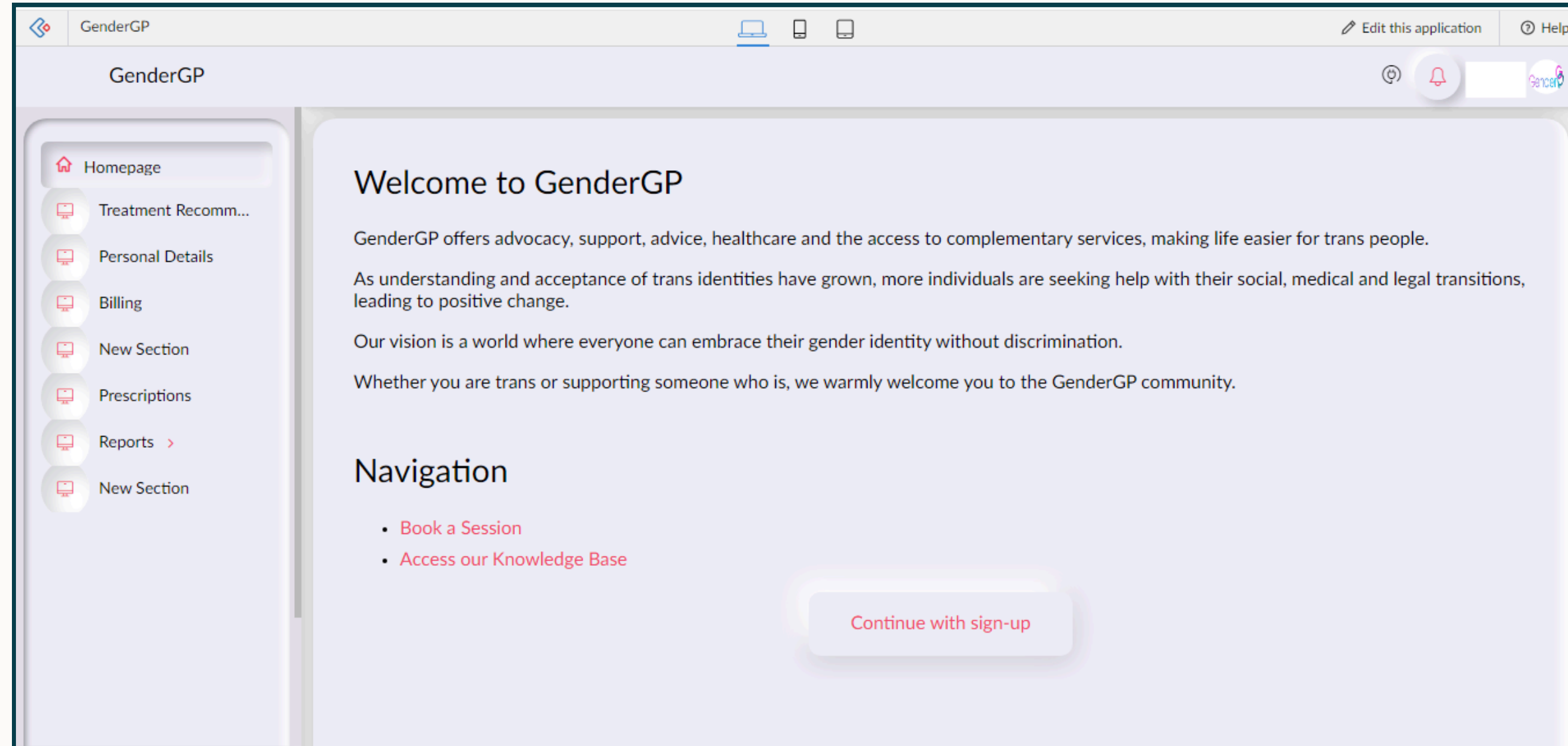
FUNCTIONALITY & FEATURES

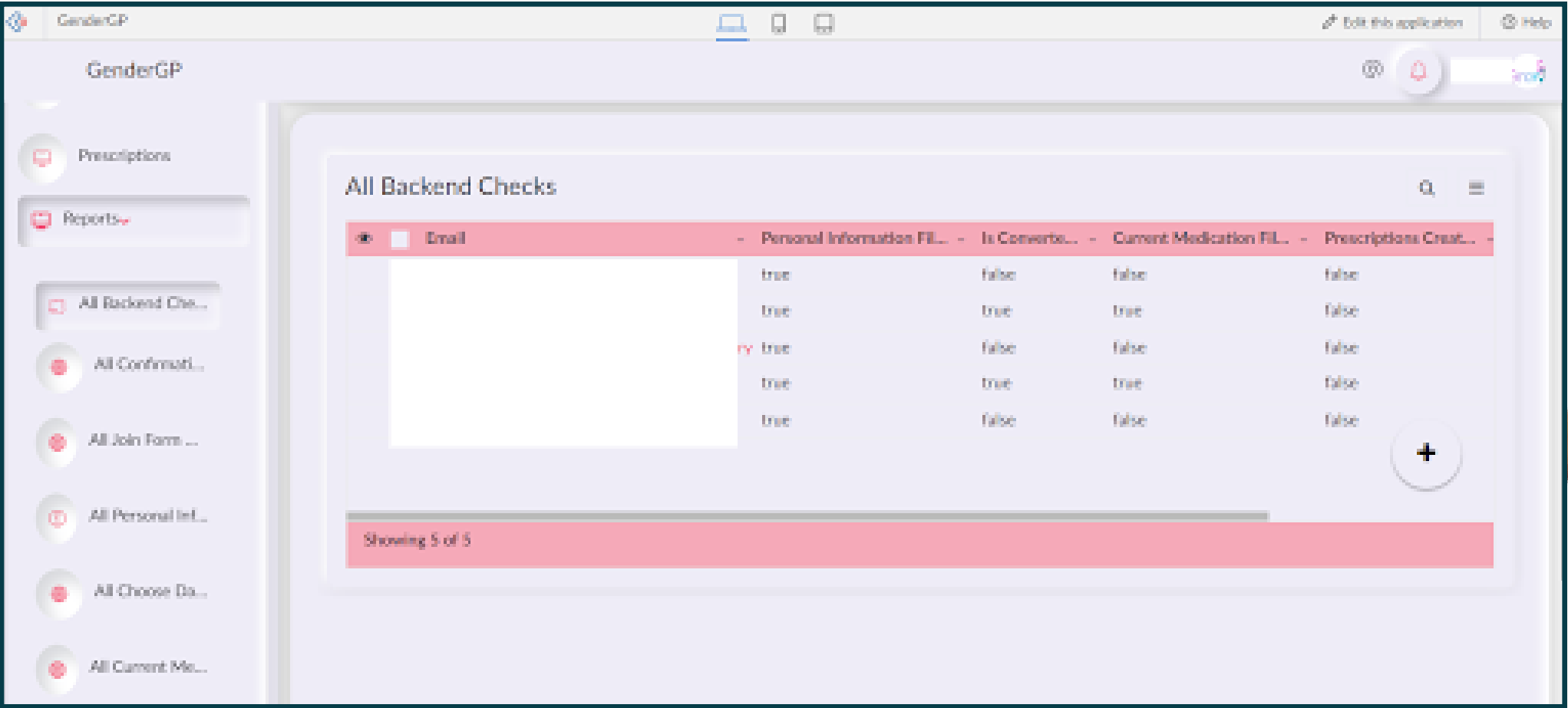
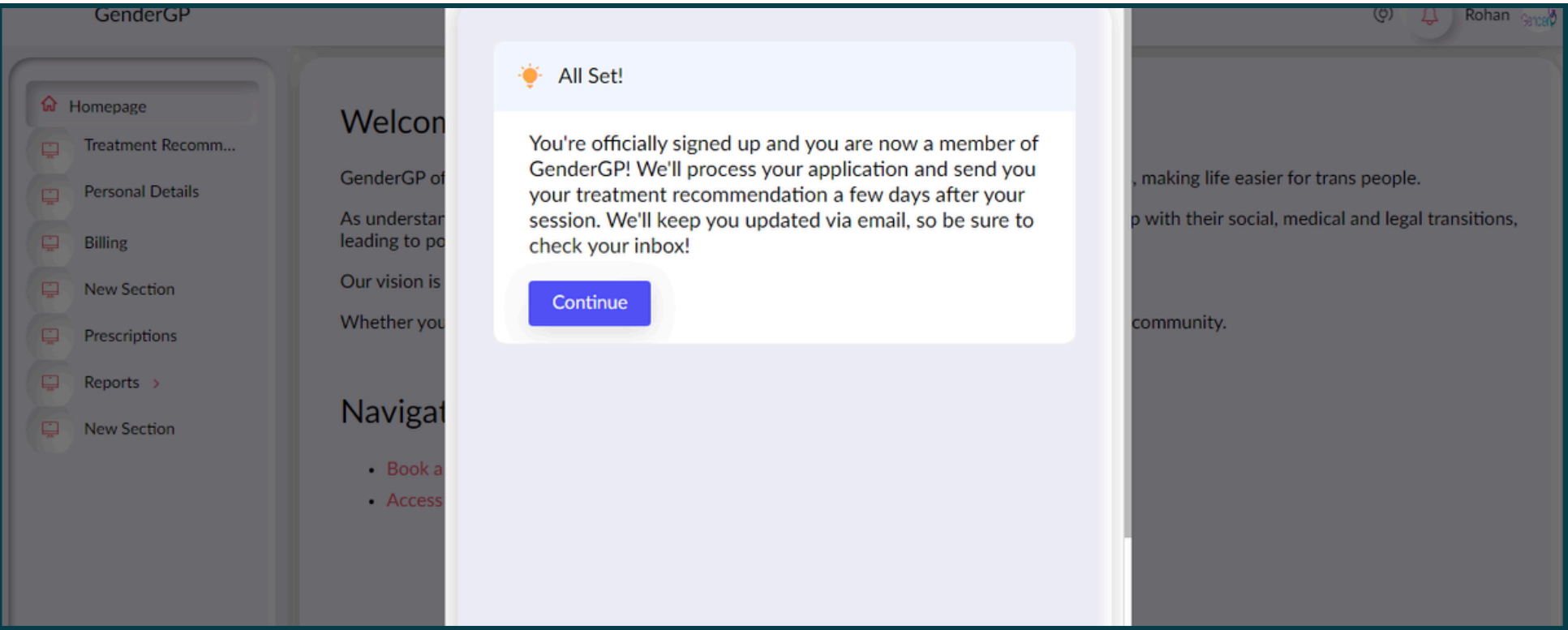
The functionality and features of this project encompass a wide array of enhancements designed to improve client experience and operational efficiency. The customer portal in Zoho Creator offers a user-friendly interface with a tailored UX/UI, ensuring better client engagement. Automated email dispatch within Zoho CRM, using Deluge scripts, improved communication processes and ensures timely interactions. The development of Zobots in SalesIQ, both codeless and script-based, enhances customer support and interaction capabilities. Zoho Bookings is configured for paid appointments and integrates smoothly with Google Hangouts, simplifying scheduling and video conferencing. Stripe integration with Zoho Bookings, Billing, and Checkout provides secure and improved online payment processing. Additionally, a conversation tracking application in Zoho Creator captures and analyzes visitor chats, utilizing OpenAI APIs to generate summaries and identify frequent questions to enhance client services. Finally, an appointment tracking application efficiently monitors and manages client appointments, leading to improved resource allocation and client satisfaction.



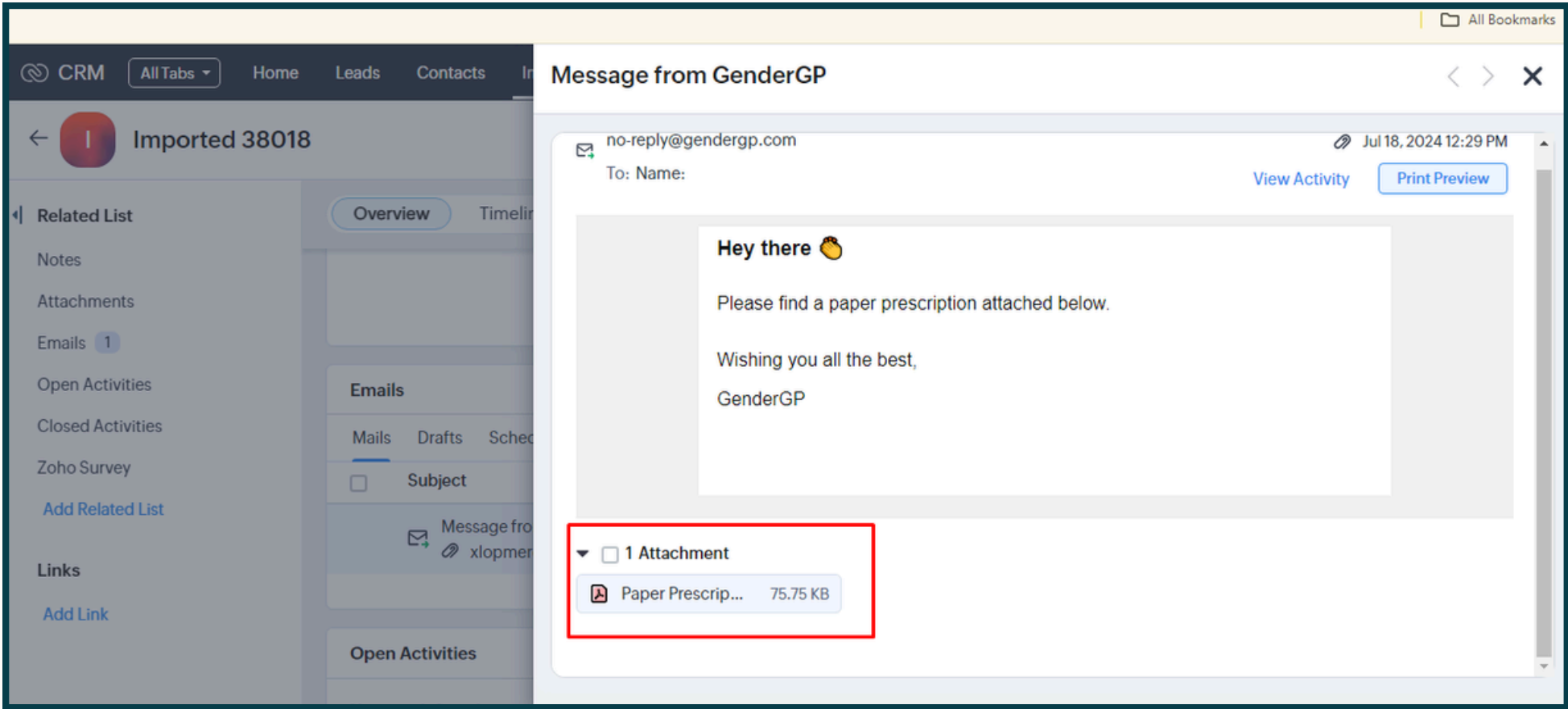
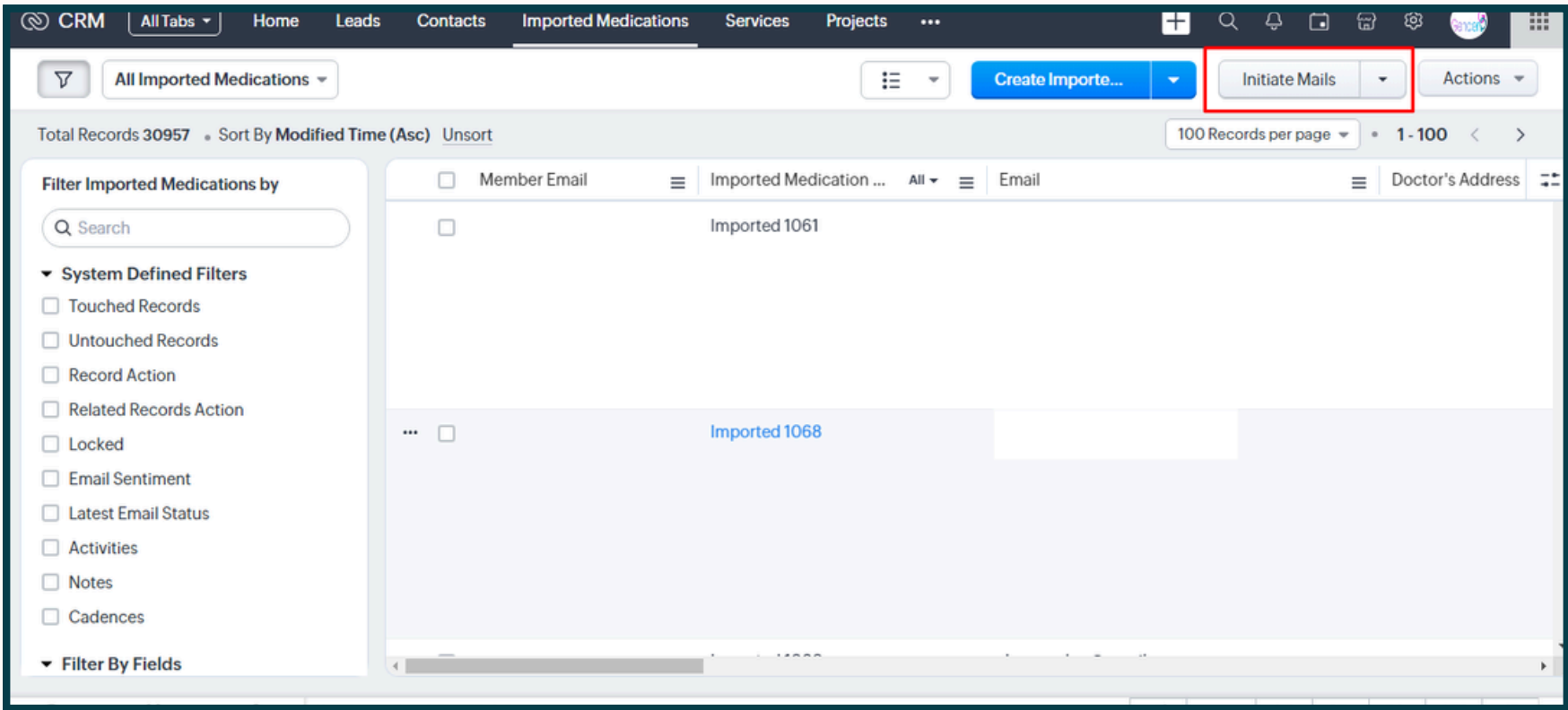
CUSTOMER PORTAL IN ZOHOCREATOR

- User-friendly interface tailored to client-specific needs.
- Enhanced UX/UI for better client engagement.





AUTOMATED EMAIL SENDING PROCESS

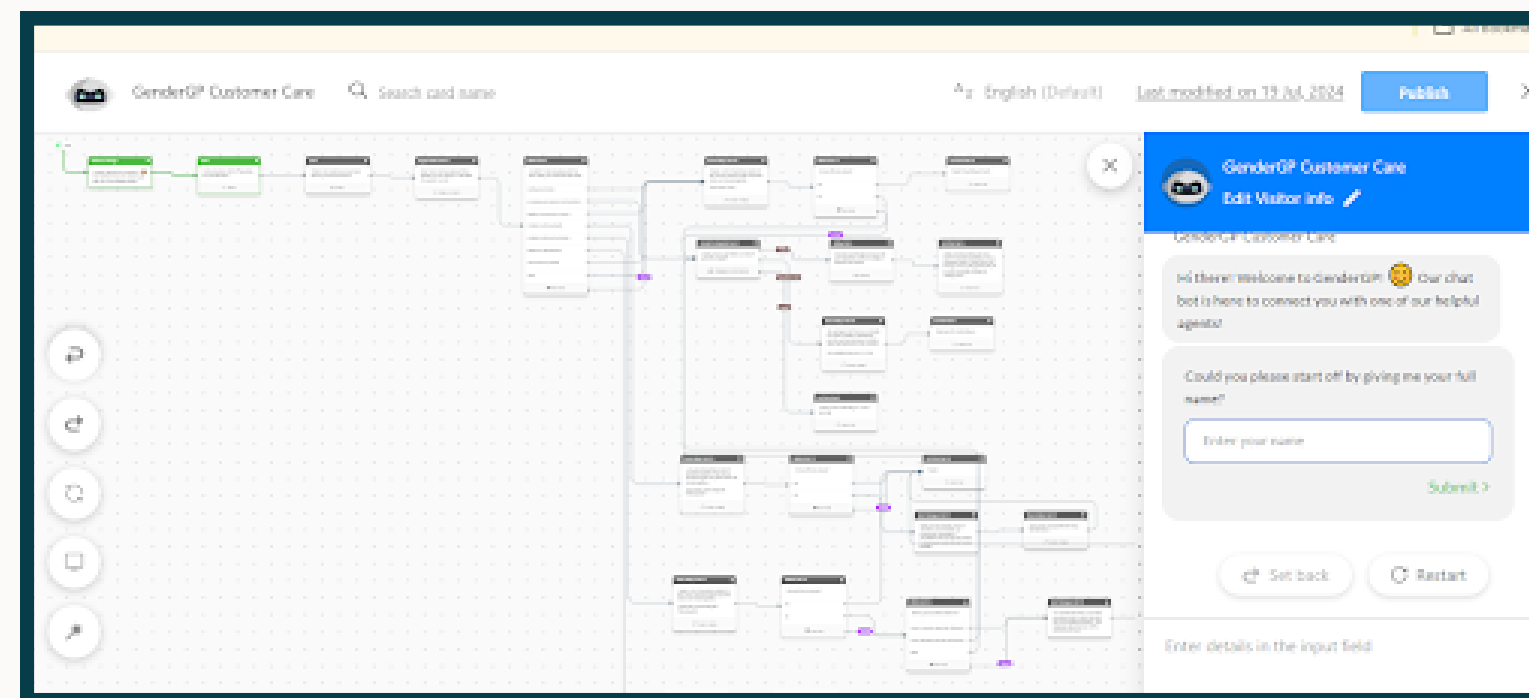
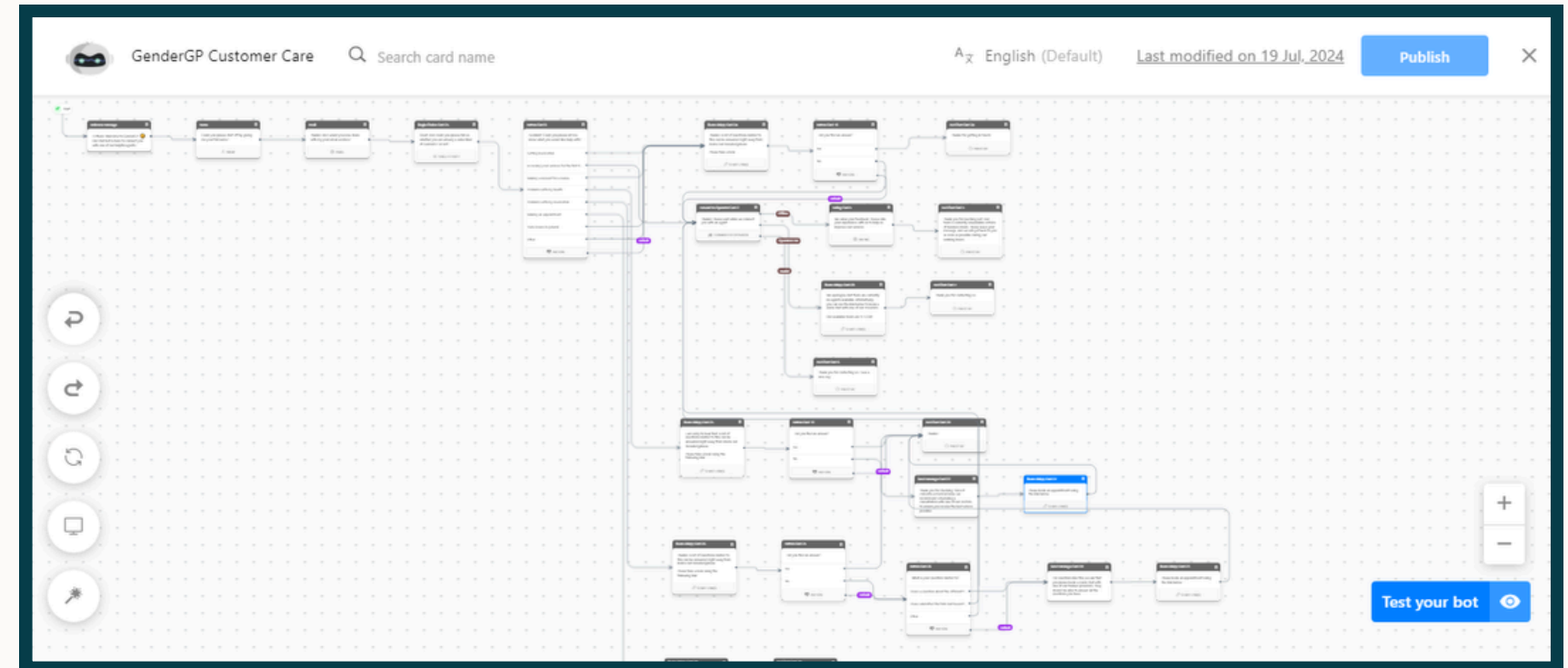


AUTOMATED EMAIL SENDING PROCESS

- Automated email dispatch with attachments using Deluge scripts in Zoho CRM.
- Streamlined communication process ensuring timely interactions.

ZOBOTS IN SALESIQ

- Development of codeless bots and script-based bots for enhanced service.
- Improved customer support and interaction capabilities.



ZOHO BOOKINGS SETUP

- Configuration for paid bookings with smooth integration of Google Hangouts.
- Simplified scheduling and video conferencing process.

STRIPE INTEGRATION

- Secure integration with Zoho Bookings, Billing, and Checkout.
- Streamlined online payment processing.

CONVERSATIONS TRACKING APPLICATION

- Application in Zoho Creator to track and analyze visitor chats.
- Chat transcripts captured and summarized using OpenAI APIs.
- Identification of frequent questions to enhance client services.

APPOINTMENT TRACKING APPLICATION

- Efficient monitoring and management of client appointments.
- Improved resource allocation and client satisfaction.



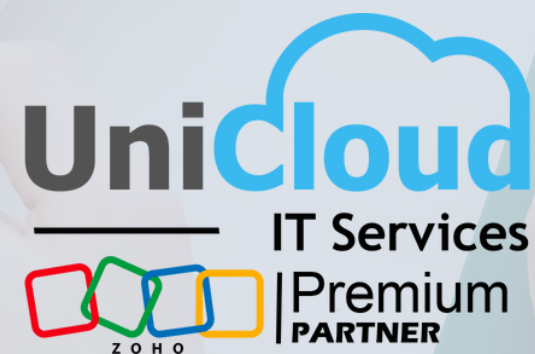
CONCLUSION

By overcoming the challenges through tailored solutions, this project successfully enhanced GenderGP's client experience and operational efficiency. The customized customer portal, automated email processes, and advanced Zobots have significantly improved customer interactions. The integration of Zoho Bookings with Google Hangouts and Stripe has ease the scheduling and payment processes. The conversation and appointment tracking applications have provided valuable insights, helping to refine client services. Overall, the implementation of these features has resulted in a more efficient, responsive, and financially effective system, benefiting both internal workflows and customer experiences.



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.



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