

Centralising Customer Management & Support Operations with Zoho One

CUSTOMER OVERVIEW

PT Ecological Services Pvt. Ltd. is an environmental services company headquartered in Mumbai, with approximately 70 employees. The company was previously using a Custom ERP system to manage its business operations. To improve customer relationship management, service tracking, and data centralisation, the company implemented Zoho applications with AGSuite Technologies.

Locations
Mumbai, India

Industry
Environmental Services

Application Replaced
Custom ERP

Product Implemented
Zoho CRM and Zoho Desk

Project
Zoho One Implementation

Employee Count
70

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BUSINESS CHALLENGES

The company faced several operational challenges due to limitations in its existing system:

- **Lack of Database Tracking:** No proper system to maintain and track customer and business information.
- **No Ticket Management System:** Absence of a structured ticketing system to manage and monitor customer queries and service requests.
- **Scattered Lead Data:** Information from multiple lead sources was not centralised, making lead tracking and management difficult.
- **Multi-Company Desk Management:** Managing customer support operations across multiple companies was challenging due to the absence of a centralised support platform.



SOLUTION IMPLEMENTED

After understanding the company's operational requirements, AGSuite Technologies implemented Zoho CRM and Zoho Desk under the Zoho One ecosystem.

The implementation focused on addressing the limitations of the previous Custom ERP system by introducing dedicated applications for customer relationship management and customer support operations.



1. Zoho CRM – Customer & Lead Management

Zoho CRM was introduced to provide a structured environment for managing customer information and lead-related activities.

- Centralised customer and lead database.
- Consolidated lead information from multiple sources.
- Structured customer record management.
- Improved visibility into lead and customer information.
- Better organisation of customer-related activities.

2. Zoho Desk – Customer Support Management

Zoho Desk was implemented to introduce a dedicated platform for managing customer queries and support requests.

- Centralised ticket management.
- Structured recording of customer support requests.
- Better visibility into ticket status and support activities.
- Centralised customer support management.
- Support for managing multiple companies through the platform.

BUSINESS IMPACT/KEY BENEFITS

- **Centralised Customer Information**

Established a dedicated platform for maintaining and accessing customer and lead information.

- **Improved Lead Visibility**

Brought lead information from different sources into a structured CRM environment.

- **Structured Ticket Management**

Introduced a dedicated system to record and manage customer queries and service requests.

- **Multi-Company Support Management**

Enabled a centralised approach to managing customer support activities across multiple companies.

- **Organised Business Operations**

Replaced fragmented customer and support management practices with dedicated business applications.

WHY AGSUITE TECHNOLOGIES

AGSuite Technologies helped PT Ecological Services Pvt. Ltd. transition from its existing Custom ERP system to Zoho applications under Zoho One.

- Expertise in Zoho CRM and Zoho Desk implementation.
- Understanding of business-specific operational requirements.
- Centralised business process management using Zoho applications.
- Integrated approach to customer relationship and support management.

CONCLUSION

With the implementation of Zoho CRM and Zoho Desk under Zoho One, PT Ecological Services Pvt. Ltd. established a more structured approach to customer database management, lead tracking, and customer support operations.

The solution helped address key limitations of the previous Custom ERP system by bringing customer information and support processes onto a centralised platform.

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