

Transforming Customer Data Management with Zoho CRM

CUSTOMER OVERVIEW

DigitiseIT India Pvt. Ltd. is a Pune-based engineering consulting company with approximately 78 employees. The organisation required a more structured approach to managing customer and business-related information, which was previously maintained in Excel spreadsheets. To address this requirement, AGSuite Technologies migrated the existing data from Excel and implemented Zoho CRM, providing a centralised platform to manage customer information and support the organisation's CRM requirements.

Locations
Pune, India

Industry
Engineering Consulting

Application Replaced
Excel

Product Implemented
Zoho CRM

Project
Excel to Zoho CRM Migration & Implementation

Employee Count
78

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BUSINESS CHALLENGES

The company required a more structured approach to managing its sales activities, lead information, and regional business performance.

1. Spreadsheet-Based Data Management: Customer and business-related information was maintained in Excel, creating a need for a more structured management system.

2. Data Migration Requirement: Existing information needed to be migrated from Excel into a centralised CRM platform.

3. Centralised Customer Information: The organisation required a common platform to maintain and access customer-related information.

4. Structured CRM Management: The organisation needed a standard CRM implementation to support its customer relationship management requirements.

5. Improved Data Organisation: Moving from spreadsheets to a dedicated CRM solution was necessary to establish a more organised approach to managing business information.

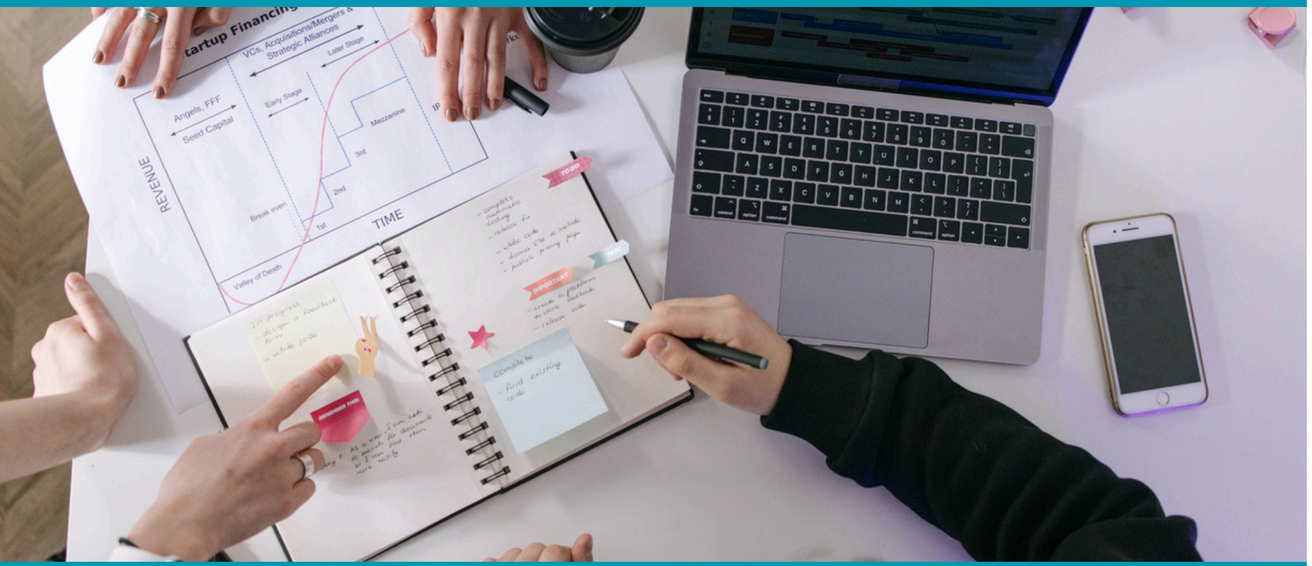


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SOLUTION IMPLEMENTED

AGSuite Technologies supported DigitiseIT India Pvt. Ltd. in transitioning from Excel-based data management to Zoho CRM. The implementation involved migrating existing records, configuring the CRM platform, and centralising customer information to establish a more structured and organised approach to customer relationship management.



1. Zoho CRM Implementation: Implemented and configured Zoho CRM to provide a dedicated platform for managing customer information and supporting the organisation's CRM requirements.

2. Excel Data Migration: Migrated existing records from Excel spreadsheets into Zoho CRM, bringing previously maintained information into a centralised system.

3. Centralised Information Management: Consolidated customer-related information within Zoho CRM, making records easier to access, organise and manage.

4. Structured CRM Setup: Established a standard CRM setup to support consistent customer data management and provide a unified platform for business information.

BUSINESS IMPACT/KEY BENEFITS

- **Centralised Customer Information:** Consolidated customer-related data within Zoho CRM.
- **Reduced Spreadsheet Dependency:** Transitioned from Excel-based data management to a dedicated CRM platform.
- **Structured Data Management:** Established a more organised system for maintaining business information.
- **Improved Information Accessibility:** Made customer information accessible through a centralised platform.
- **Modernised CRM Management:** Introduced Zoho CRM to support the organisation's customer relationship management requirements.
- **Streamlined Data Handling:** Simplified the management of existing customer information through a unified system.

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WHY AGSUITE TECHNOLOGIES

AGSuite Technologies supported DigitiseIT India Pvt. Ltd. in transitioning from spreadsheet-based data management to a dedicated CRM platform. Through Excel data migration and standard Zoho CRM implementation, AGSuite established a centralised system aligned with the organisation's customer relationship management requirements.

CONCLUSION

The implementation of Zoho CRM enabled DigitiseIT India Pvt. Ltd. to move its existing data from Excel into a centralised CRM platform. The solution established a more structured approach to managing customer information and provided a unified system to support its CRM requirements.

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