



A migration to Salesforce's Sales
Cloud from Zoho CRM

COMPANY PROFILE:

Ikos is a start-up company that aims to take frustration out of the rental process for both landlords and renters. Ikos provides transparency for renters to make informed decisions and helps landlords find qualified renters for their properties. Ikos operates in Pittsburgh and are looking to expand to different territories. They had a unique lead generation process, and needed to record relevant lead information in order to analyze the data and take appropriate action. They operate in both B2B and B2C, where their B2B operations are with landlords and B2C are with the tenants.

THE CHALLENGE:

At the time, Ikos utilized Gmail and Zoho CRM, where they had less than 1,000 records. The challenges that cropped up for Ikos:

- › There was no differentiation between leads and contacts in their CRM- they were just called contacts
- › Segmentation wasn't available in their CRM
- › They weren't able to effectively track deals and opportunities
- › They required comprehensive account information that they were not able to manage in Zoho CRM. They ended up managing account information outside of Zoho CRM
- › They weren't able to track email, calls and in-person meetings
- › They wanted to be able to not only gain deeper insights into their data with reporting but also walk away from the implementation with the ability to customize their reports as business needs change
- › A disjointed hand-off process between their Sales team and Operations Team once a deal was closed

THE SOLUTION:

We started by focusing on implementing a solution with their B2B side of the business (focusing on landlords). The solution we implemented included:

- › Data migration from Zoho to Sales Cloud
- › Incorporated activity tracking
- › Configured Forecasting, Opportunities, Contacts, Accounts and Leads
- › The lead conversion process was configured so that Lead information relating to Landlords were separated into appropriate objects: Opportunity, Account and Contact. For example: The address of the building they were renting would go into the Account object, or the number of units a landlord owns would go under the Opportunity object
- › Gmail integration with [Salesforce.com](https://www.salesforce.com) allowed their Sales team to see insights. Conduct their work directly in their inbox
- › Seamless hand-off from Sales to Operations team with task automation alerting Operations team to initiate next steps after a deal is closed

THE RESULTS:

Ikos can now automate routine tasks and has freed up more time. They can track every touch point they create with their clients. They are able to gather relevant data and analyze their data in a meaningful way. The migration organized data in a way that was intuitive to the Sales and Operations team.

- › Their deal cycle has shortened by 6 days as a result.
- › They have saved 20% of their time with their new system.