

## ZIVELLO®

## CUSTOMER STORIES

## How Zivelo Accelerates Sales &amp; Biz Dev With Copper

We had the pleasure to speak with the fun, talented team of Zivelo (formerly Oak Labs) about how they manage relationships and how they're turning physical retail environments into an online experience.

(P.S. Thanks to their CEO Healey Cypher for his shout-out to Copper in his recent [interview](#) with CNN Money.)



THE ZIVELLO TEAM

## About Zivelo (formerly Oak Labs):

Today **over 93%** of all retail sales still come from in-store purchases, despite the ongoing rise in e-commerce as a viable shopping option.

Originally, **Oak Labs** was born with a vision to transform that 93% of the retail sector by integrating new technology into the in-store retail experience. Technology that has the potential to forever change the way people think about shopping.

"We try to bring the best of online thinking into the physical world. Retail isn't going away anytime soon, but it is undergoing some fundamental changes," says Healey Cypher, Founder and CEO of Zivelo. "Although it's hard to believe in the Valley, ecommerce is only 7% of all retail. But 75% of in-store purchases are influenced by online."

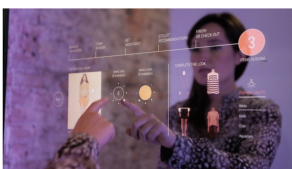
"Customers' expectation for how to engage with the physical world is accelerating rapidly. So we think of the retail experience in a very data-driven manner—similar to that of an online session. Just like the web optimizes the conversion funnel, we find unique moments in the physical store where we can use technology to remove friction."

Zivelo's first product, the *Oak Fitting Room*, aims to solve some of those inefficiencies, beginning with the outdated in-store fitting rooms.

"There's a lot of inefficiency in the fitting room experience today," says Healey. "In fact on average consumers spend 30-40% of their time in fitting rooms waiting... for products, people, or attention."

The Oak Fitting Room is a beautifully designed interactive fitting room mirror that helps shoppers to look for new sizes, colors, availabilities and much more, all while using convenient touch-screen technology.

*"The Oak Fitting Room is the start of revolutionizing the way consumers shop, it creates a beautiful customer experience, empowers sales associates, and brings fresh new data to the retailer that has been lost throughout history,"* adds Healey.



FOUNDED IN MAY 2015, ZIVELLO IS GROWING RAPIDLY IN TERMS OF TEAM SIZE AND PRODUCT OUTPUT, AND PLANS TO LAUNCH OTHER GROUNDBREAKING RETAIL INNOVATIONS IN THE VERY NEAR FUTURE.

## From billboards to advocates.

The Zivelo Team was on a mission to find a CRM that could help them more efficiently manage their client relationships as well as client communications. Since the team is a heavy user of Google Apps, the tight integration was a "must" criteria for them.

"I was looking for the best solution that would automatically both collect and collate, as well as organize all our emails in a single place so we all know what's happening," says Healey.

Unfortunately, none of the other platforms they tried fit the bill... until one fateful day.

"So one day I'm driving out of the office and I looked up and saw this massive billboard that said 'CRM for Google Apps - Copper—it looked amazing!' Healey recalls. The rest was history.

Since that point, Copper has become Healey's favorite tool to manage everything from clients communications to keeping in lock-step up with his team.

"It lets us pick up wherever we left off with any communication. We manage our Business Development Pipeline, our Sales Pipeline, and it's how we stay connected with contact details like phone numbers, and everything else," says Healey. "so we love it. And it's easy because we all have the **Gmail** extension and don't have to leave our inbox."

## A new way to manage complex interactions.

The Zivelo team is constantly reaching out to retailers, industry contacts and managing a growing pipeline. Because of their bi-coastal offices (in New York and San Francisco), it had become increasingly important for them to keep track of all these communication through different channels.

As an enterprise company, selling this line of product to retailers requires extensive cross-functional collaborations within their retail partners' organizations. Starting with high-level executive sponsors and IT teams, Zivelo also engages store managers, regional managers, store associates on the floor, and PR teams. With Copper, they can maintain their extensive records efficiently and stay organized.

*"We talk to dozens of people to get this done, and because we're such a small team, we divide and conquer in our communications. For example, Healey is talking to the executive team, while I'm talking to the PR and marketing team, and other members of our team are talking to other parts of their team so it's super important that we're all on the same page."* - Jenni Samuels, Director of Retail Partnerships at Zivelo

"And with Copper, we're able to visualize the overall map of who our partners are," Jenni continues. "As another example, when Healey adds a contact and Copper automatically updates his last conversation with that person, I'm then able to continue the conversation effortlessly. Copper has been an incredibly helpful tool and has really helped us in a huge way."

## Time to build some sales and BD pipelines.

Enterprise sales involves a great deal of outbound outreach and it's crucial to be able to efficiently keep track of who's doing what, and who's talking to whom. The Zivelo team primarily uses Copper for sales and business development just like any enterprise sales outfit.

In Copper, the Zivelo team sets up **sales pipeline stages** beginning with Initial Contact, then In-Person Meeting, and Due Diligence—where they examine the client's systems to determine how the integration will evolve—and finally Negotiation and Contract.

## Partnerships: one of the most important business accelerators for all enterprise sales.

The *Business Development Pipeline* is used to manage relationships with partners, manufacturers, inventory companies, and every arm of their business.

"We partner with companies in the retail space such as intelligence companies—and they have CRM and POS they use," says Healey. "Then we find a common denominator to accelerate the business and we try to work with them."

Once the Zivelo team begins working with a partner or a client, Jenni then uses Copper to keep track of projects as well as manage the contact details of their enormous tree of clients.

Automated task reminders are another feature that Jenni often uses to follow up with her clients—they also help her manage her own inbox.

*"Copper has helped us be organized and keep conversations much more opened. As a company, we are very much into transparency, such as who's talking to which client, where we can see the status of one deal without having to email, ping, Slack or call each other. When it comes to the ease in which we work together—Copper has saved us a ton of time!"*

Next steps? Zivelo is on its way to revolutionizing the retail industry as well as accelerating their sales and business development efforts by using Copper's deep integration with Google Apps. Exciting!