

addlight

Adding Light Of Automation And Ai
To Scale Your Business.

ADDLIGHT – CASE STUDIES



addlight

Adding Light Of Automation And Ai
To Scale Your Business.

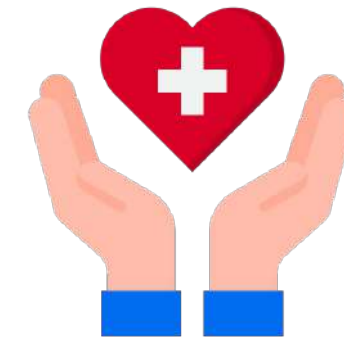
INDUSTRIES



Education



Real Estate



Healthcare



Finance



Hospitality



Insurance



Investment

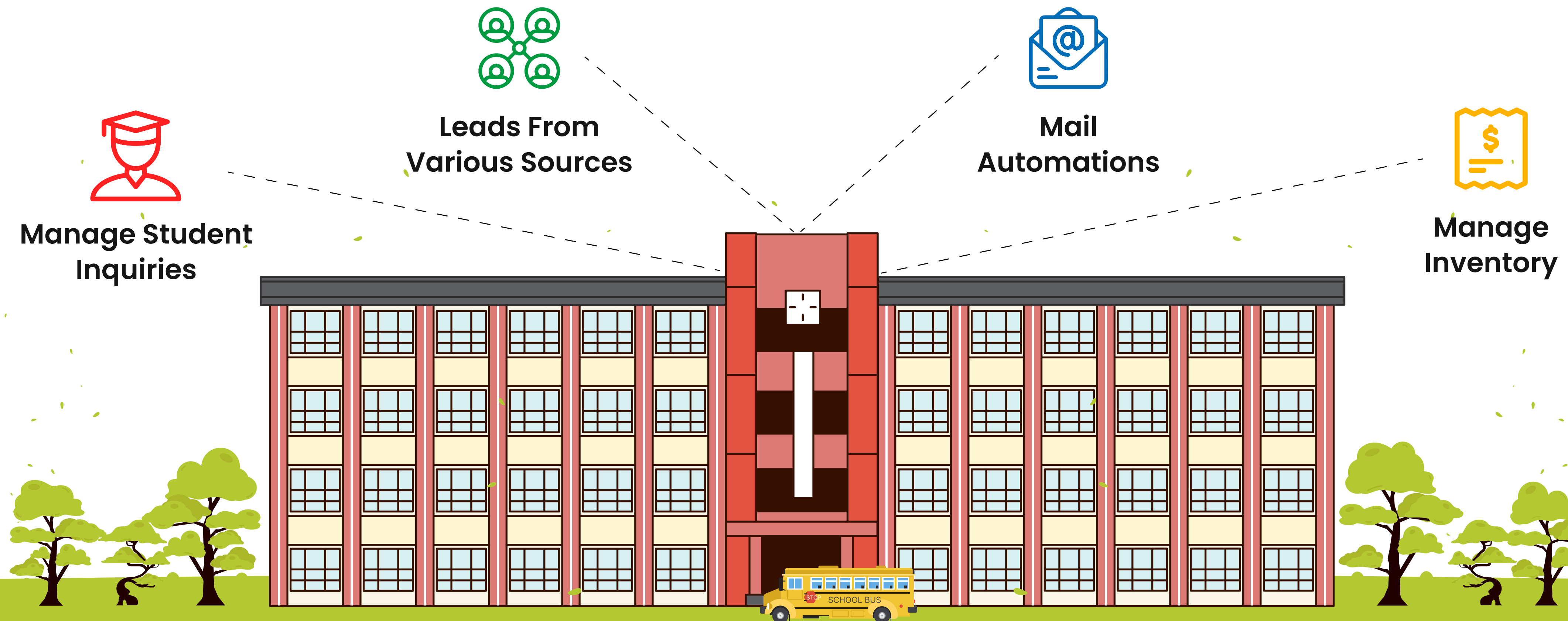


Retail

Case Study 1: School (Industry-Education)

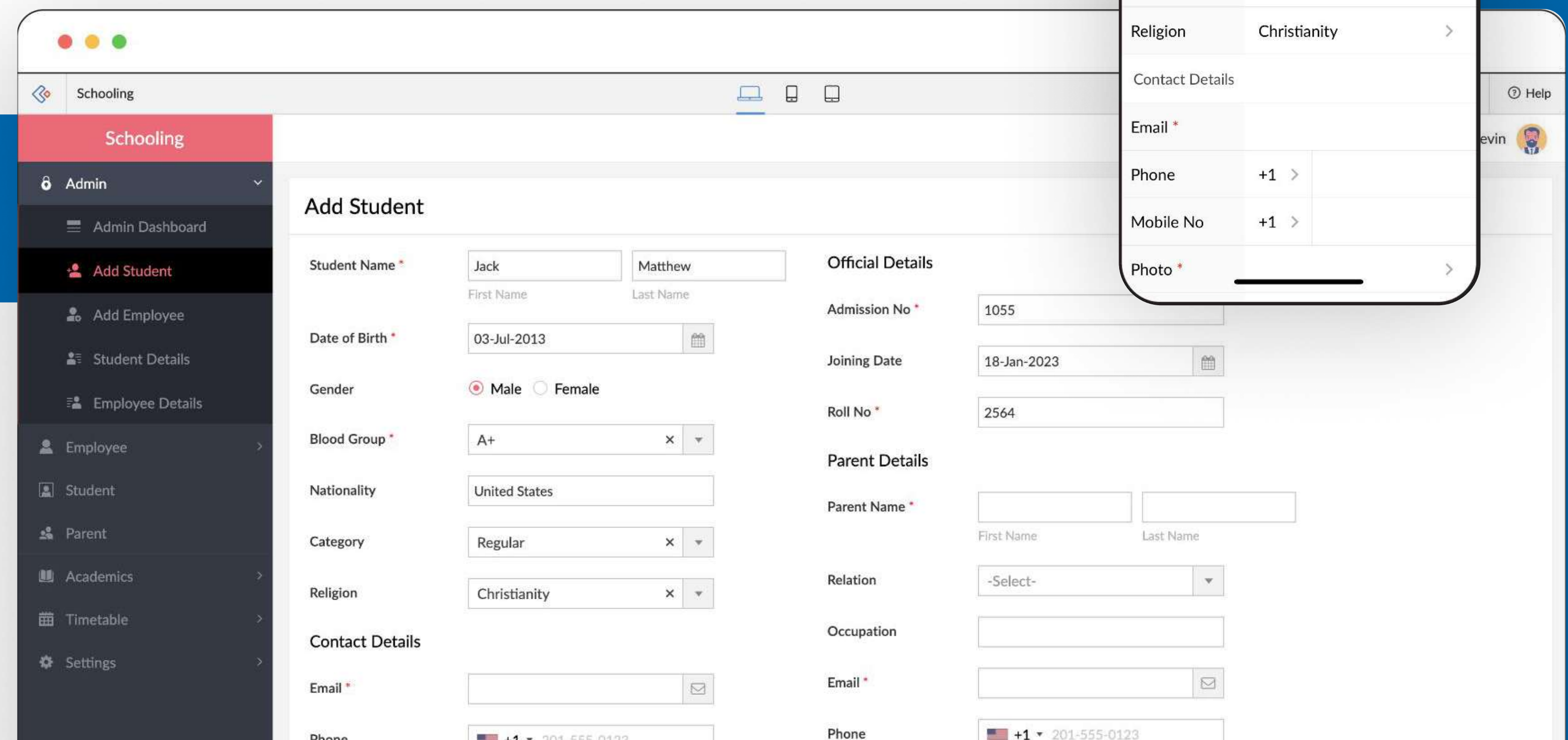
Problem Statement

The School Needed To **Manage Student Inquiries** And **Leads From Various Sources**, Send Course-Wise Brochures And **Mail Automations**, **Handle And Reminders**, And **Manage Inventory**.



Solution

1. Utilized Zoho CRM For **Onboarding Student Leads** From Various Sources.
2. Assigned **Tasks To Users** For Follow-Up Calls And Detailed Lead Information.
3. Created **Multiple Automations** For Tasks And **Reminders Based On Course Selection**.
4. Set Up **Daily Reminders** And Email Workflows For **Fee Follow-Ups** And **Early Bird Offers**.
5. Converted Fee-Submitted Students Into Enrolled Students In The System.
6. Managed Books And Course-Related Documents With Zoho Inventory.



The image displays a desktop screenshot of the Zoho CRM 'Add Student' form and a mobile app interface. The desktop form includes fields for Student Name (Jack, Matthew), Date of Birth (03-Jul-2013), Gender (Male), Blood Group (A+), Nationality (United States), Category (Regular), Religion (Christianity), Admission No (1055), Joining Date (18-Jan-2023), Roll No (2564), Parent Name, Relation, Occupation, Email, and Phone. The mobile app interface shows a simplified version of the 'Add Student' form with fields for Student Name (Jack, Matthew), Date of Birth, Gender (Male/Female), Blood Group (A+), Nationality (United States), Category (Regular), Religion (Christianity), Email, Phone, and Mobile No.

How Addlight Helped Using Zoho One

Streamlined Student Onboarding And Conversion Processes.

1



Provided Automated Follow-Ups And Reminders For Fee Management.

2



Enabled Detailed Reports On Student Interests And Locations.

3



Improved Inventory Management For School Stationery.

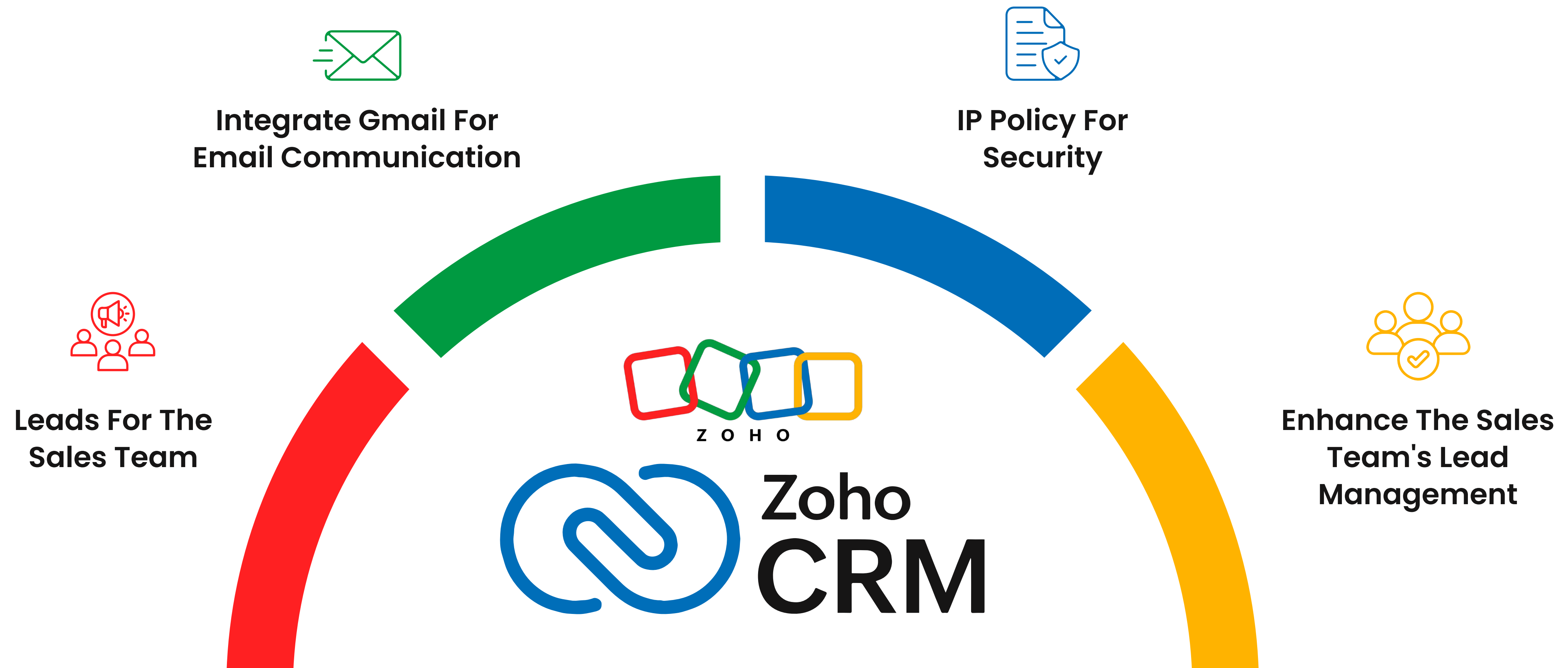
4



Case Study 2: Packaging Material Supplier (Industry-Manufacturing)

Problem Statement

The Company Needed To Effectively Manage And Track Website Visitors And Leads In **Zoho CRM**, Segregate Leads For The Sales Team, Integrate Gmail For Email Communication, Enforce An Allowed IP Policy For Security, And Enhance The Sales Team's Lead Management.



Solution

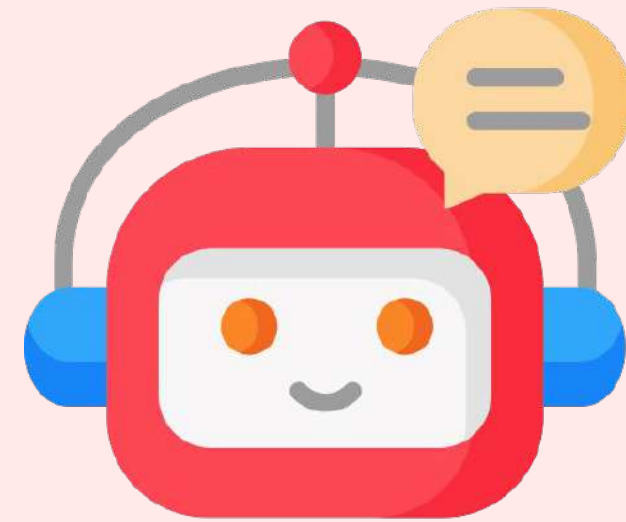
1. Created A **Chatbot In Zoho SalesIQ** With Detailed **Step-By-Step Automation To Nurture Leads**.
2. Integrated **Zoho SalesIQ With Zoho CRM** To Capture All Website Visitors, Including Those Not Engaging Directly.
3. Set Up Lead Nurturing Processes In Zoho SalesIQ, Assigning A Dedicated User For **Excellent Lead Nurturing**.
4. Implemented Automated **Lead Assignment** Based On Product Category In **Zoho CRM** Using **Zoho SalesIQ Automation**.
5. Designed Complex Email Automation Sequences For Various Lead Stages, Including **Welcome Emails, Follow-Ups, And Reminder Emails**.
6. Developed A Complex Blueprint In Zoho CRM To Nurture Leads Through **Accounts, Contacts, And Deal Modules**.
7. Set Up **Monthly Sales Targets And Forecasting Features** In Zoho CRM To **Track And Motivate The Sales Team**.
8. Implemented Competitive **Monthly And Quarterly** Forecasting, Task, And Reminder Automation.
9. Generated Complex Reports And **Analytics** For Detailed **Performance Insights**.



How Addlight Helped Using Zoho One

Automated Lead Nurturing During And After Working Hours Using Chatbot Flows.

1



Provided The Sales Team With Clear Monthly Targets And Revenue Management.

2



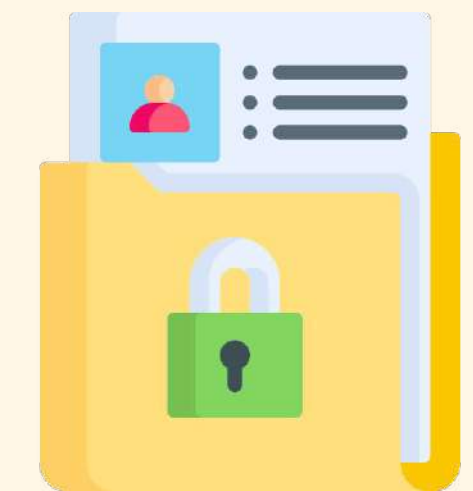
Reduced Workload Through Email Automation And Hard Follow-Ups.

3



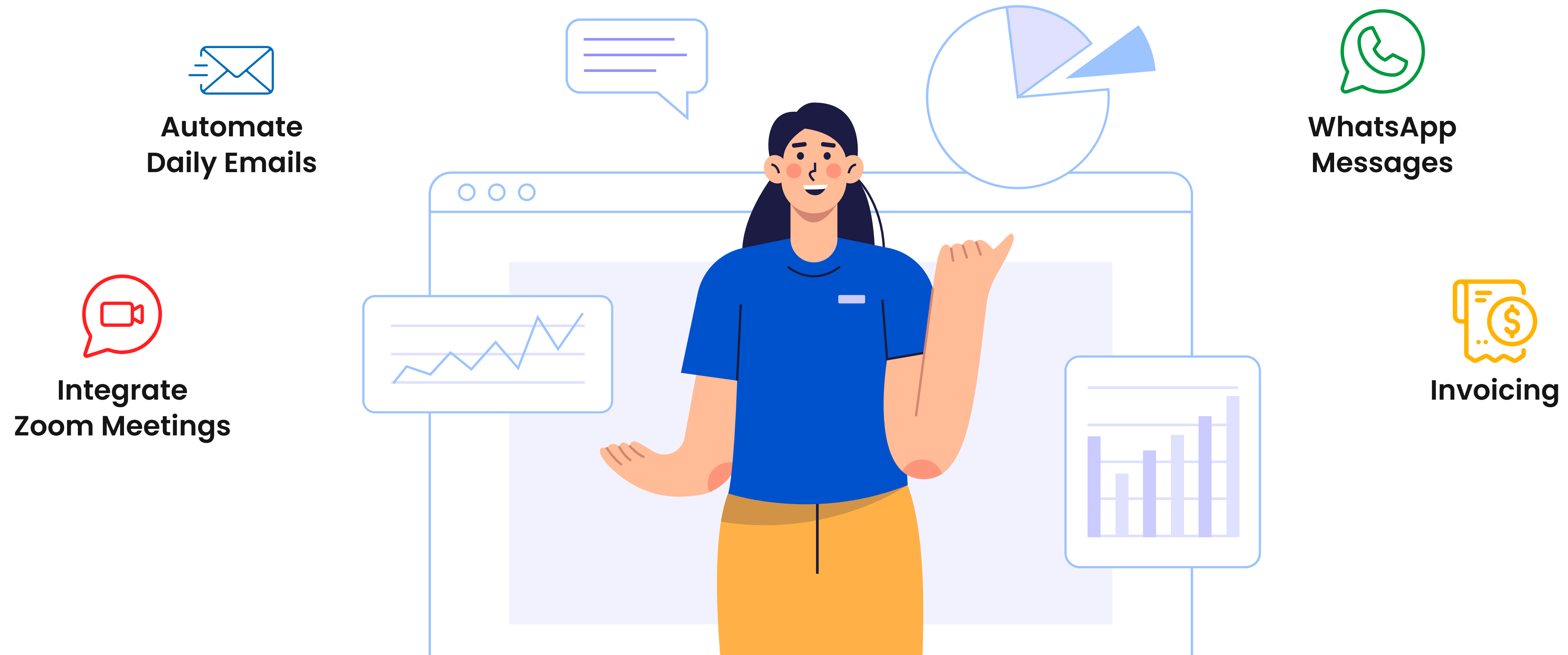
Enhanced Data Security With Allowed IP Policies.

4



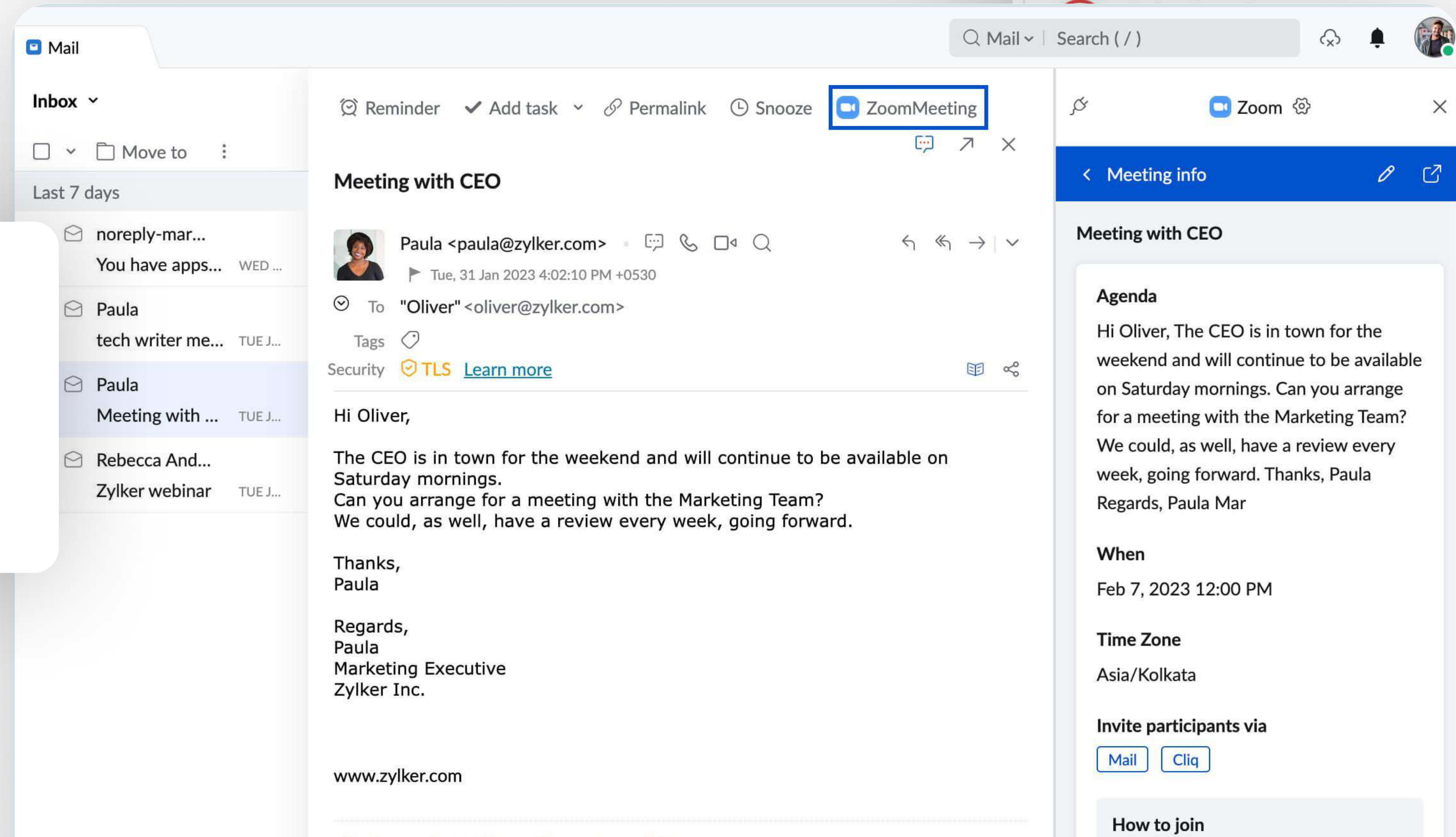
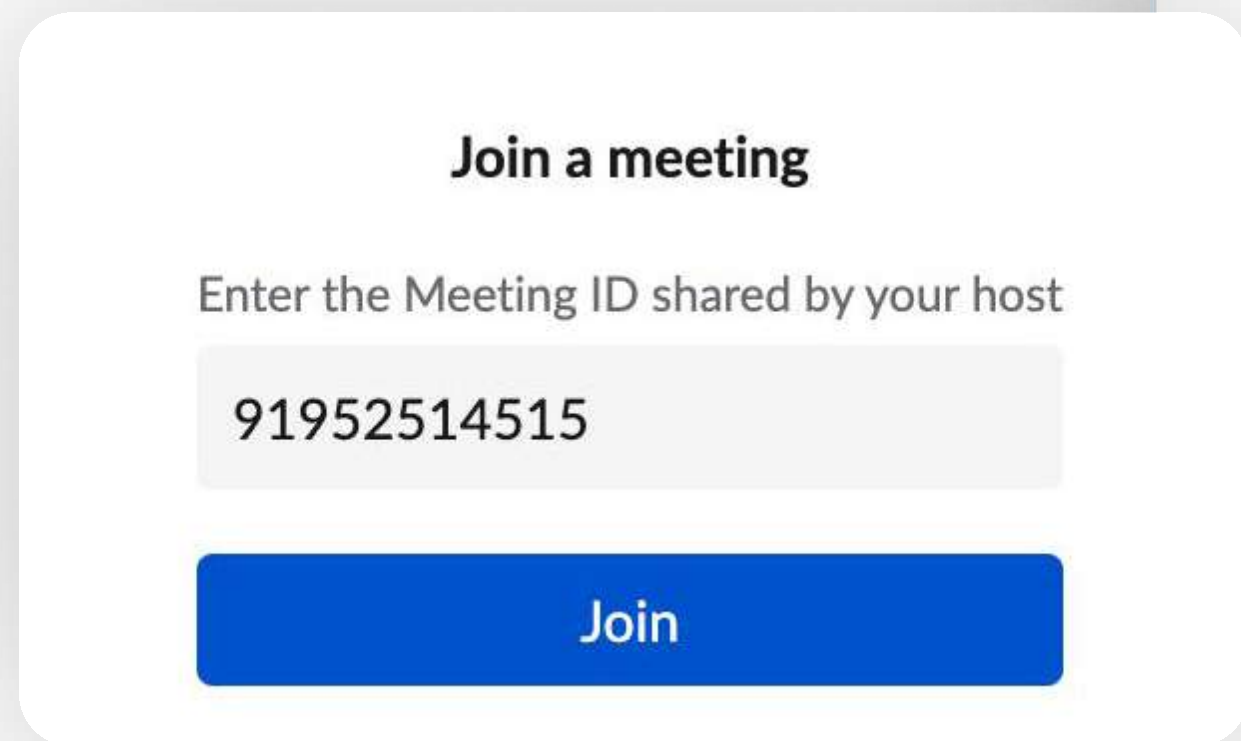
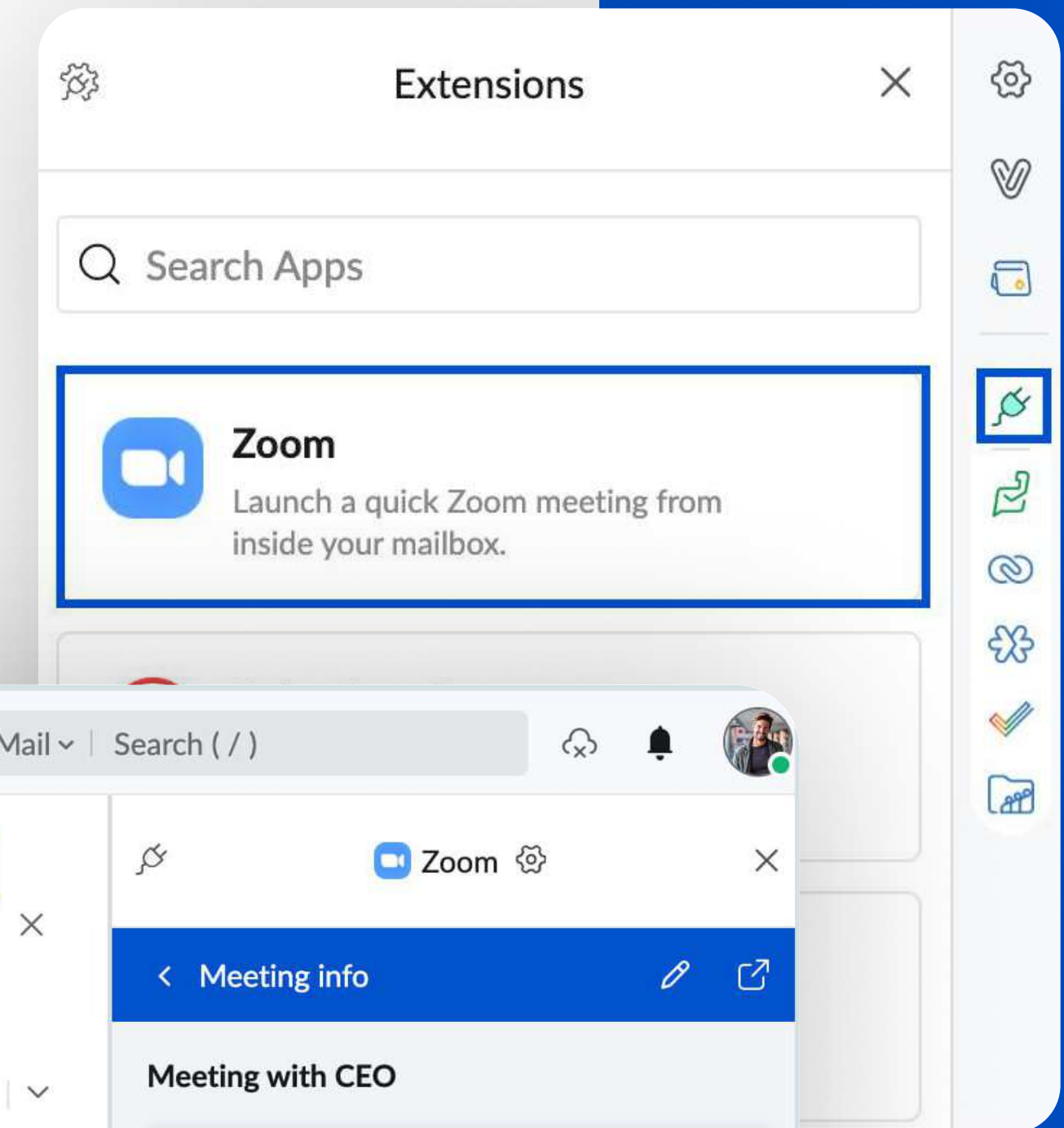
Problem Statement

The Business Coach Needed To Generate Leads From Various Sources, **Integrate Zoom Meetings, Automate Daily Emails And WhatsApp Messages, And Manage Course Purchases And Invoicing.**



Solution

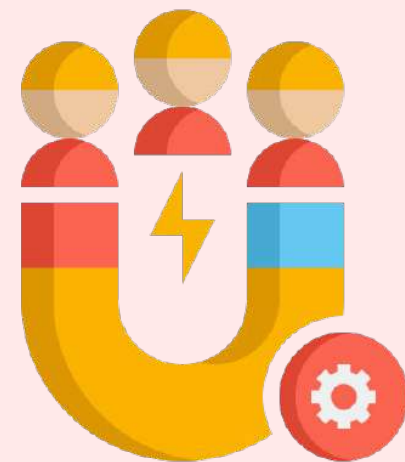
1. Utilized Zoho CRM For Lead Generation From **Various Sources**.
2. Integrated Zoom For **Meeting Scheduling And Updates**.
3. Automated Daily **Emails And WhatsApp Messages**.
4. Managed **Course Purchases And Automatic Invoicing With Zoho Subscription**.



How Addlight Helped Using Zoho One

Enabled Comprehensive Lead Generation And Tracking.

1



Integrated Meeting Scheduling And Updates.

2



Streamlined Email And WhatsApp Automations.

3



Provided Seamless Course Management And Invoicing.

4



Case Study 4: School (Industry-Education)

Problem Statement

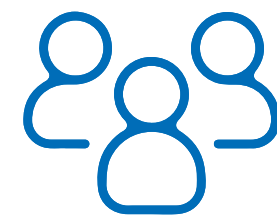
The School Needed To Generate Leads From Various Sources, **Send Automatic Welcome Mails, Automate Brochure** And **Course Information Emails, And Manage City-Wise Lead Tagging.**



City-Wise Lead



Automatic
Welcome Mails



Leads From
Various Sources

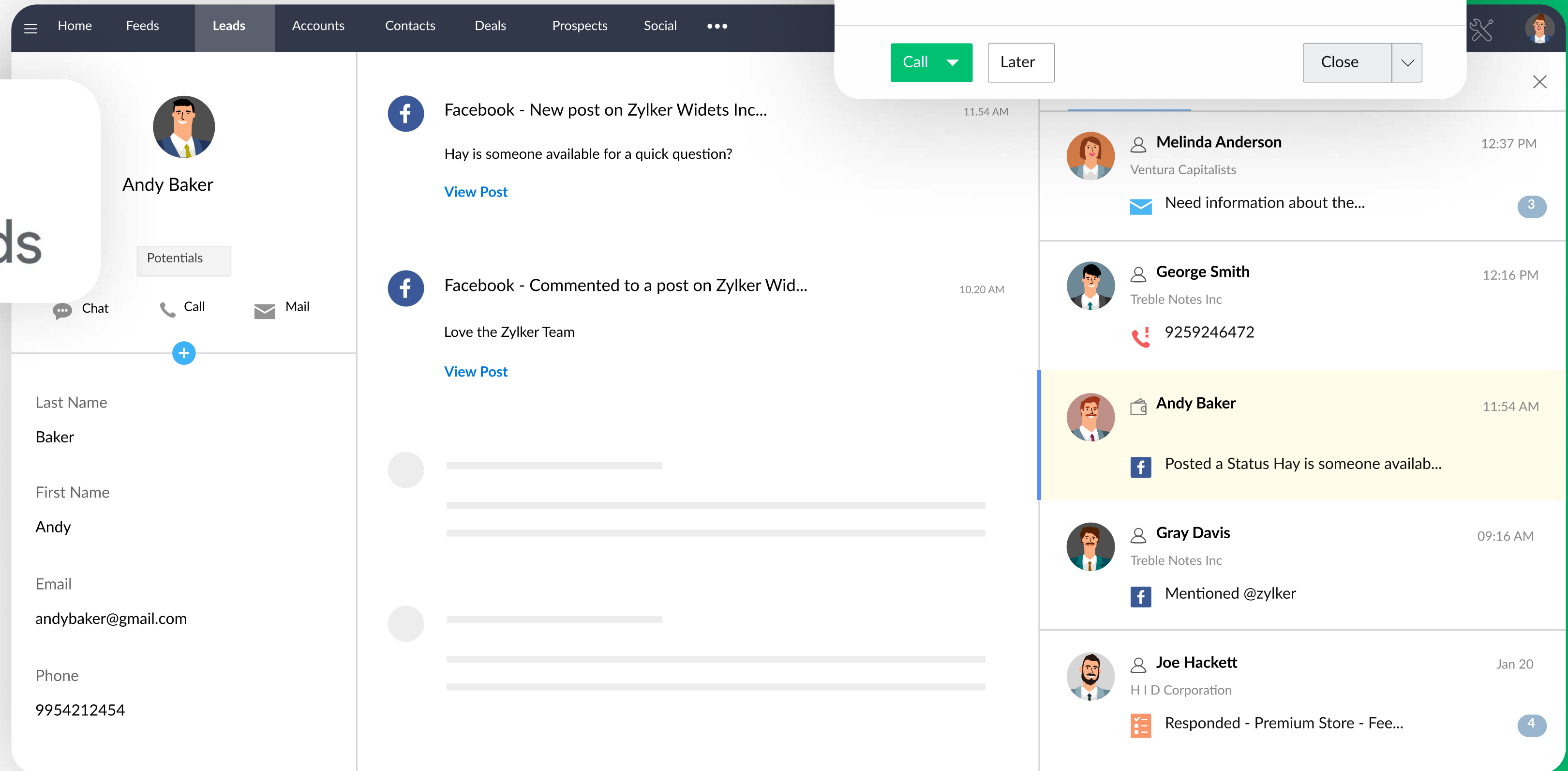
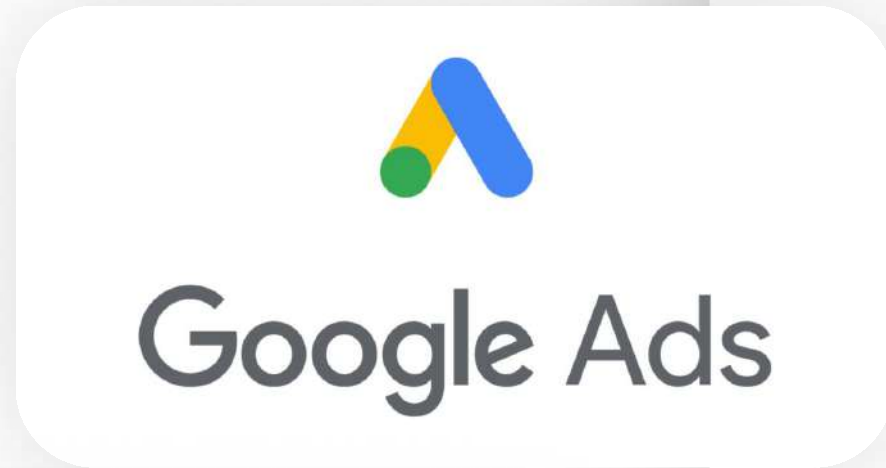


Course Information
Emails



Solution

1. Integrated Zoho Social With Zoho CRM For **Facebook Campaigns**.
2. Utilized **GoogleAds** And **Gupshup** Integrations For **Lead Generation**.
3. Set Up Telephony Integration For **Calling From Zoho CRM**.
4. Automated Email Workflows For Course **Information** And **Follow-Ups**.



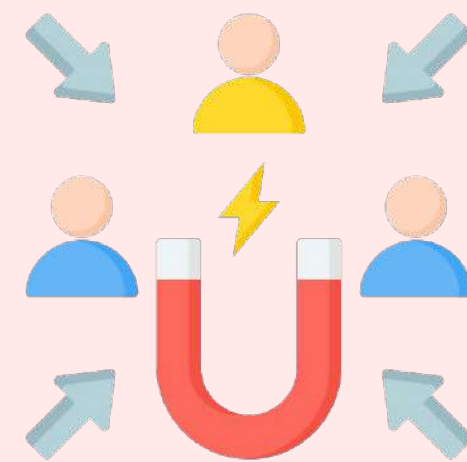
The screenshot displays the Zoho CRM interface with several key components:

- Navigation Bar:** Home, Feeds, Leads, Accounts, Contacts, Deals, Prospects, Social.
- Contact Profile (Andy Baker):**
 - Profile picture and name: Andy Baker
 - Buttons: Potentials, Chat, Call, Mail
 - Fields: Last Name (Baker), First Name (Andy), Email (andybaker@gmail.com), Phone (9954212454)
- Social Media Activity:**
 - Facebook - New post on Zylker Widets Inc... (Hay is someone available for a quick question?)
 - Facebook - Commented to a post on Zylker Wid... (Love the Zylker Team)
- Call Log:**
 - 11:54 AM: Melinda Anderson (Ventura Capitalists) - Need information about the... (3)
 - 10:20 AM: George Smith (Treble Notes Inc) - 9259246472
 - 11:54 AM: Andy Baker - Posted a Status Hay is someone availab...
 - 09:16 AM: Gray Davis (Treble Notes Inc) - Mentioned @zylker
 - Jan 20: Joe Hackett (H I D Corporation) - Responded - Premium Store - Fee... (4)
- Call Action Panel:** A floating window titled "It's time to call." for Melinda Anderson (Ventura Capitalists) with fields for Contact Owner (Quinn Rivers), Email (melinda.a@ventura.com), Phone ((202) 555-0124), Mobile (4083529191), and Department (Purchase). It includes "Call", "Later", and "Close" buttons.

How Addlight Helped Using Zoho One

Streamlined Lead Identification From Multiple Sources.

1



Managed City-Wise Lead Assignments And Course-Specific Automations.

2



Enabled Bulk WhatsApp Messaging.

3



Provided Complex Reports And Analytics For Telecallers And CRM Users.

4



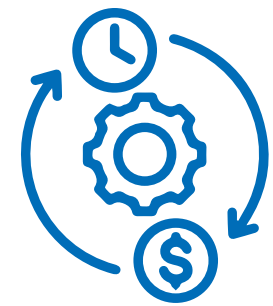
Case Study 5: Commission Based Company (Industry-Stock Exchange)

Problem Statement

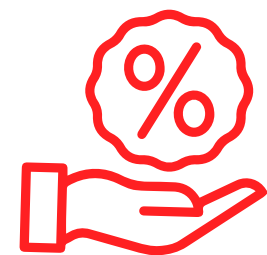
The Company Needed To Track Leads From **Various Sources**, Manage The **Full Trading** And **Manufacturing Cycle**, And Ensure **Accurate Commission** And **Manufacturing Cycle** Tracking.



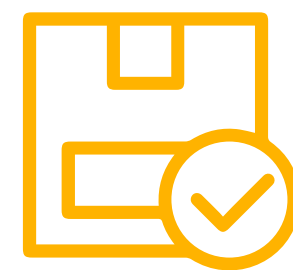
Leads From
Various Sources



Manufacturing
Cycle



Accurate
Commission

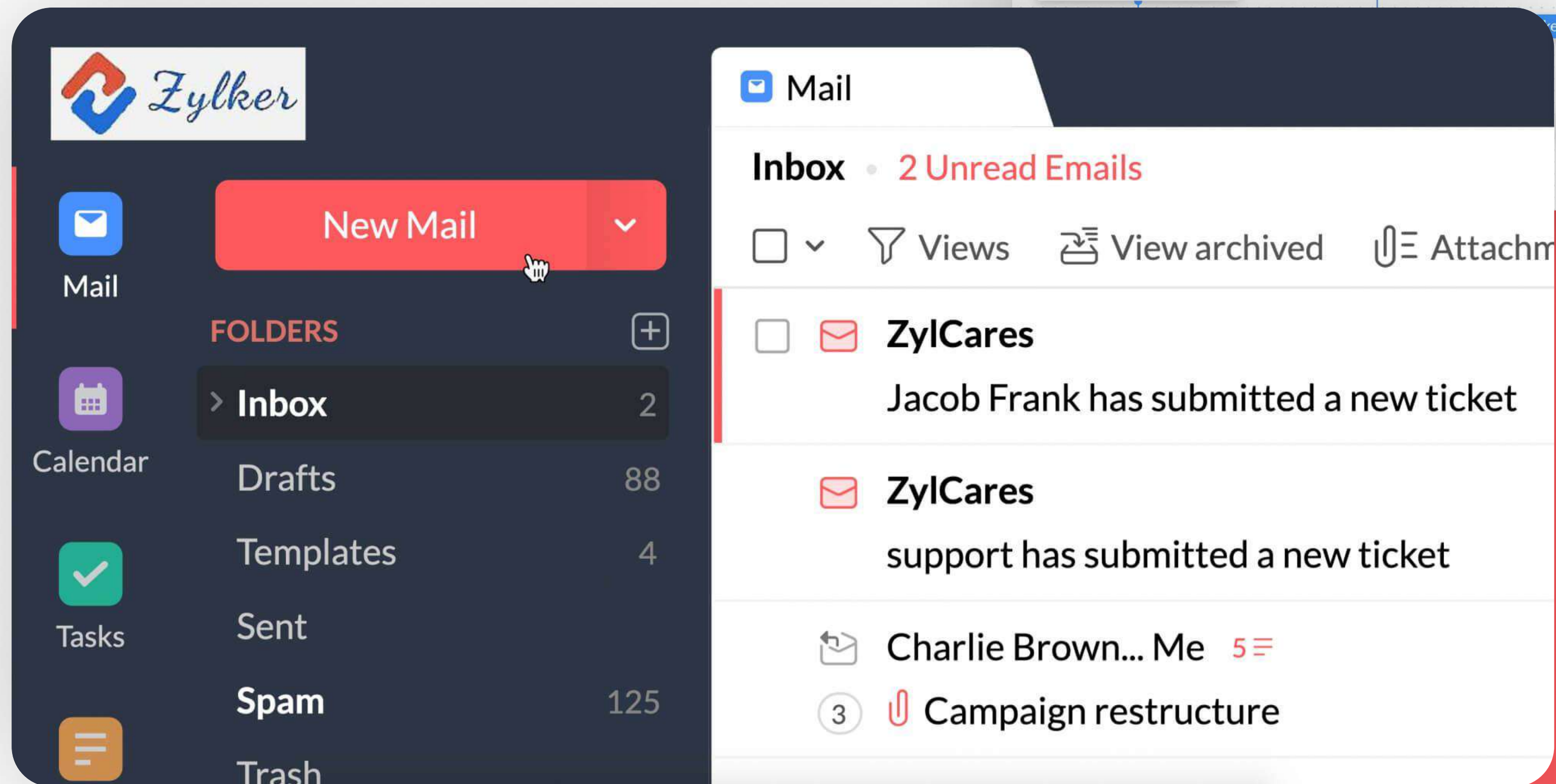
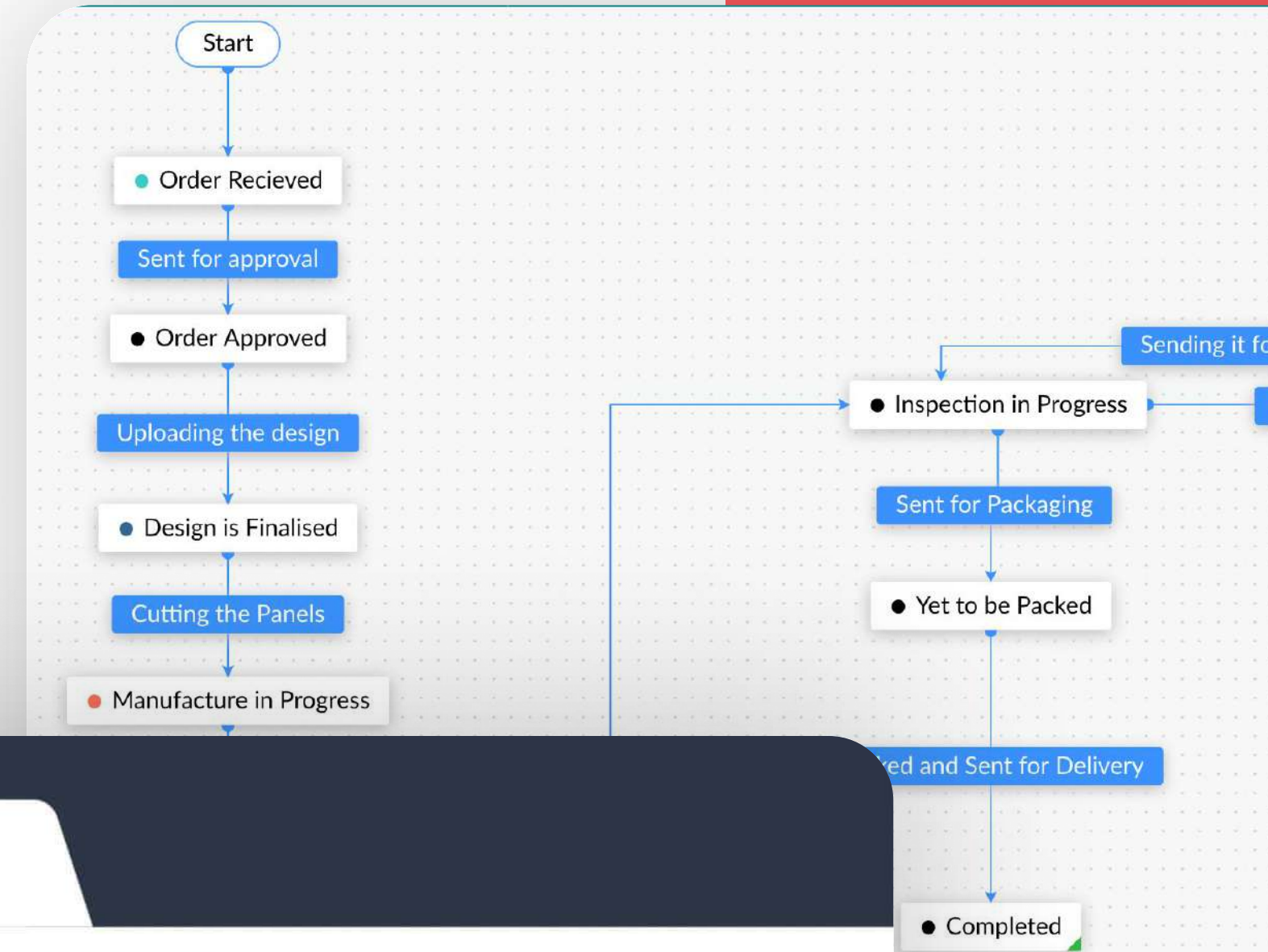


Full Trading



Solution

1. Generated Leads Into **Zoho CRM** From Various Sources.
2. Automated Welcome **Emails And Follow-Up Calls**.
3. Converted Potential Leads Into **Accounts, Contacts, And Deals Modules**.
4. Created Complex **Blueprints Based On Product And Service Selection**.
5. Managed Payment Follow-Ups And Automations Based On **Payment Methods**.



Zylker

Mail

Calendar

Tasks

New Mail

FOLDERS

- Inbox 2
- Drafts 88
- Templates 4
- Sent
- Spam 125
- Trash

Mail

Inbox • 2 Unread Emails

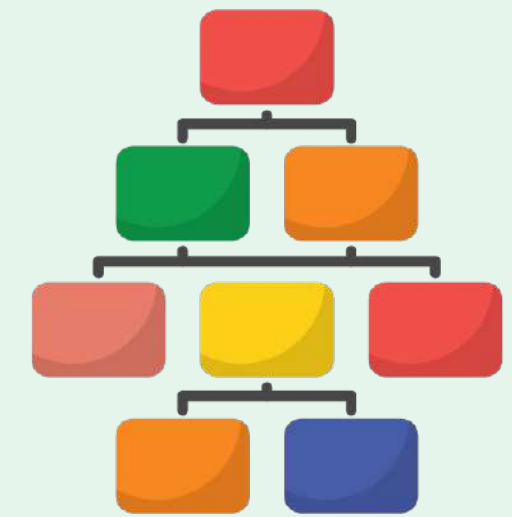
- ZylCares: Jacob Frank has submitted a new ticket
- ZylCares: support has submitted a new ticket
- Charlie Brown... Me 5
- Campaign restructure 3

How Addlight Helped Using Zoho One

1 Provided Complete Trading Process Tracking.



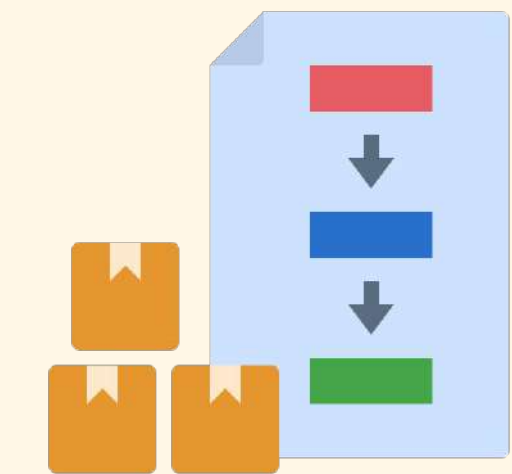
2 Streamlined Process Flow With Document Attachments, Tasks, And Reminders.



3 Enabled Detailed Revenue Estimation Reports.



4 Improved Batch-Wise Inventory Tracking.



Case Study 6: Insurance & Share Market Company (Industry- Insurance & Investment)

Problem Statement

The Company Needed To Track Leads From Different Verticals, **Automate Welcome Messages, Manage Lead Generation, Track Channel Partner Leads, And Handle Subscription And Support Processes.**



Manage Lead Generation



Handle Subscription



Automate Welcome Messages

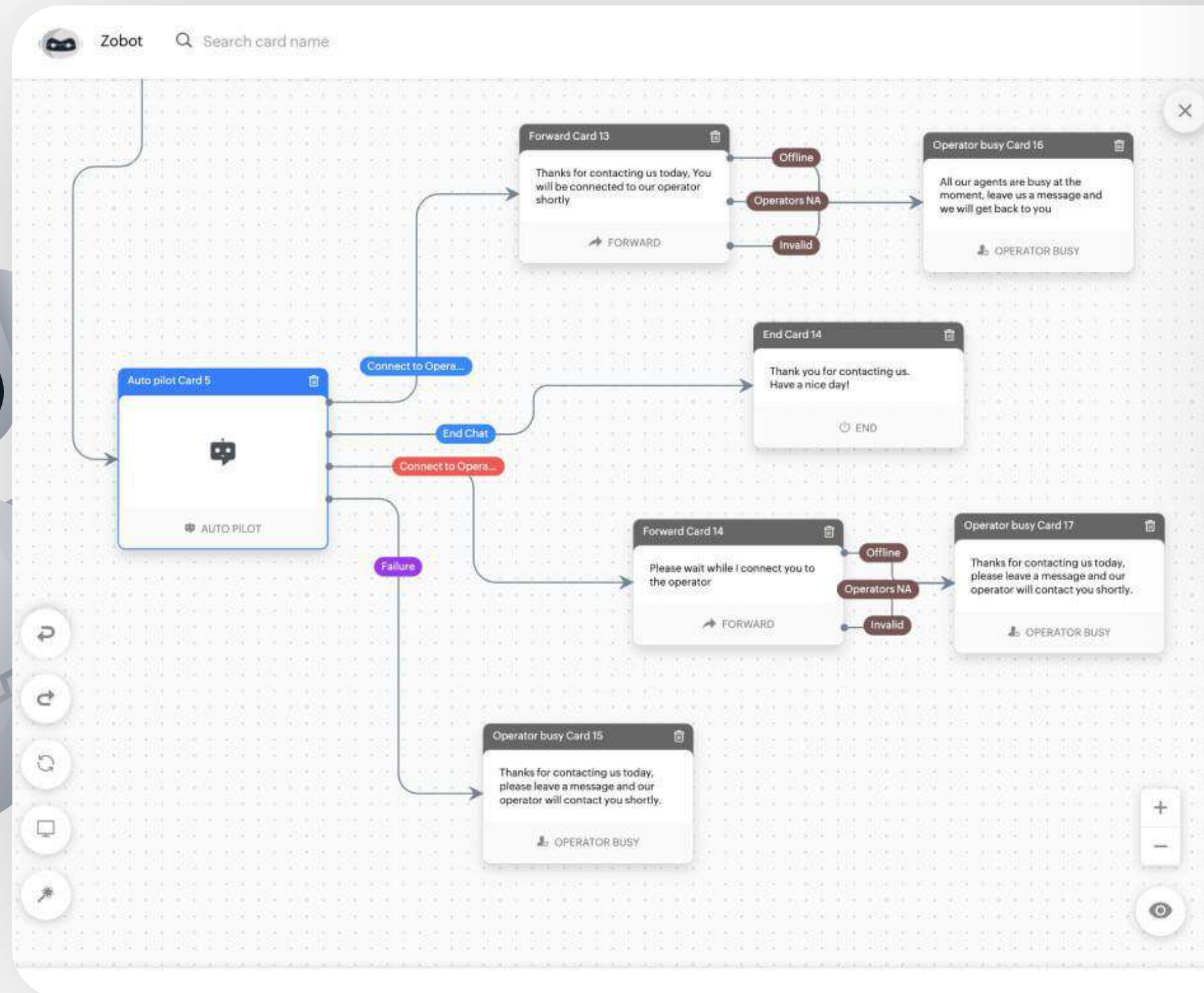
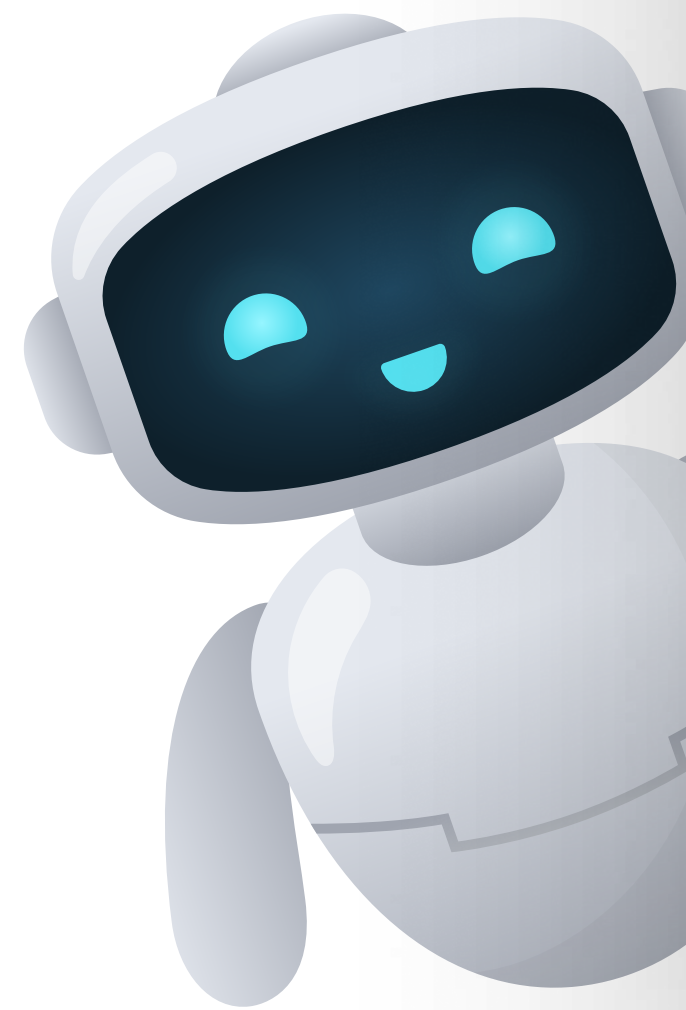


Support Processes



Solution

1. Created Zoho SalesIQ **Chatbot** For Visitor **Tracking And Lead Nurturing**.
2. Utilized Zoho CRM For **Lead Tracking And Generation**.
3. Integrated WATI For Automatic **WhatsApp Messages**.
4. Automated Subscription Generation And **Invoice Sending**.
5. Developed Support-Related Workflows And **Ticket Tracking In Zoho CRM**.



How Addlight Helped Using Zoho One

Enabled Comprehensive Lead Generation
And Tracking.

1



Automated WhatsApp Messages, Emails,
And Portal Invitations.

2



Managed Incentive Structures Based On Lead
Generation.

3



Streamlined Subscription Management And
Invoicing.

4



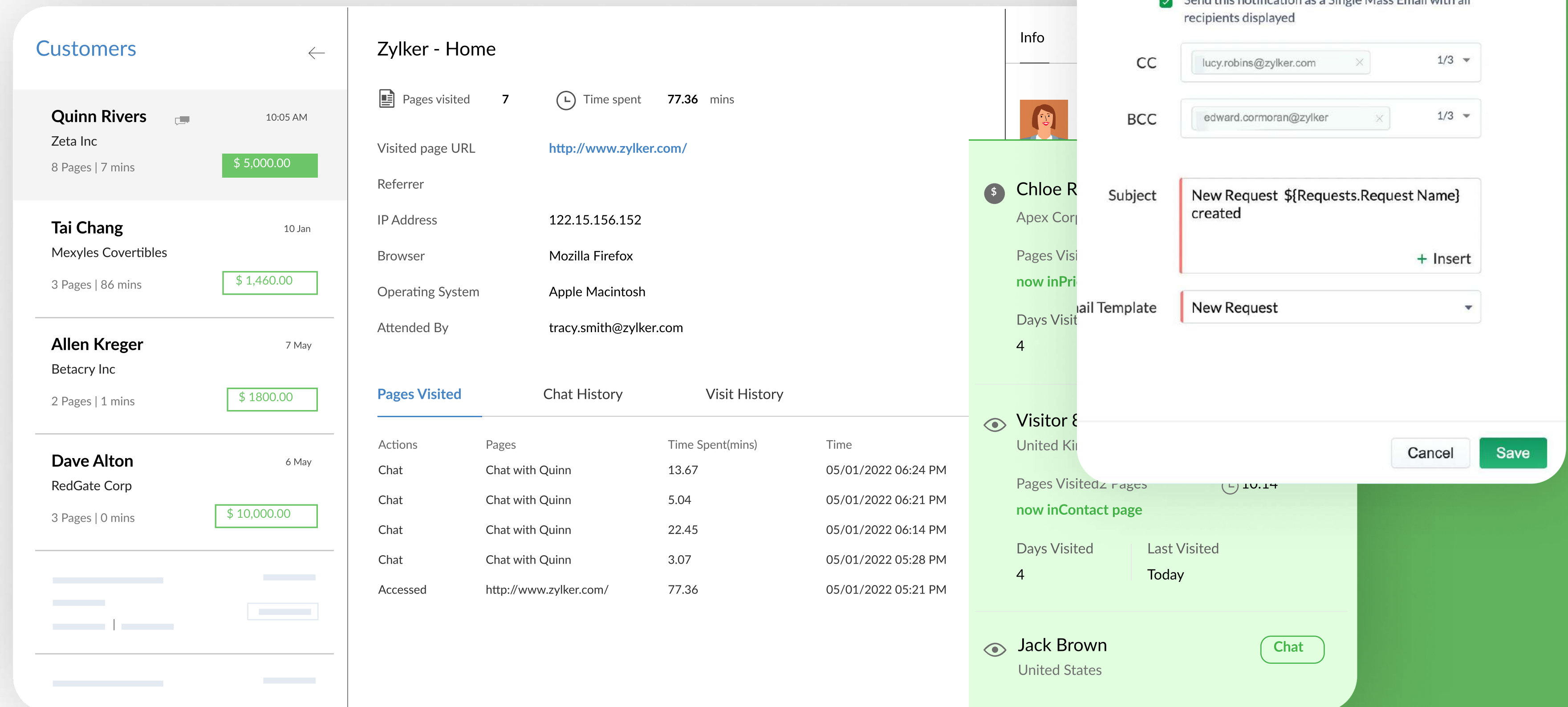
Problem Statement

The Company Needed To Track **Leads From Various Sources**, Automate **Welcome Mails**, Send **Product-Specific Brochures**, Handle **Quote Sending**, And Perform **Margin Calculations**.



Solution

1. Utilized Zoho CRM For **Lead Generation And Nurturing**.
2. Automated **Welcome Mails And Lead Owner Assignments**.
3. Assigned Tasks For **Quote Sending And Margin Calculations**.
4. Set Up Automatic Stage Updates And **Email Notifications** For Sales Orders.



The screenshot displays the Zoho CRM interface. On the left, a 'Customers' list shows details for Quinn Rivers, Tai Chang, Allen Kreger, and Dave Alton, including their companies, visit dates, and associated revenue. The main area shows visitor analytics for 'Zylker - Home', including pages visited (7), time spent (77.36 mins), and a table of visit history. On the right, an 'Add Email Notification' window is open, showing configuration for a 'New Request Notification' email, including recipient lists, subject line, and a 'Save' button.

Customer Name	Company	Visit Date	Pages	Mins	Revenue
Quinn Rivers	Zeta Inc	10:05 AM	8 Pages	7 mins	\$ 5,000.00
Tai Chang	Mexyles Convertibles	10 Jan	3 Pages	86 mins	\$ 1,460.00
Allen Kreger	Betacry Inc	7 May	2 Pages	1 mins	\$ 1800.00
Dave Alton	RedGate Corp	6 May	3 Pages	0 mins	\$ 10,000.00

Actions	Pages	Time Spent(mins)	Time
Chat	Chat with Quinn	13.67	05/01/2022 06:24 PM
Chat	Chat with Quinn	5.04	05/01/2022 06:21 PM
Chat	Chat with Quinn	22.45	05/01/2022 06:14 PM
Chat	Chat with Quinn	3.07	05/01/2022 05:28 PM
Accessed	http://www.zylker.com/	77.36	05/01/2022 05:21 PM

Add Email Notification

Name: New Request Notification

Module: Requests

From: noreply@sender.localzohofsm.com

To: Contact-Email, Request-Email (2/3)

Send this notification as a Single Mass Email with all recipients displayed

CC: lucy.robins@zylker.com (1/3)

BCC: edward.cormoran@zylker.com (1/3)

Subject: New Request \${Requests.Request Name} created

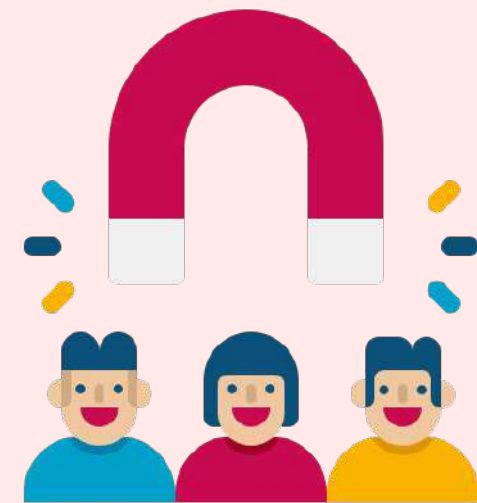
Mail Template: New Request

Buttons: Cancel, Save

How Addlight Helped Using Zoho One

Streamlined Lead Management And Automations.

1



Managed Quotes And Vendor Relationships.

2



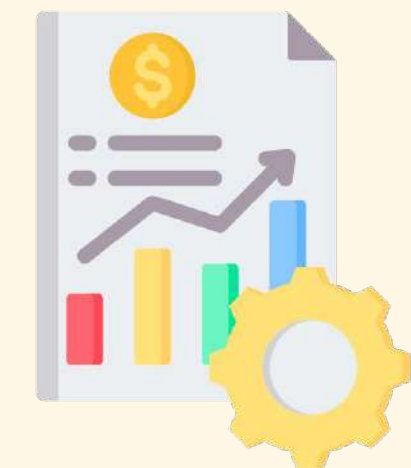
Performed Detailed Margin Calculations.

3



Provided Comprehensive Sales Cycle Reports.

4



Problem Statement

The Company Needed To Generate Leads From Various Sources, **Track Offline Campaigns, Manage Website And WhatsApp Leads, And Automate Product Delivery And Support Processes.**



Solution

1. Used Zoho SalesIQ For Website **Visitor Tracking** And **Lead Nurturing**.
2. Integrated Zoho Forms With **QR Code Scanner** And **OTP Validation**.
3. Automated WhatsApp Chatbot For **Product Delivery** And **Management**.
4. Created Email Notifications For **Leads** And **Distributors**.



✓ Preset applied successfully

Prospects	Returning Visitor	Time on site 5min	Country	Score
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	= 95
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	= 75
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	= 25
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	= 65

Select a view

Hide visitors connected to other operators

DEFAULT

CRM Values ⓘ

Action ⓘ

Last activity time ⓘ

Past chats ⓘ

Time spent ⓘ

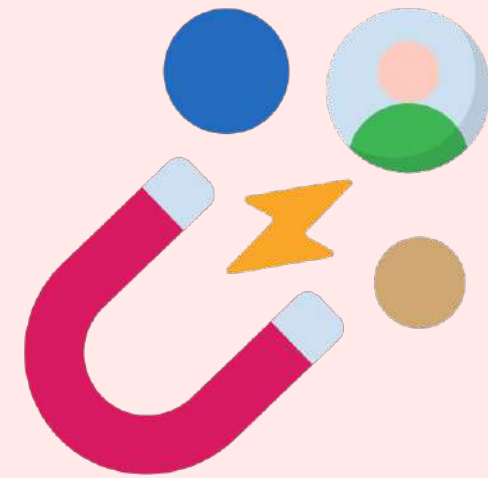
Visits ⓘ

CUSTOM [Add](#)

How Addlight Helped Using Zoho One

Enabled Multi-Source Lead Generation.

1



Streamlined Lead Generation Through QR Code Scanning And OTP Validation.

2



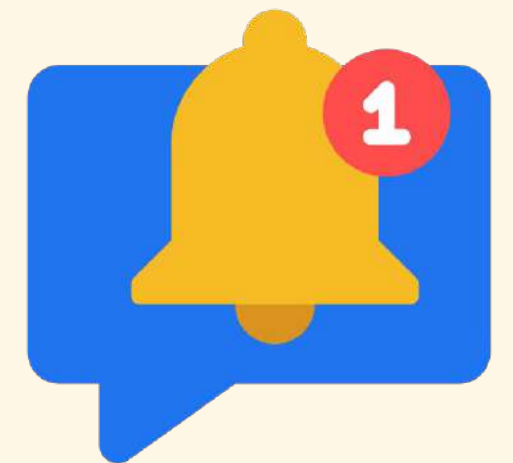
Managed Post-Sales Support And Email Automations.

3



Provided Detailed Lead Notifications To Distributors.

4



Problem Statement

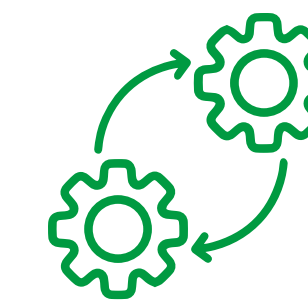
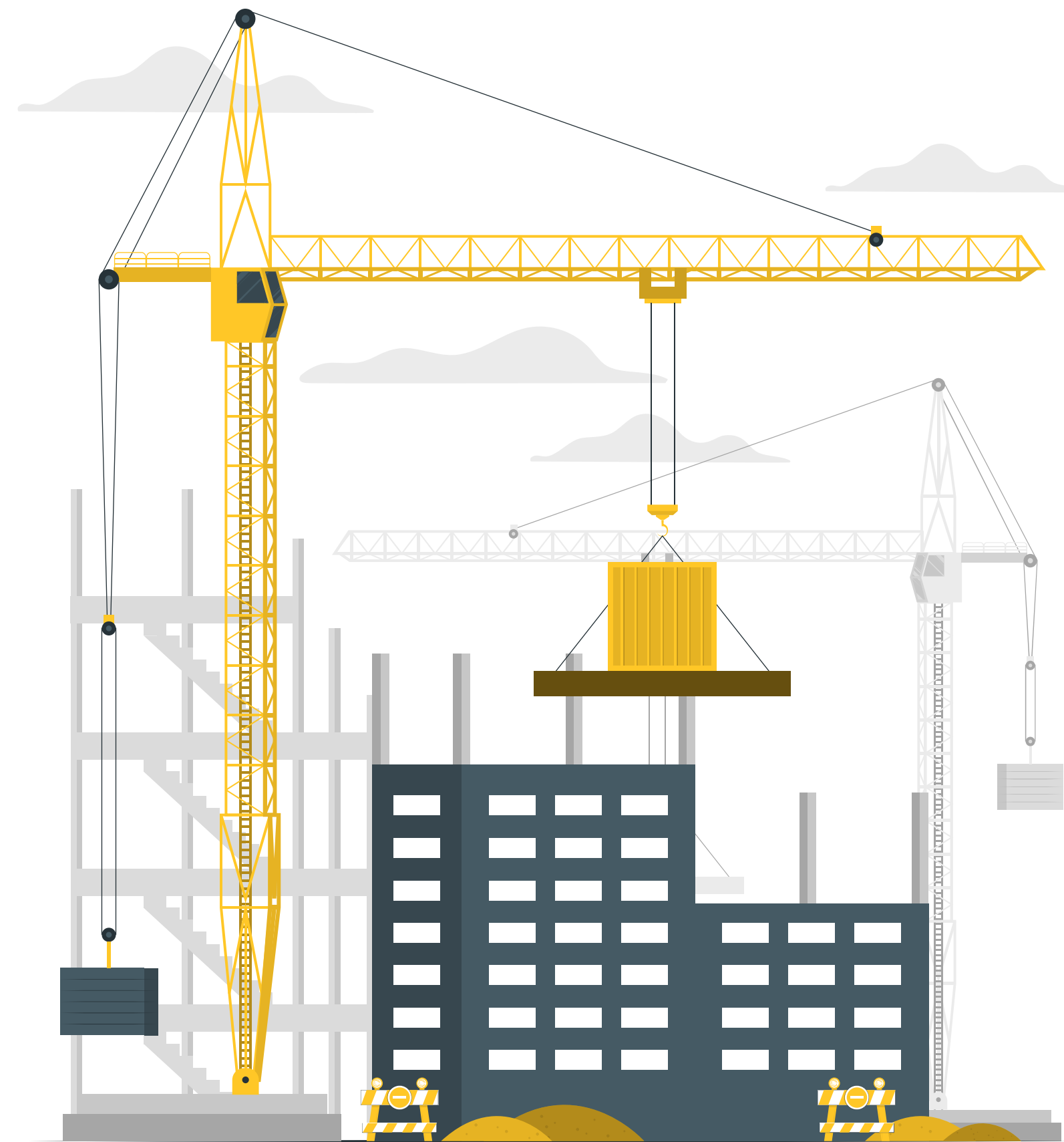
The Company Needed To **Manage Leads From Various Sources, Nurture Leads, Send Quotations, Handle Deal Stages, And Automate Tasks And Reminders** For Project Tracking.



**Leads From
Various Sources**



**Handle
Deal Stages**



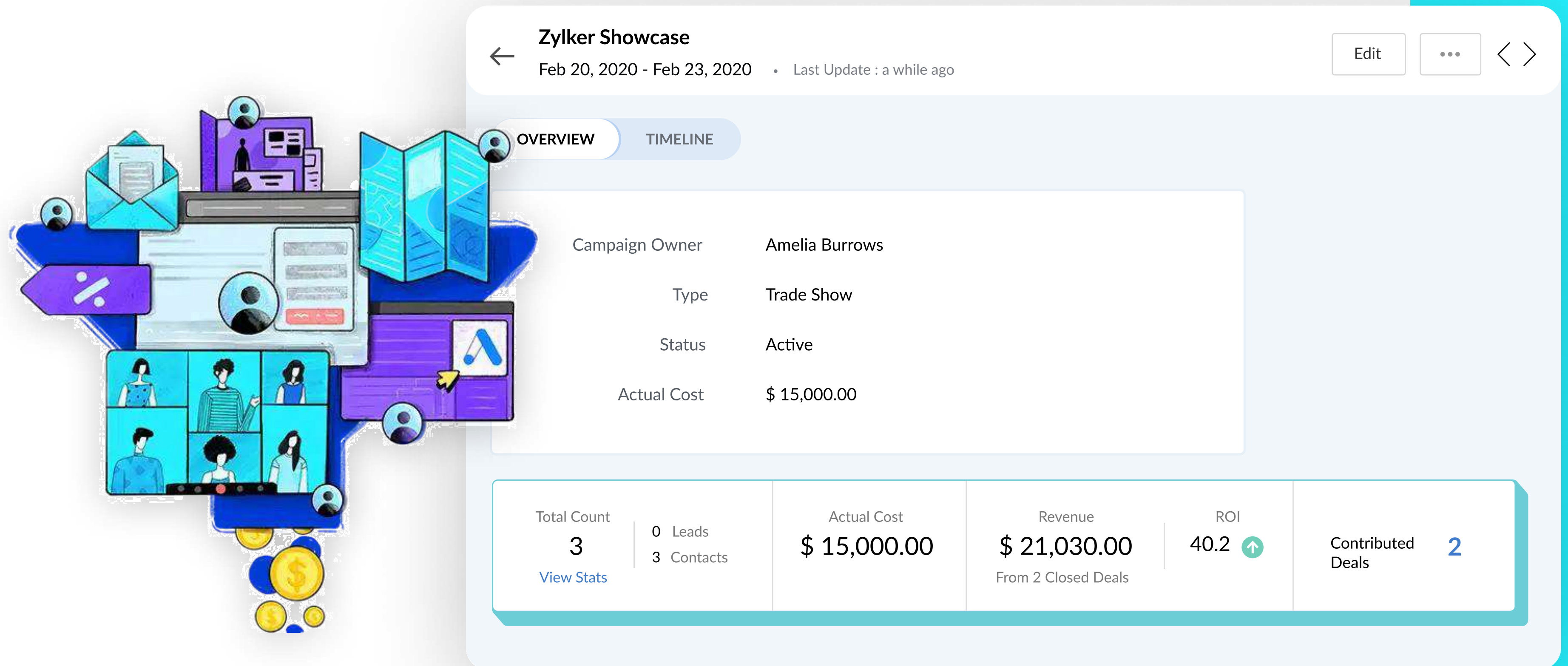
**Automate
Tasks**



**Tasks
Reminders**

Solution

1. Utilized Zoho CRM For **Lead Generation From Various Sources.**
2. Nurtured Leads By **Updating Requirements And Sending Quotations.**
3. Converted Accepted Leads Into **Accounts, Contacts, And Deal Modules.**
4. Created Deal Stages For Different Services With **Automated Task And Reminder Assignments.**
5. Set Up Complex Tasks And Reminders For **Various Deal Stages.**



Zylker Showcase
Feb 20, 2020 - Feb 23, 2020 • Last Update : a while ago

OVERVIEW | TIMELINE

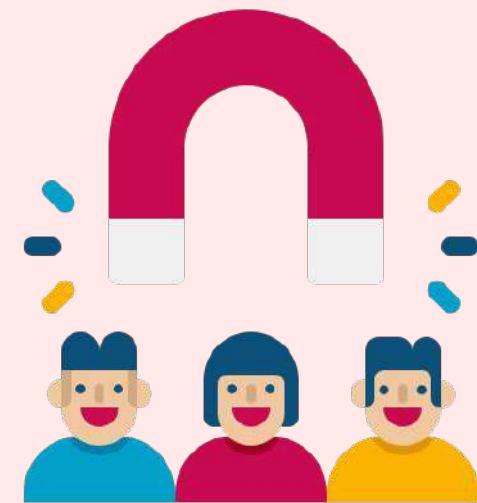
Campaign Owner	Amelia Burrows
Type	Trade Show
Status	Active
Actual Cost	\$ 15,000.00

Total Count	0 Leads	Actual Cost	Revenue	ROI	Contributed Deals
3	3 Contacts	\$ 15,000.00	\$ 21,030.00	40.2 ↑	2
View Stats			From 2 Closed Deals		

How Addlight Helped Using Zoho One

Enabled Detailed Project Tracking From Lead Generation To Project Completion.

1



Provided Daily Project Reports Per Site And Service Type.

2



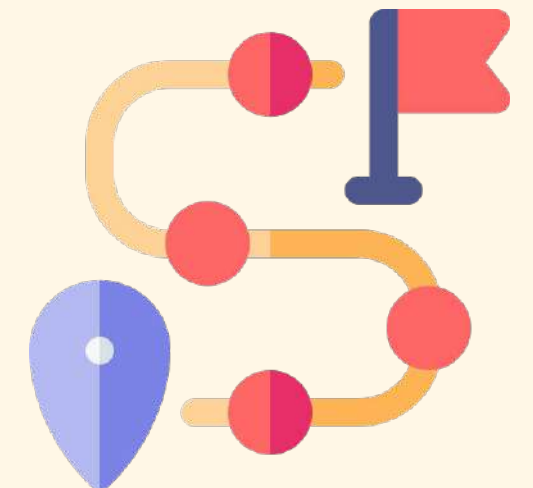
Enhanced Revenue Forecasting By Comparing Sales And Purchase Cycles.

3

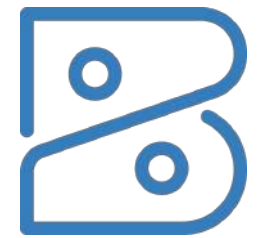


Improved Project Timeline Tracking.

4



Summary Of Zoho Software Capabilities



Zoho Books

Sales, Purchase, Expense Management, And GST Filing.



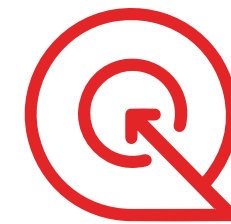
Zoho Expense

Purchase Request And Expense Management.



Zoho Forms

Lead Generation And Surveys.



Zoho SalesIQ

Website Visitor Tracking And Lead Nurturing.



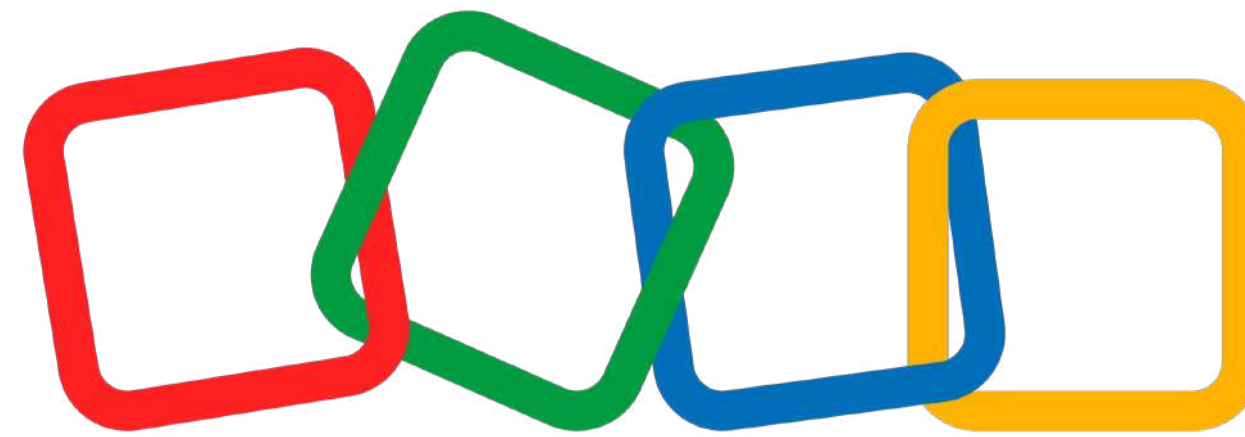
Zoho Subscription

Subscription Management.



Zoho Social

Social Media Management And Integration.



Z O H O



Zoho Trainer Central

Online Learning Platform.

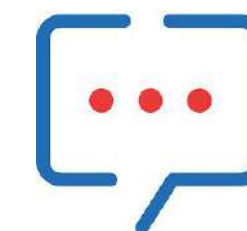


Zoho CRM

Lead Management, Nurturing, Automation, And Detailed Reporting.



Adding Light Of Automation And Ai To Scale Your Business.



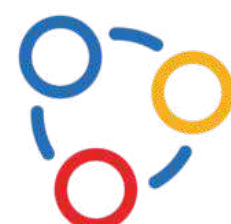
Zoho Cliq

Internal Team Engagement.



Zoho Inventory

Inventory And Warehouse Management.



Zoho Connect

Internal Communication And Discussion Forum.



Zoho Sites

Business Website Creation

addlight

Adding Light Of Automation And Ai
To Scale Your Business.

LET US HELP YOU IMPLEMENTING



**Zoho
One**

&

**The Wise
Parrot**



To Automate And Scale Your Business