

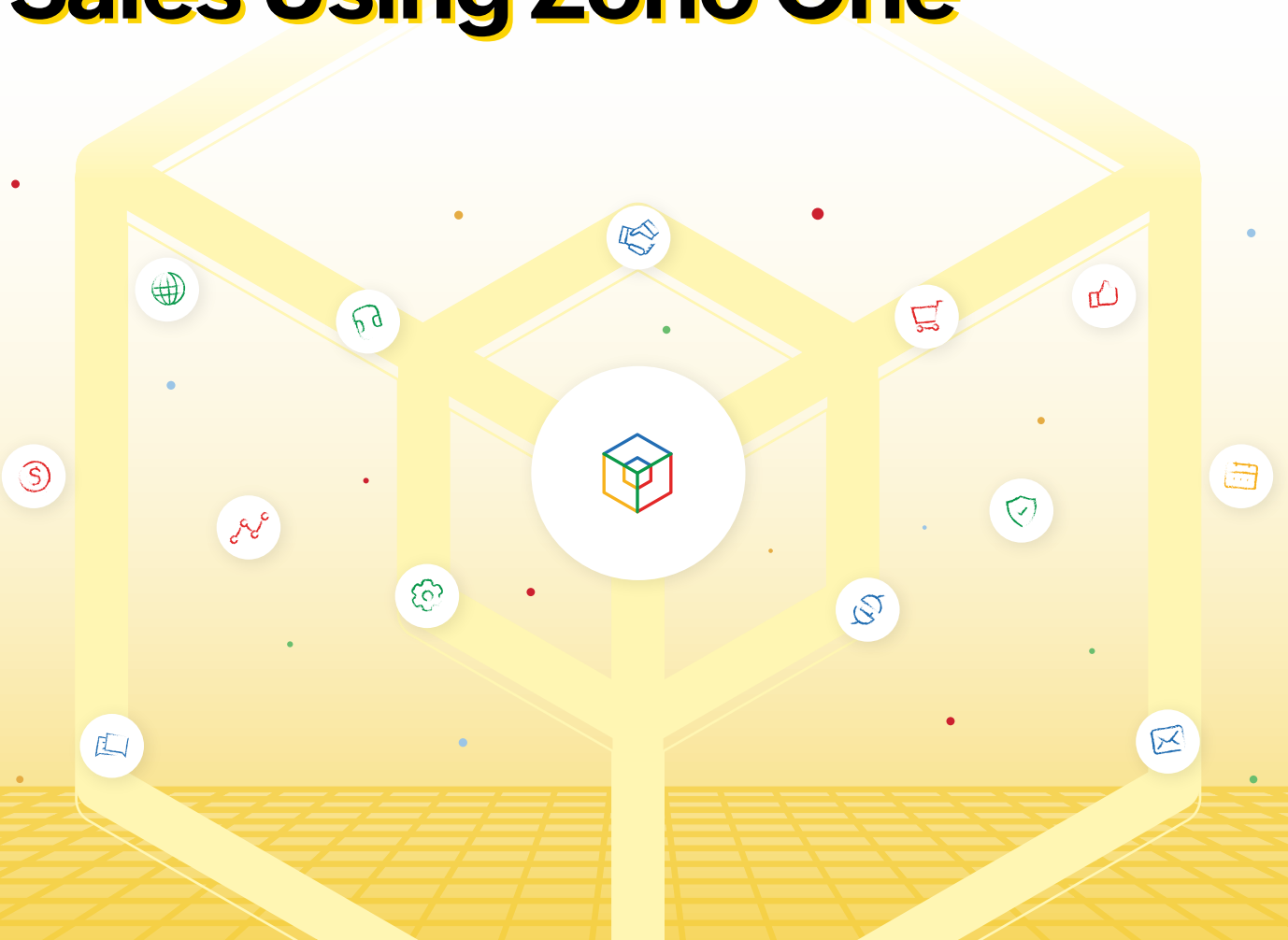


Zoho
One

ACCEPT

Case study

Accept's Journey to Streamlined Marketing and Sales Using Zoho One



zoho.com/es-xl/

About



Company Name: Accept
(A division of Sinmetro)



Founded: 2002



Employees: Over 30



Industry Manufacturing, with a focus on software development, industrial quality control, training, and R&D consultancy.

Accept operates in a highly competitive industry, providing solutions that ensure defect-free production, increased productivity, and real-time monitoring. With a long-established client portfolio and a solid reputation in industrial quality management, the company sought to increase market share. Accept recognized the need for a more integrated marketing and sales approach to capture new clients and retain existing ones. This led them to a pivotal decision: adopt Zoho One to transform their fragmented marketing and sales systems into a cohesive, data-driven ecosystem.

Challenges Before Zoho One

Before implementing Zoho One, Accept faced several key challenges:

- ✦ **Fragmented Systems:** Customer data and processes were scattered across different platforms, making it difficult to maintain a unified approach to client management.
- ✦ **Lack of Automation:** Sales and marketing processes were largely manual, leading to inefficiencies and missed opportunities.
- ✦ **Limited Customer Insight:** Without an integrated CRM, Accept struggled to gain a 360° view of its clients, impeding decision-making and relationship-building efforts.

In order to grow and stay competitive, the company needed a comprehensive solution that could unify their marketing and sales teams, streamline operations, and provide actionable insights through data.

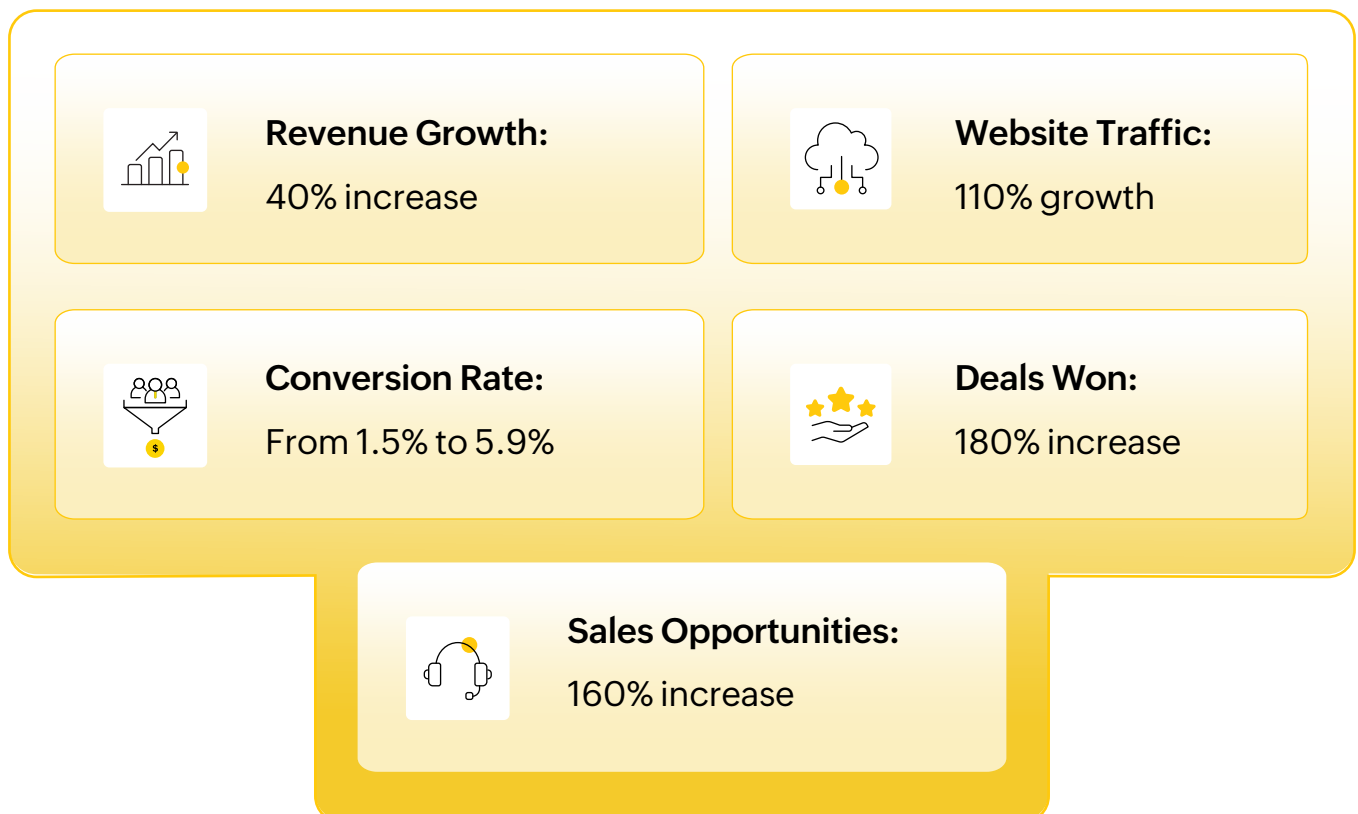
Zoho One Implementation

Why Zoho One? The Decision-Making Process

The decision to switch to Zoho One was not made lightly. Accept conducted a thorough procurement process, evaluating various CRM and automation systems. A critical need emerged: **unifying all customer information** into a single platform, while enabling more advanced marketing automation to scale their growth.

Initially, Accept experimented with a different system, but after a year-long trial, it became clear that Zoho One was a more flexible and scalable solution that could adapt to Accept's evolving needs. Zoho One allowed Accept to standardize and streamline its sales processes while integrating with marketing efforts, analytics, and customer service — all essential to support long-term growth.

Key Metrics and Results



Why Zoho One? The Decision-Making Process

After deciding on Zoho One, Accept integrated several key solutions to modernize their business operations:



Zoho CRM: Centralized all customer and lead data, ensuring the sales team had a complete view of each interaction.



Zoho Analytics: Provided actionable insights through real-time dashboards and detailed reports, allowing Accept to track performance metrics across marketing and sales.



Zoho Campaigns: Automated email marketing, helping Accept nurture leads, distribute content, and execute targeted campaigns more effectively.



Zoho Surveys: Enabled feedback collection from clients to continuously improve service delivery and client relationships.



Zoho Social: Managed and optimized social media marketing efforts to increase brand visibility and engagement.



This implementation represented a significant leap from the company's previous fragmented approach. Zoho One provided an integrated system that allowed Accept to align marketing and sales strategies for maximum impact.

Core Zoho Tools Used:



Agile Project Management and Execution

The implementation of Zoho One at Accept was meticulously planned. A macro implementation strategy was developed, complete with key milestones and a roadmap of tasks to be completed. However, flexibility was crucial, so Accept opted for the Agile methodology, specifically using the Kanban framework. This approach allowed the company to adapt quickly to new challenges and opportunities, ensuring that high-impact tasks could be executed without delay.

Gonçalo Martins, Partner and System Analyst at Sinmetro, emphasized the importance of flexibility: ***"The Agile approach allowed us to be responsive, adaptable, and to maintain the momentum we needed to stay competitive."***

Challenges Faced and Overcome

During the initial stages of the project, Accept faced a critical challenge: switching from their previous CRM provider to Zoho One. This transition required significant effort in migrating data, adjusting workflows, and retraining staff to use the new system. However, the switch also provided an opportunity to align the new system with Accept's business processes and best practices, ultimately resulting in a better-organized and more efficient operation.

"The switch between software brands was challenging but necessary," said Gonçalo Martins. ***"It allowed us to model the system according to our business needs instead of adjusting our practices to the software's limitations."***

Zoho Partner Collaboration: The Role of Liminal

Zoho One's success at Accept was largely driven by its strategic partner, Liminal, a consultancy specializing in CRM, marketing automation, and analytics. Liminal was chosen for its strong technical expertise and its ability to blend technology with strategic business planning.

- ◆ 1. Extensive Experience in B2B Marketing: Especially in the industrial sector, Liminal had deep knowledge of the specific needs and challenges Accept faced.
- ◆ 2. Custom Solutions: Liminal provided tailored solutions that aligned Zoho One with Accept's operational realities, ensuring a smooth transition and optimal performance.
- ◆ 3. Empathy and Dedication: Accept appreciated Liminal's availability and commitment to continuous improvement, adjusting processes in real-time based on feedback.

Accept's team lauded Liminal for their holistic approach. ***"We didn't just need a software vendor; we needed a strategic partner,"*** Gonçalo explained. ***"Liminal understood that, and they led a comprehensive digital transformation for us."***

Ongoing Support and Training

In addition to implementation, Liminal took charge of training Accept's employees to ensure they could utilize Zoho One to its fullest potential. Liminal also provided ongoing support, which has been critical in helping Accept refine its use of Zoho's tools and continuously improve its marketing and sales processes.

Tangible Benefits of Zoho One Implementation

Revenue Growth and ROI

The results of Zoho One's implementation have been impressive. Within two years, Accept saw significant gains across multiple metrics:

- ◆ Revenue Increase A 40% growth in overall revenue, driven by more effective marketing campaigns, better lead conversion, and improved sales processes.
- ◆ Website Traffic An increase of 110% in website visitors, which was directly linked to improved SEO, targeted campaigns, and social media optimization through Zoho Social.
- ◆ **Sales Opportunities:** Growth of 160% in the number of sales opportunities generated, resulting in a 180% increase in deals won in 2020 compared to 2019.

The unified approach provided by Zoho One played a critical role in driving these results, as sales teams could now access real-time insights into customer behavior, sales performance, and marketing efficiency.

Improved Conversion Rates

One of the standout benefits has been the marked improvement in conversion rates. Prior to the implementation of Zoho One, Accept's conversion rate from leads to closed deals was 1.5%. Within three years, this rate skyrocketed to 5.9%.

This increase was largely attributed to the integration of marketing automation and CRM functionalities, which enabled more personalized, timely, and targeted customer engagements.

Enhanced Employee Productivity

With Zoho CRM and Marketing Automation handling much of the manual work that previously bogged down sales and marketing teams, Accept has experienced a noticeable boost in productivity. All team members can now focus on high-value activities like relationship-building and strategic decision-making, rather than wasting time on administrative tasks.

As Gonalo noted, ***“Our processes are clearer, more directed, and more effective than ever before.”***

Leveraging Zoho Analytics: A Data-Driven Approach

Real-Time Dashboards and KPI Tracking

Zoho Analytics has become a cornerstone of Accept’s operations. The company set up comprehensive dashboards to track key performance indicators (KPIs) across marketing, sales, and customer service. These dashboards allow for real-time monitoring of critical metrics, enabling teams to make data-driven decisions more quickly and with greater confidence.

Some of the key dashboards include:

- ◆ **Top-of-Funnel (ToFu):** Website analytics, SEO performance, account forensics, and paid search analytics.
- ◆ **Middle-of-Funnel (MoFu):** Email marketing performance, content engagement metrics, and lead scoring.
- ◆ **Bottom-of-Funnel (BoFu):** Sales stage reporting, deal velocity, and customer satisfaction scores.

With this analytical power, Accept can quickly identify areas of improvement and optimize campaigns or processes in real-time.

Specific Use Cases: Real-World Applications of Zoho One

Marketing Automation and Customer Engagement

Before Zoho One, Accept's marketing efforts were largely manual and time-consuming. With the implementation of Zoho Campaigns and Zoho Surveys, Accept was able to automate email campaigns and systematically gather feedback from clients. These automation tools provided real-time insights into how customers responded to various content, allowing Accept to continuously refine its approach.

For instance, by adapting email content based on customer interactions, Accept saw a significant increase in engagement rates. Automated newsletters and gated content, such as white papers and industry reports, became valuable tools for nurturing leads and building stronger client relationships.

Streamlined Sales Operations

Through Zoho CRM, Accept unified its marketing and sales processes, enabling a seamless flow of information between departments. This integration has been critical for improving lead management, ensuring that marketing-generated leads are properly nurtured and passed to sales at the optimal time. Automated workflows within the CRM also helped the sales team prioritize leads and close deals faster, contributing to the overall growth in revenue and conversion rates.

Recommendations for Other Businesses

Why Zoho One?

Accept highly recommends Zoho One for any business looking to unify its marketing and sales processes, particularly in industries where real-time insights and data-driven decisions are essential for success.

Key Benefits of Zoho One:

- ★ **1. Comprehensive Suite:** Zoho One's all-in-one nature eliminates the need for multiple fragmented systems.
- ★ **2. Scalability:** Zoho One can easily scale with growing businesses, allowing companies like Accept to expand without worrying about outgrowing their systems.
- ★ **3. Cost-Effectiveness:** By consolidating tools into a single suite, Zoho One delivers high value at a competitive price, providing significant cost savings over time.

Partnering with Experts

Accept strongly advises working with a Zoho-certified partner like ****Liminal**** to maximize results. The expertise and hands-on support provided by Liminal allowed Accept to achieve outcomes that would have been difficult to attain on their own.

Looking Ahead: Future Plans and Continuous Improvement

With the solid foundation provided by Zoho One, Accept is now focused on scaling its operations even further. The company plans to expand into new markets while continuing to refine its marketing and sales processes using data-driven insights.

Gonçalo Martins concluded, ***“With Zoho One, we’ve built the infrastructure needed to support sustained growth. Our next steps will be to leverage this system to enter new markets and continue refining our approach as we grow.”***

Conclusion

Zoho One has been a game-changer for Accept. From improving lead generation and conversion rates to unifying customer data and boosting productivity, the platform has provided the tools necessary to drive explosive growth. With the continued support of their partner Liminal, Accept is well-positioned to capitalize on future opportunities and maintain its competitive edge in the industry.

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