



CASE STUDY

Driving Operational Excellence

Seales Winslow's Digital Revolution with Valenta's Zoho One Implementation

COMPREHENSIVE ZOHO ONE IMPLEMENTATION AND SYSTEM DEVELOPMENT AND INTEGRATION



INDUSTRY:
Manufacturing



LOCATION:
New Zealand



CHALLENGE:
Legacy CRM, Lack of integrated systems, Absence of a time and resource allocation model



SERVICES:
Zoho One Implementation, System Integration

Applications Used



Zoho One

Custom Finance ERP

Success Highlights

- Digitised the Contract Signing Process
- Built a customised dashboard
- Developed a Territory Model for recording customer interactions
- Increased Sales Team Efficiency

Background

Seales Winslow, is a leading compound ruminant feed manufacturer in New Zealand. Owned by Ballance Agri-Nutrients, the company specializes in offering a comprehensive animal nutrition package for pasture-fed animals and herds. Established in 1968, SealesWinslow Ltd has earned a reputation as the largest independent feed mill in New Zealand, focusing on the production of custom-blended pelleted feed specifically designed for the dairy sector.

Seales Winslow's product range encompasses various nutritional items, including pelleted feed, calf feed, molasses blocks, lifestyle products, and nutritional supplements. Driven by its leadership and its vision, the sales and nutrition teams, the company addresses the varied requirements of customers in the agricultural sector, emphasizing its dedication to the well-being and health of animals.

Challenge

SealesWinslow, embraced new tools and technology to oversee product integrity through systems control. This approach aimed at ensuring product quality throughout various stages, including raw material sourcing, formulations, manufacturing, storage, transportation, and testing. The primary goal is to provide the farmer (customer base) with trustworthy products and dependable advice concerning their animal nutrition needs. However, as time passed, their systems proved inadequate in adapting to the continuously evolving business requirements. The lack of timely upgrades posed significant challenges, affecting numerous critical processes and teams within the organization.

Challenges include the lack of integration between the CRM and legacy Finance ERP Systems which has resulted in a lack of visibility of invoice information for sales personnel. Inability to effectively monitor and report the time spent by sales personnel during customer interactions, both offline and online proved to be a difficulty. Additionally, all contracts were signed manually thereby impacting turnaround time and leading to significant delays. Lack of digitization, led to limited visibility of contract status for key team members as well as leadership.

Approach

Valenta undertook a comprehensive evaluation exercise of key elements of the operating framework such as Zoho CRM system contracts management process, sales team activity planning and monitoring, nature and extent of the finance system, and reporting metrics. The focus was on addressing process challenges and exploring opportunities for additional advanced features in Sales and Operations, as well as Finance and Inventory. Valenta's team worked with the core teams and leadership to define the nature and extent of integration between Zoho CRM and the custom finance system. Valenta employed an agile scrum delivery approach, capitalizing on the company's existing model.

After conducting a meticulous assessment and analysis of the workflow, the team identified Zoho ONE as the solution to many of the organisation's challenges. Through collaborative efforts with the client, Valenta concluded that an upgrade from the current Zoho CRM to the Zoho One would address the current issues and enhance productivity and help garner efficiency in operations. The decision to choose Zoho was grounded in diverse module offering within the Zoho One suite that would align with various business processes, facilitating the integration into a unified Enterprise solution, ensuring automation, cost efficiency, and responsiveness.

With the objective of creating a cohesive platform, and to ensure seamless transition upon rollout, Valenta's product and design teams adhered to consistent key performance indicators throughout the project, emphasizing quality, impact, and client collaboration. The new approach aimed to enhance the sales process by providing timely information to the sales teams and also thereby enhance the customer experience.

The solution was aimed to empower the SealesWinslow's team with the requisite tools to adeptly manage and expand their sales operations while ensuring adequate information is provided to teams and time is effectively utilized. This, in turn, elevates the overall quality of the customer interaction.

Streamlined Implementation

In a year-long, multi-phased project, our team focused on developing advanced Management Information Systems (MIS) frameworks. This initiative involved intricately managing information transfer between systems and ensuring the seamless integration of two pivotal system – CRM and Finance. To seamlessly integrate Zoho CRM and the custom modules we formulated functional specifications which highlighted the nature and extent of data capture and also collaborated closely with the client's in-house tech specialists and leaderships to ensure alignment with their strategic vision and business requirements.

Based on input from business unit heads and leadership the design for a territory planning model was established with a view to specifically track customer interactions by sales personnel, capture available time and also make note of training hours, absence of leave and time devoted to administrative activities. This enabled the sales leads to effectively plan for upcoming months based on time and customer activity recorded across modules in the Zoho Once Suite.

This model seamlessly integrated with the CRM module, providing a real-time updates to the customer life cycle. Tailored dashboards for Sales Representatives and Managers were meticulously crafted to monitor customer visits and associated action item across zones, industry and customer profiles (new / existing).

Additionally, the signing of supply agreement contracts which transitioned into a digital format, and complemented by the customized dashboard offering, provided visibility into facets such as sales, revenue, and customer interactions enabling leadership to identify patterns and trends in customer information that enabled them to make effective decisions.

After establishing the design and architectural framework, the focus was to ensure data migration occurred seamlessly, causing minimal disruption to ongoing operations.

The upgradation resulted in a substantial reduction in Turnaround Time (TAT). The success of these improvements was driven by effective collaboration with the main client contact, complemented by vigilant supervision from a dedicated project management team and enriched by insightful reporting from a proficient business analytics team.



Training

During the system rollout, Valenta conducted comprehensive training sessions for users across various roles. All training sessions were recorded for quick reference and onboarding of new hires. Throughout the deployment phase, our project team remained readily available to address any potential issues. Thorough testing procedures and effective client communication contributed significantly to the successful adoption of the system.

BUSINESS OUTCOMES & RESULTS

The business outcomes and results of the implemented initiatives include the **successful digitization of contract signing process**, leading to a substantial reduction in Turnaround Time (TAT) for the contract signing. This digital transformation ensures contracts are signed in a timely manner before order processing, with an effective tracking mechanism for **pending contracts and contracts on hold**. This also established a **systematic contract renewal processes**.

A **comprehensive invoice history update was also made available in real time**, empowering the sales team to follow-up in a timely manner. This has resulted in improved payables. Key metrics are now tracked for different sales groups, including managers and team members, across zones and clientele. In addition, customer payment-related information was updated in the finance system on a periodic basis.

Furthermore, the establishment of the territory sales planning model and customised dashboards for each user group allows for the effective monitoring of customer interactions, **capturing the sales representatives** time with clients thereby improving utilization. The system facilitates the allocation of clients based on available time, transcending geographical zones, this approach enables the organization to measure face time with clients, correlating it with revenue and customer retention periods, thereby enhancing overall efficiency and fostering stronger client relationships.



“ Key Insights & Takeaways

In light of a meticulously planned implementation and a collaborative partnership with the SealesWinslow, Valenta realized noteworthy outcomes and key insights. The successful establishment of a unified system, coupled with enhancements in end-user experience through a modern UI, simplified content management, exemplifies the project's achievements. The accelerated processing of documents, resulting in heightened operational efficiency, by way of reduction in turnaround times underscores the tangible impact of the implemented solutions.

This case study serves as a compelling illustration of the transformative potential of Valenta's capabilities in implementing Zoho One in the manufacturing services industry. The transparent data architecture ensures that staff members, engaging with customers, have real-time access to relevant information, thereby empowering them to elevate customer interactions. Furthermore, Valenta's adept software engineers, certified for CRM Zoho customization, play a pivotal role in applying proven tools and innovating solutions that not only ensure Return on Investment (ROI) but also contribute significantly to the sustained success of the implemented system.