

# CASE STUDY

## Australian Technology Business



BACKGROUND

CHALLENGE

SOLUTION

### Background

The Australian financial planning industry consists of over 80k professionals. The industry is dominated by software such as Xplan, COIN, Midwinter etc which are very good financial planning software's only.

### Challenge

Our client identified a niche for a financial planning software that would enable Financial Planners to run their business efficiently, research, prepare financial plans (SoA) and provide increased customer service. Our client wanted a solution that they could resell.

### Solution

We built a Zoho vertical CRM with multiple third-party integration such as Yodlee, Mornigstar, CoreLogic, Omnium, Financial Mappers etc. This would enable Financial Planners to obtain real time data from the source of truth i.e. customer's income & expenses directly from their financial Institutions via Yodlee integration, property valuation via CoreLogic and so on. Research tools such Omnium and Mornigstar will help the financial planners to select appropriate risk insurance products for their customers. Financial Mappers would enable extensive cashflow modelling and comparison of various scenarios to model and achieve client's objectives. It would help financial planners to save time as they now don't need to enter the data multiple times. We integrated Zoho Social so that financial planners could interact with their consumers on social media within the CRM. We integrated Zoho Invoice so that they can track the customer invoicing. We integrated Zoho Projects with a set of inbuilt processes that every financial planner would need. We designed various reports and dashboard to keep the financial planner on track with business goals. We implemented their sales funnel with all compliance steps. There is also a client portal access which could be given to customer and referral partners to enable transfer and enhance trust. We also integrated Twilio telephony system so that all calls can be recorded for compliance purposes.

ZOHO CRM ZOHO People ZOHO Projects ZOHO Finance

