CUSTOMISED CRM MOBILE APP AND WEB APPLICATION

CASE STUDY OUTLINE

CUSTOMER BACKGROUND

Our client is in IT industry, providing end-to-end IT solutions to clients for their digital transformation. The company provides IT services & resource outsourcing to its clients globally.

THE PROBLEM

Our client wanted to handle all the incoming inquiries efficiently without missing any of them. The challenge was to have one platform to manage and respond to all leads from calls, emails, social media, landing pages, cloud telephony, and websites. The requirement also included tracking the follow-up history for each lead and enabling easy communication between leads and the company via calls, messages, and emails.

THE SOLUTION

An application to capture and add all leads via calls, emails, and other sources. The features included in the application are:

- Role-based login
- Lead details, lead quality, lead stage
- Assign leads to agents
- Follow-up management with an integrated calendar to schedule follow-ups with push-in notifications for reminders
- Notes and comments to track the lead follow-up details and last contacted information
- Create custom lead lists based on departments or categories
- Make direct calls, send direct messages via WhatsApp, emails and SMS, and share the lead details
- Daily notification and mail report of follow-up details of the leads
- Track the entire conversation history
- Add attachments with lead information
- Build and save custom message templates to directly send to customers
- API Integration of Exotel and Myoperator app

OUR APPROACH

After understanding the complete requirements of the client, Nextwebi worked on developing the navigational flow, wireframe, and front-end design for the application. Post which the application was developed focusing on each minor component of the requirement to track, manage, and handle leads from various sources. The app was developed successfully and deployed at the client site after rigorous testing of the application.

THE APP VIEW
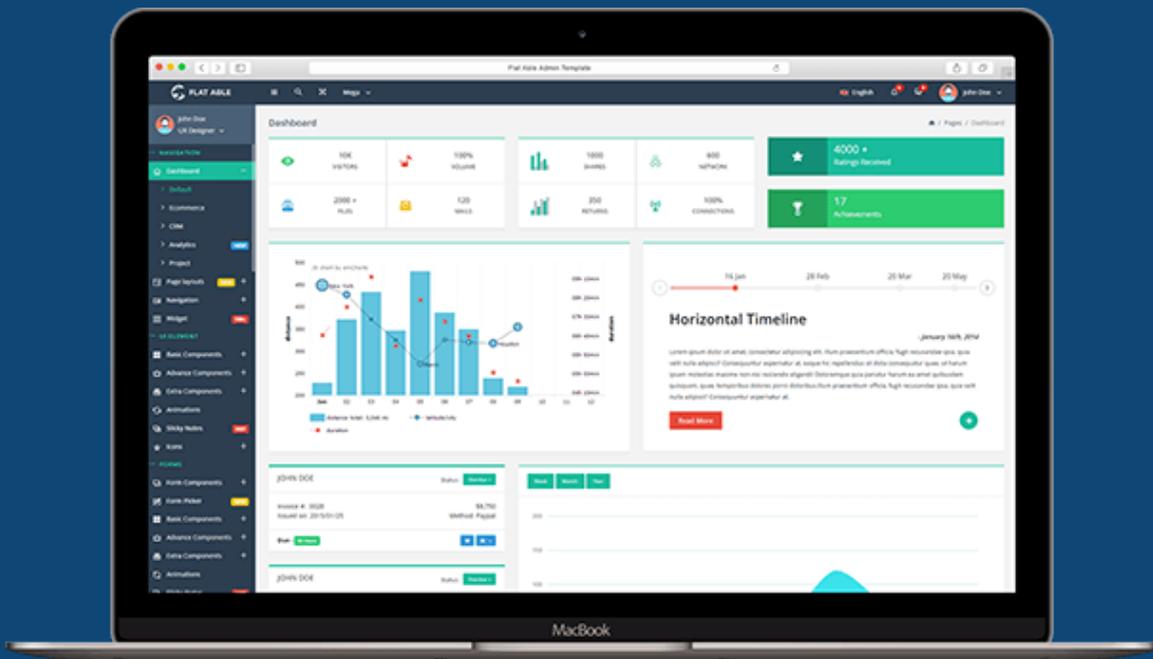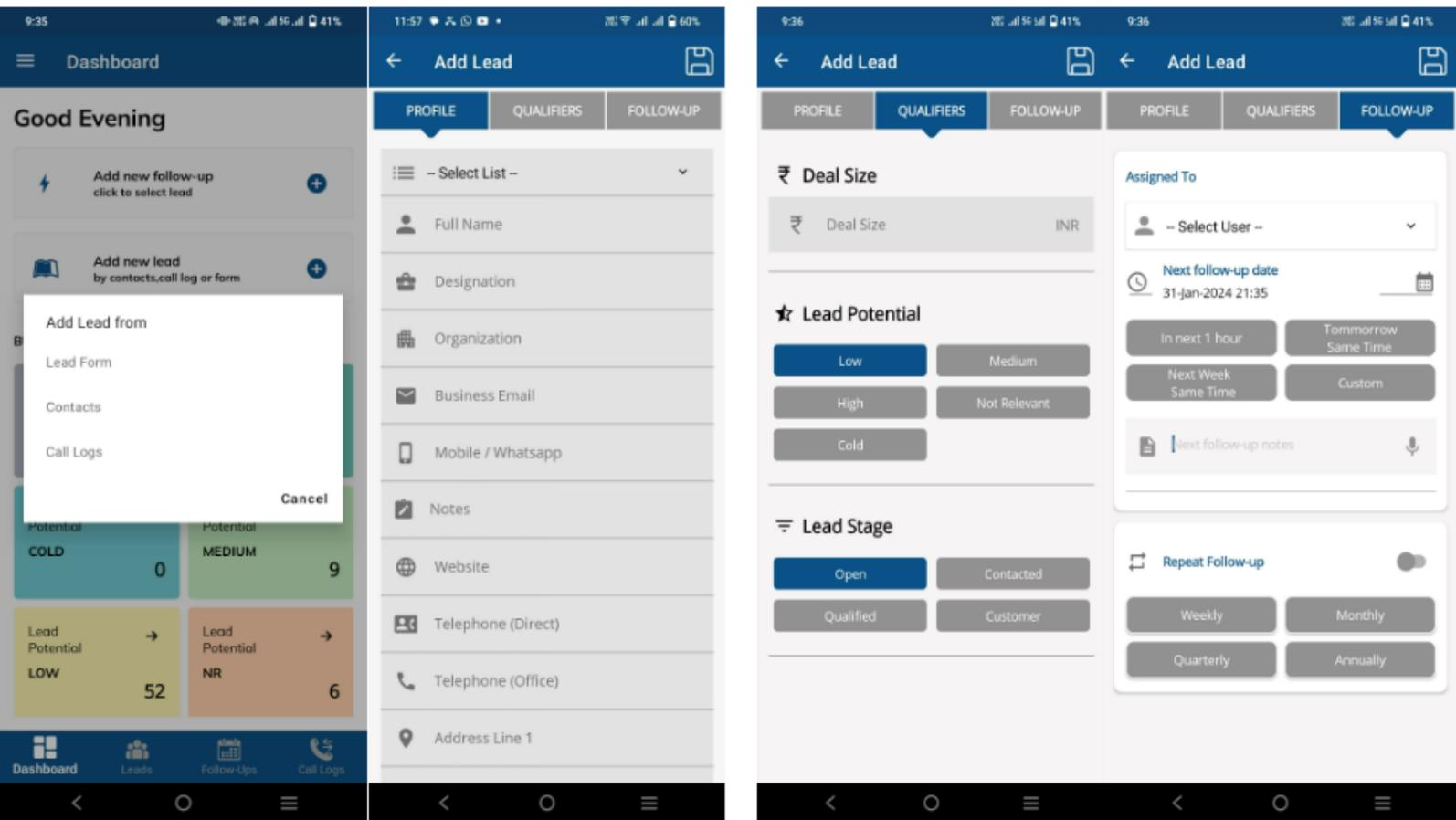
RESULT

Post a detailed research and strategy planning we deployed the application which successfully captures leads directly from phone calls. The leads were received via other sources including WhatsApp and mail. The lead management became easier for all the agents and can be easily tracked and monitored at any time by the admins. Now the application is running smoothly reducing the stress and time involved in managing the various sources of lead flow and management.

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