

# Training Academy Case Study

## *How the Academy Leveraged Zoho's Cloud-Based Solutions to Streamline Operations*

### Overview

This case study shows how Softlogic Systems, a training Academy, improved its operations by moving from a in-house CRM system to a cloud-based solution with Zoho Bigin, Zoho Creator, and Zoho Analytics. Rays and Reach helped the Academy automate lead management, payment tracking, and reporting. This change made the process faster, improved lead conversion, and reduced administrative work, making it easier for the team to manage their tasks efficiently.

### Executive Summary

- Client: Softlogic Systems
- Industry: Training and Certification
- Headquarters: Chennai, India

Our customer, a well-known training institute, helps students and professionals learn the latest technologies. They offer hands-on courses in fields like Data Science, Cloud Computing, and Software Development. With expert trainers and job placement support, they ensure learners gain real-world skills to build successful careers in IT. The institute focuses on practical training and industry-relevant certifications, helping students secure jobs in top companies and stay ahead in the fast-changing tech world.

### Problem Statement and Key Challenges

Softlogic Systems faced multiple challenges with its in-house CRM system. The CRM was custom-built and required frequent modifications to keep up with evolving processes. Since it was not a cloud-based product, they had to invest in infrastructure and maintain an IT team to handle enhancements.

The CRM wasn't integrated with their telephony system, so the team had to track call details manually on spreadsheets. Counselors had to update call logs manually. With no automated call tracking, there was no reliable way to measure call duration or engagement levels. This lack of

insights limited their ability to analyze team performance and optimize lead conversion. The Academy wanted to move to a cloud-based system to streamline processes, reduce costs, and improve productivity through automation and real-time data access.

## Evaluation of the problem

Rays and Reach conducted a thorough analysis of the Academy's lead management process. By mapping their challenges, Rays and Reach recommended Zoho Begin, Zoho Creator, and Zoho Analytics to centralize their lead management, automate workflows, and improve data visibility for better efficiency and performance tracking.

## Proposed Solutions

To address the challenges faced by the Academy, Rays and Reach implemented Zoho Begin, Zoho Creator and Zoho Analytics as key tools to streamline their lead management, payment processing, and reporting systems.

### Lead Management (Zoho Begin)

Leads from different sources were captured in Zoho Begin. These sources included the website, Facebook, Instagram, forms, and walk-ins. The system **automatically assigns** leads to counselors for follow-ups. Each lead stage was clearly defined. The system was designed to track leads that had no response after a certain number of follow-up attempts. These leads were **automatically flagged and reassigned** to other counselors for additional attempts.

The entire lead flow process is now automated. Leads are automatically moved through different stages based on predefined criteria, ensuring that no lead was missed or delayed. This **automation reduced manual intervention**, helping counselors focus on high-priority leads and improving conversion chances.

With the Zoho Begin's mobile app, counselors could now manage leads from anywhere. They could also update lead statuses and make calls directly from the platform, which automatically generates call logs.

### Payment Processing (Zoho Creator)

Zoho Creator was customized to handle the payment process. This system allows students to make payments in full or in installments. We integrated course fees, ensuring automatic adjustments based on the selected payment mode. When a student confirms enrollment, their

payment details are logged by the Counselors, and receipts are automatically generated. The system also tracks outstanding balances.

### **Reporting and Analytics (Zoho Analytics)**

Zoho Analytics was integrated to track lead conversion, student enrollments, counselor performance, and payment tracking. Their management team was trained to use dashboards. This allowed them to monitor key performance metrics effectively. Now they can generate reports independently.

## **Implementation**

Rays and Reach implemented Zoho Solutions for Softlogic Systems over a span of 3 months. This process included training, data migration, and full system customization to ensure a smooth transition and user adoption.

**Migration:** All student and lead data and pending collections data was migrated from the existing system into Zoho Bigin. This ensured no data loss during the transition.

## **Results**

After implementation, Softlogic Systems saw significant improvements in lead management and operational efficiency.

- **Lead Conversion:** Automation in lead assignment and follow-up stages led to higher lead conversion rates. Leads were tracked and reassigned in real-time, ensuring timely follow-ups and better engagement with prospective students.
- **Operational Efficiency:** Counselors saved valuable time that was previously spent manually updating call logs. With automated call tracking and mobile app access, they managed leads more effectively from anywhere.
- **Financial Streamlining:** The Zoho Creator facilitated payment tracking and significantly reduced administrative burden.
- **Data-Driven Insights:** Zoho Analytics provided the team with the ability to track lead conversion, counselor performance, and payment statuses, empowering them to make timely, informed decisions.

## **Rays and Reach Solutions LLP**



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