

# The Good Vitamin Company Case Study

**How The Good Vitamin Company replaced Odoo with Zoho CRM for better customer data management.**

## Overview

The Good Vitamin Company, a UK-based leader in dietary supplements, turned to Zoho CRM to address its challenges in customer data management, telephony integration, and visibility into customer histories. Partnering with Rays and Reach, they implemented Zoho CRM and integrated it with tools like Zoho Books, RingCentral, and Zoho Analytics. This helped optimize operations, saving approximately \$50,000 annually.

## Executive Summary

- Client: The Good Vitamin Company
- Industry: Nutrition and wellness
- Headquarters: United Kingdom

The Good Vitamin Company is a leading provider of high-quality dietary supplements and is dedicated to promoting health and wellness worldwide and has been in the UK for nearly 50 years. With a commitment to sourcing the finest ingredients and adhering to stringent quality standards, they offer a diverse range of vitamins, minerals, and herbal supplements designed to promote overall well-being. Their products are formulated based on scientific research and manufactured in state-of-the-art facilities to ensure purity and potency.

## Problem Statement and Key Challenges

The Good Vitamin Company is one of four brands under its parent company, Vitamins Direct Group. Initially, the Good Vitamin Company used Odoo, primarily for order booking. Though it served as a decent accounting system, the company wasn't satisfied with its capabilities as a CRM tool; it could maintain customer information, it couldn't offer them complete visibility of customer history, and couldn't integrate with their telephony tool, RingCentral—two considerations which were vital to the D2C brand. This led them to use spreadsheets to track all the things Odoo couldn't.

## **Evaluation of the Problem**

Rays and Reach, a Zoho implementation partner, assessed the company's challenges and identified gaps in customer management, data visibility, and telephony integration. They proposed Zoho CRM as the ideal solution due to its customizability, affordability, and ability to integrate with existing tools.

## **Proposed Solution**

Rays and Reach, a Zoho implementation partner, customized the system to suit their sales agents' needs.

The company uses the Contacts module to manage all of their customer information. Their target demographic consists of customers over the age of 40—a demographic that prefers placing orders over the phone and relies on that same communication method to receive updates, too. By integrating RingCentral with Zoho CRM, sales agents directly call customers from the CRM interface.

Each week, agents are assigned a variety of customer types—including active, dormant, and reactive. Each agent handles approximately 9,000 customers. Sales agents use the Activities module extensively to track open and closed calls and pull call-based reports. This particular module provides complete transparency into each sales agent's efforts with each customer.

### **Tailoring the system to meet business requirements**

The team at the Good Vitamin Company has made thorough use of Zoho CRM's customizable layouts and fields, which detail the entire purchase history of each customer, the marketing campaigns that are targeted at them, and the products they might be interested in based on their recent purchases.

It also tracks information such as the last order date and the frequency at which each customer orders each product. A unique custom field calculates when a customer expects to run out of stock on a particular product—an indicator which helps sales agents identify opportunities to close sales by calling two weeks before stock runs out.

The team also uses a custom module to track which offers apply to which customers and which customers have taken advantage of those offers. They also make all their contact decisions using purchase history, customer preferences, callbacks, and prior notes—all available in the CRM

itself.

## **Optimizing processes through seamless integrations**

Once a sales agent makes a sale over the phone, they close the deal using a custom "Claim customer" button, which assigns the customer to the agent in Zoho Books. They then create a record in the Sales Orders module for the customer in Zoho Books to process the order. The company uses the integration between Zoho CRM and Zoho Books to manage invoicing and payments.

They've integrated Zoho CRM with Zoho Inventory to manage sales orders, packages, and shipping details, as well as with Zoho Analytics to derive data driven insights. However, to comply with GDPR requirements, sales agents are only allowed access to certain reports. Hence, Rays and Reach came up with a clever way to embed the reports that sales agents need as a web tab within Zoho CRM, improving both privacy compliance and efficiency.

By integrating Zoho CRM with Zoho WorkDrive, agents can access product specification documents stored in the online file management system directly from the CRM system as they're speaking to customers. Similarly, with Zoho Desk connected to the CRM system, agents can also see calls and emails received from customers regarding order-related inquiries, product complaints, and more—all within the same interface. The same applies to the integration with Zoho SalesIQ, which enables agents to track customers' engagement with the website and what products they've viewed in order to upsell/cross-sell to them.

The company's marketing team also sends out campaigns using Rays and Reach's custom Mailchimp integration and integrates it with Zoho CRM to track the information in the Campaigns module.

These integrations seamlessly capture details from other tools in Zoho CRM to provide a comprehensive view of customer data.

## **Implementation**

Rays and Reach developed and executed a comprehensive implementation plan over a period of four months to ensure a seamless transition to Zoho CRM. Within just three months of implementing the system, the company was able to see the results and benefits of optimizing Zoho CRM.

The implementation process included:

- Migration of customer data from Odoo
- Customization of CRM layouts and workflows
- Integration with essential tools, ensuring smooth transitions for sales and marketing teams

### **Customer Quote:**

"We chose Rays and Reach for their knowledgeable and pragmatic approach to system implementation. Their expertise has been instrumental in our achievements with the system."

– Ram Swamy, CEO, The Good Vitamin Company

## **Results**

The Good Vitamin Company experienced notable benefits:

1. **Annual Savings of \$50,000:** Achieved through reduced software and hardware expenses and optimized partner costs.
2. **Enhanced Efficiency:** Sales agents were able to manage 9,000 customers each, leveraging CRM tools to improve customer communication and identify upselling opportunities.
3. **Improved Processes:** Integration with Zoho Books and Zoho Inventory streamlined order management, invoicing, and payment tracking, leading to better inventory oversight.

### **Customer Quote:**

"As CEO, Zoho CRM's reports, flexible database, and user-friendly interface streamline my work tremendously. We've saved approximately \$50,000 per year compared to our previous ERP, considering both partner and software/hardware costs."

– Ram Swamy, CEO, The Good Vitamin Company

## ***Looking Forward***

The company highly recommends Zoho CRM and their implementation partner, Rays and Reach, to other players in the industry in search of a cohesive system for customer data and sales management.

## **Rays and Reach Solutions LLP**



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**For more on how Rays and Reach can help your business with Zoho solutions, please contact us.**