

W.T. Rawleigh Case Study

How W.T. Rawleigh leveraged Zoho One to transform their business operations and achieve digital transformation

Overview

W.T. Rawleigh, a leading supplier of health supplements, teamed up with Rays and Reach to improve their business operations. By adopting Zoho One, they streamlined everything from managing customer relationships to processing orders and handling finances. This change helped them run their business more efficiently, provide better service to their customers, and grow without facing major challenges. This case study highlights the problems they faced, the solutions they implemented, and the positive results that came from using Zoho One.

Executive Summary

- Client: W.T. Rawleigh
- Industry: Nutrition and wellness
- Headquarters: West Palm Beach, Florida, United States

W.T. Rawleigh, part of the Vitamins Direct Group, is a leading supplier of vitamin supplements in the US, offering products under three different brands Good Vitamin, Rawleigh, and Regina. Since 1889, the company specializes in nature-based health supplements, offering solutions for bone and joint health, immunity, energy, and overall wellness.

Their products are crafted with a commitment to quality, ensuring they meet the diverse needs of their customers. W.T. Rawleigh also prioritizes convenience, providing direct shipping and secure online shopping experiences.

Problem Statement and Key Challenges

The Company had been utilizing Odoo as a reliable accounting system, which effectively supported their business operations. However, to enhance their customer engagement and service, they identified the need for advanced operational and CRM features that were not present in their current system. Additionally, they sought to improve their communication capabilities with better phone system integration for efficient call tracking and recording. With a proactive approach, W.T. Rawleigh embraced the opportunity to evolve and began searching for a more robust system that could meet these expanding needs, demonstrating their commitment to

continuous improvement and customer satisfaction.

To overcome the challenges and achieve its digital transformation goals, W.T. Rawleigh partnered with Rays and Reach, a trusted Zoho partner with expertise in implementing cloud-based solutions for various industries. Rays and Reach helped them migrate to Zoho One, an integrated suite that covers the entire spectrum of business operations.

Evaluation of the problem

Rays and Reach evaluated these gaps, recognizing the need for a more comprehensive solution that could streamline processes, enhance customer interactions, and improve operational efficiency. By leveraging our Zoho expertise, we carefully assessed the challenges W.T. Rawleigh was facing with their previous system. After a thorough assessment, we determined that Zoho One would be the ideal solution to integrate their business functions, from CRM to finance, enabling seamless collaboration and enhanced customer satisfaction.

Why Zoho?

The W.T. Rawleigh decided to switch to Zoho for its business operations. They liked that Zoho is not only affordable but also customizable, unlike other ERP systems such as Dynamics and SAP. Based on past experiences, where being cost-effective and adaptable was crucial, Zoho emerged as the perfect fit for addressing their business needs.

Proposed Solutions

With the help of Rays and Reach, The W.T. Rawleigh's operations underwent a significant transformation. Rays and Reach provided them with a complete Zoho software solution, supporting their growth and overall success. This move gave The W.T. Rawleigh a competitive advantage in the natural health supplement market and boosted customer loyalty.

Zoho CRM:

Zoho CRM is like a control center for tracking their customers and sales. It stores lots of information about each customer, helping agents see who they've talked to, when to call them next, and what they like to buy. Agents can also organize customers based on what they've bought before, what they like, and how often they interact. The CRM integrates seamlessly with other Zoho applications, making it easy to manage everything in one place.

Zoho Desk:

Zoho Desk empowers the customer support team to address inquiries and tickets promptly. The integration of Sales IQ scripts on the company's website enables proactive engagement with website visitors through live chat functionalities. Moreover, customer inquiries received via email or chat are automatically converted into tickets within Zoho Desk, ensuring efficient resolution and tracking of customer issues. Integration of Zoho Desk with Zoho CRM provides a view to the Sales team about the issues raised by the customer.

Zoho Books:

Zoho Books serves as the financial management solution, handling invoicing, returns management, and accounting processes seamlessly. Orders taken by the sales agents are recorded as Sales Orders. Various custom functionalities developed allow sales agents to process orders that allow customers to redeem offers based on the offer availability, redeem reward points which have been accumulated over previous purchases, and also avail various other bundle pricings. Custom functionality has been developed for integration with Vertex for US tax calculations as well. Orders placed through the company's website are recorded as sales orders and invoices in Zoho Books using API integration. Integration with Zoho Inventory ensures accurate tracking of stock levels and facilitates smooth order fulfillment using packages and shipments.

Zoho Analytics:

Zoho Analytics tracks sales performance and commission payouts, and integrates with other Zoho apps for more insights. Zoho Analytics also helps the company assign agents to customers and segment customers for marketing and sales. Custom reports and dashboards show how to allocate customer accounts to agents based on criteria and metrics. Reports also show customer segments that need special attention, such as dormant customers.

Zoho Inventory:

Zoho Inventory enables comprehensive management of stock levels, product catalogs, and order fulfillment processes. It integrates with Zoho Books to ensure synchronization of inventory data and streamline the order-to-invoice workflow.

Zoho Creator:

Zoho Creator streamlines their batching process by collecting orders from online and phone channels, preparing the data for third-party warehousing, and pushing orders daily to the 3PL

providers via API based on brand fulfillment requirements.

The platform also manages the custom quality check process for procured materials. When a PO is issued and material is sent by the Vendor to the business, GRNs are recorded in the Creator application. Quality checks are performed, and QC reports and inspection reports are uploaded in Creator. Only then is the material deemed ready for use; they are pushed to Zoho inventory as Purchase Receives.

A custom process in the creator application is used to assign calls and customers to agents in the CRM based on the data from certain reports in Zoho Analytics.

Mailchimp Integration with CRM:

Custom integration built between MailChimp and Zoho CRM provides seamless movement of Customer information from CRM to MailChimp. A new customer is automatically added to MailChimp list and unsubscribes in MailChimp automatically flow back to CRM. Sales agents get a view of the customer's response to a MailChimp campaign within the context of CRM enabling them to make a better pitch to the customer during their interaction. Segment labels assigned by Zoho CRM Segmentation module is also pushed to MailChimp to enable rolling out of various email offers to Customers based on their segment label.

Zoho SalesIQ:

Zoho SalesIQ enhances customer engagement and lead generation efforts by providing real-time visitor tracking and proactive chat functionalities on the company's website. Agents can engage with website visitors proactively, address inquiries, and clarify their questions relating to product information, thereby enhancing the overall customer experience and conversion rates.

Zoho Cliq:

Zoho Cliq serves as the communication platform for internal team collaboration and coordination. The management team uses Cliq to communicate various offers and updates to the Sales team. Agents utilize Cliq to communicate updates, share documents, and collaborate on customer-related tasks in real-time. Group chats, channels, and file-sharing functionalities enhance productivity and streamline communication across departments.

Zoho WorkDrive:

Zoho WorkDrive serves as the centralized repository for storing, organizing, and collaborating on documents and files related to sales, marketing, and customer support activities. Agents can

access relevant documents, sales collaterals, and marketing materials securely from any location, facilitating seamless collaboration and knowledge sharing.

Implementation

The implementation of Zoho One for W.T. Rawleigh was completed in a swift and efficient manner over a period of 4 months. Our team at Rays and Reach worked closely with them to ensure a smooth transition and minimal disruption to daily operations.

Additional Services: We provided full migration services, ensuring a smooth transition from Odoo to Zoho One. Customization was a major focus, tailoring Zoho CRM, Zoho Books, Zoho Inventory, and other apps to meet their specific business needs. We also integrated the Vertex tax system and Mailchimp for email automation.

Results

- **Effortless Call Management:** W.T. Rawleigh seamlessly handles customer calls, tracking unresolved issues and ensuring prompt assistance for every customer inquiry.
- **Tailored Tools for Smooth Operations:** Customized functionality across multiple products that help in ensuring business specific processes. These enhancements help users do their tasks efficiently and have then adhere to the Company's processes and with fewer hassles, making everything run more smoothly.
- **Precise Tax Handling with Vertex:** Handles taxes accurately, especially for orders in the US. With Vertex's help, they ensure taxes are calculated correctly based on what's being shipped and where.
- **Enhanced Customer Satisfaction:** Improved call management and streamlined processes lead to higher customer satisfaction, fostering loyalty and positive feedback.
- **Cost Savings:** Switching to efficient solutions reduces expenses associated with manual processes and redundant software licenses, enabling resource allocation for growth opportunities.
- **Improved Compliance and Security:** Advanced features ensure better compliance with industry regulations and enhanced data security, maintaining customer trust and minimizing risks.
- **Scalability and Flexibility:** A scalable system adapts to evolving business needs,

allowing seamless expansion without disrupting existing workflows, ensuring operational efficiency.

The implementation of Zoho One has integrated and customized W.T. Rawleigh's systems the way they wanted. Their customer engagements are now smooth. Sales, inventory, and finance management have also improved, leading to more efficient operations.

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