Streamlining Operations and Enhancing Productivity with Zoho One at FormConnect

The Company

FormConnect is the best link between clients and formwork solutions. The company provide modular formwork, climbing formwork, fair-face concrete ply H20, and birch ply to establish the formwork brand.

With a dedication to formwork quality, they provide a team of experienced specialists that have successfully managed many complex projects.

The firm promote continuous learning and progress in the client businesses beyond formwork services. Through rigorous training, the firm ensure their clients' formwork teams prioritise safety in implementation, maintenance, assembly, and operation.

FormConnect is a trusted formwork supplier that builds industry relationships. The extensive formwork expertise and experience allow them to confidently tackle even the most difficult and huge jobs. It promotes safety across formwork engineering, not just formwork services.

The comprehensive training programs help client companies build skilled formwork teams that can deploy, maintain, assemble, and operate formwork safely.

The Challenges

Form Connect used a combination of separate tools and systems for various functions—CRM for sales, spreadsheets for project management, email for communication, and separate ticketing software for customer support. As a result, the company lacked a unified view of customer interactions, sales pipelines, support tickets, and project statuses.

Many tasks, such as data entry, lead follow-ups, ticket routing, and reporting, were performed manually. This resulted in significant time spent on repetitive, low-value tasks and increased the likelihood of human error.

Customer service teams struggled to track tickets and customer queries effectively. Without a centralized platform like Zoho Desk, it was difficult to monitor ticket statuses, assign tickets to the right team members, and ensure timely follow-ups.

Managing projects manually, with limited tools, led to challenges in tracking progress, setting deadlines, and allocating resources. This lack of clarity contributed to missed deadlines, disorganized workflows,

and dissatisfied clients.

Generating reports and tracking key performance indicators (KPIs) was a hard process.

The legacy systems in place lacked the flexibility needed for growth. As Form Connect expanded, the manual processes and disconnected systems became more challenging to manage. The company faced difficulties in scaling operations efficiently, leading to increased complexity and potential for error.

The Solution

With the Tangible team, Form Connect decided to integrate Zoho One, The suite included Zoho CRM, Zoho Desk, Zoho Mail, Zoho Projects, Zoho Analytics, Zoho Forms, and others. This solution was chosen for its ability to:

- Centralize data from sales, customer service, marketing, and project management.
- Automate workflows to decrease manual involvement and increase productivity.
- Improve teamwork by exchanging information in real time across departments.
- Provide comprehensive analytics to enable data-driven decision-making.

Zoho CRM enables automated lead management, sales monitoring, and customer relationship management. It linked with other systems to offer real-time visibility into the sales funnel and client interactions.

Zoho Desk aims to centralise customer care and automate ticketing, routing, and follow-ups. This enabled the support team to track client complaints, resolve them faster, and increase customer happiness.

Zoho Projects automates project management workflows, task allocations, progress monitoring, and deadlines. This gave project managers real-time visibility into project statuses

Zoho Analytics combines data from numerous sources to create meaningful reports and dashboards for real-time decision-making. This enabled teams to evaluate performance across departments swiftly.

Zoho Mail and Zoho Forms help to streamline internal and external communication while also automating data collecting and procedures. Zoho Forms automated the collection of data from leads and customers, which was effortlessly incorporated into Zoho CRM.

Benefits After Implementation:

- Improved Efficiency and Reduced Manual Efforts
- Centralized Data and Better Collaboration
- Faster Response Times and Enhanced Customer Experience
- Real-Time Project Tracking and Improved Resource Management
- Data-Driven Decision-Making:
- Cost Savings

Conclusion:

The successful installation of Zoho One at Form Connect resulted in the streamlining of company operations, the reduction of inefficiencies, and the enhancement of cooperation across teams.

In addition to lowering its operating expenses, the firm was able to enhance its customer service, sales, and project management capabilities through the implementation of essential process automation and data centralization.

The benefits were especially noticeable in the areas of quicker decision-making, enhanced client experiences, and improved resource management.

With continuous usage and further improvements, it is anticipated that Zoho One would be able to support the expansion of Form Connect and further accelerate the company's efforts to modernize its business infrastructure.

About Tangible Analytics Consulting

Tangible Analytics Consulting is a management consulting firm; we provide specialized consulting services, software, research, and outsourced grant writing and administration to government institutions and decision makers. We emphasize the data to develop strategy which has been shown to assist clients achieve specific goals and improving process efficiency. Our skilled staff tries to provide personalized, sensible solutions in a timely and high-quality manner.

We made contracts with municipalities and corporations to provide the best customer service and most effective Zoho Integrations or custom applications. As an Zoho partner, we've developed over 30 custom applications, become certified in a number of Zoho programs, and assisted over 70 clients with system

integrations, including off-the-shelf solutions like Zoho One, and integrations with other third party services via rest API.