Brigade Plus
transforms sales management
and customer journeys
with Zoho CRM

BRIGADE

Zoho
CRM

THE COMPANY

The experience of buying and owning a house is a memorable one. Brigade Group understands this and prides itself on delivering on exceeding customer expectations in the residential and commercial sectors through its quality-driven approach. Customer satisfaction is at the core of Brigade Group's philosophy. That's why they believe in continuously improving their processes to deliver excellence in their workmanship, design, and overall project delivery.

Brigade Plus is an extension of that philosophy. It's a thoughtful initiative that offers customers a holistic home-buying experience and serves as a one-stop solution for all interior designing needs, including modular kitchens, electrical fittings, wardrobes, and smart homes—all while maintaining high standards of quality assurance.

"Our thought process behind Brigade Plus was to add value to our customers' buying journeys, whereby when customers purchase a property, they leave with not just a house, but a true home," says Ponappa PM, Assistant Vice President at Brigade Group.

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The challenge

Placing customers at the heart of digital transformation

Having been with Brigade Group for over 14 years, Ponappa has gained a fair share of experience working with different business software tools, including legacy applications like MS Excel, Salesforce, and now SAP C4C (SAP's Cloud for Customer Management). He's noticed that certain applications, such as MS Excel, are highly susceptible to human error. Additionally, Salesforce has also proved to be lacking in the level of customization Brigade Plus needs, and other platforms like SAP C4C present their own challenges due to their complex configuration processes.

Accordingly, Ponappa decided to deploy a system built completely on Zoho CRM to give their team a unified view of the customer journey and engagement across multiple applications—all in a single platform.

"What I wanted," Ponappa says, "was to achieve a system that enables our team to deliver an exceptional customer experience, so that the Brigade brand is always a positive association for our customers."

A glimpse into the evaluation process

In 2019, the team at Brigade Plus, guided by their core value of customer centricity, evaluated Zoho CRM and Salesforce based on two primary criteria: user experience and user interface. They sought a user-friendly CRM system that would encourage adoption and minimize the learning curve.

"Our focus on the user interface was driven by the understanding that the biggest tech failures often occur due to adoption issues," Ponappa says. "We simply couldn't afford to let that happen."

It was essential for Brigade Plus to create a user interface that eliminated confusion and ambiguity, making it effortless for individuals to use the product.

"Zoho CRM aligned perfectly with our vision," Ponappa says. "Its intuitive interface and user-friendly design allowed our team to seamlessly adopt the CRM system without any confusion or a steep learning curve," Ponappa says.

Other important factors Brigade Plus took into account during the evaluation process were the available **functionality** and **customization** options—specifically, features related to sales automation, reporting, team collaboration, and business process management.

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"One of the reasons we chose not to go with
Salesforce was its limited customization options.
In contrast, as I began configuring the product
and delving into its functionalities, I found that
Zoho CRM offered a higher degree of flexibility
and customization. In fact, within the first
few weeks of using the system, I even started
learning Deluge, Zoho's scripting language, which
enabled me to better understand the extent of
customization possible. This familiarity gave me
confidence in the system's ability to handle the
work we needed it to perform and solidified our
decision to choose Zoho CRM."

Ponappa PM
Assistant Vice President, Brigade Group

Zoho CRM

Brigade Plus also looked at Zoho CRM's **ability to integrate** with other essential business systems, such as SAP C4C (which they used for their residential business), their payment gateway, team collaboration tools, and customer support tools.

"If I didn't have the confidence in Zoho CRM that it could integrate with other systems, that would have been a deal breaker for me," Ponappa says. "All the integrations in Zoho CRM have been working quite well. The information flows seamlessly and has given us an accurate and unified view of customer data."

Finally, an equally significant factor they considered during the assessment was the aspect of **data security and vendor reliability.** Ponappa, along with the company's IT team, thoroughly examined Zoho CRM's security features and privacy policies before making the final decision to select Zoho CRM.

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"As a customer, one of the most significant factors that drew me towards Zoho was the fact that it's an Indian company. This aspect held considerable importance to me. I deeply value the positive impact Zoho has made in terms of employment opportunities, particularly in small cities and towns across India. This narrative aligns with my belief in nation-building, and it genuinely resonates with me."

Ponappa PM
Assistant Vice President, Brigade Group

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The solution

Automating the sales process end-to-end in Zoho CRM

The teams at Brigade Plus that actively use Zoho CRM are the pre-sales team, sales team, the design team, and the customer relationship management team.

Driving sales and team productivity with sales automation

Brigade Plus has automated and streamlined its sales process entirely using Zoho CRM. Via Brigade Plus's Zoho Creator integration, they push existing customers from the residential segment—tracked via SAP C4C—into Zoho CRM as leads. Using custom fields, they move important customer details into Zoho CRM, including details like each project's name, block name, unit number, unit size, unit configuration, and other details relevant to the real estate industry. This customization ensures that the sales team has all the necessary information to engage with leads effectively and successfully sell interior packages.

Depending on the type of the project and the skill sets attached to each member in sales, the lead is then assigned to a sales team member on a **round-robin basis.**

The company has implemented **scoring rules** to help the sales team prioritize leads according to customers' predicted levels of interest based on their interactions across various touchpoints.

Contacts receive automated emails upon lead creation, which provide relevant information and the assigned sales member's contact details. To create tasks automatically based on customer actions like opening and clicking emails, requesting meetings, or calling back, Brigade has set up **workflows.**

Brigade Plus's sales interactions with prospects occur through emails or phone calls, for which the team leverages Zoho CRM's **template functionality.** To address the common issue of maintaining consistent and high-quality communication within organizations—and despite having dedicated marketing personnel—Ponappa wanted to empower Brigade Plus's frontline salespeople with the ability to communicate effectively. To achieve this, the team utilizes pre-designed email templates with customizable variables. By selecting the relevant information—such as customer names and other variable data—they ensure consistency and maintain control over the quality of information they convey to customers.

Integrating a telephony system like Ozonetel with Zoho CRM has helped Brigade Plus streamline communication and improve sales efficiency. When a customer contacts them, the call is routed through the **Ozonetel-Zoho integration.** If the customer has previously spoken to a specific salesperson, the call is routed directly to that salesperson, whereas if the customer hasn't interacted with anyone previously, the call is assigned to a salesperson on a round-robin basis. Furthermore, all calls are recorded and available for review within Zoho CRM, providing enhanced customer insights. The team also benefits from real-time reporting on call activities, such as the volume of incoming and outgoing calls, call duration, call outcomes, and more.

"Without this integration, we would lack accurate and up-to-date data on our team's call-related activities and tasks," Ponappa says.

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"The biggest advantage of Zoho CRM is access to a 360-degree view of our customers. It allows me to stay on top of our entire sales process through one single interface, making our lives easier. It helps us track and manage leads, manage communications with customers, collaborate across teams and departments, and prioritize our high-value deals."

Anand Rangrej
Head of Sales, Brigade Plus

18 hrs
Time saved per
week on day to day
sales activities

100%
Adoption rate
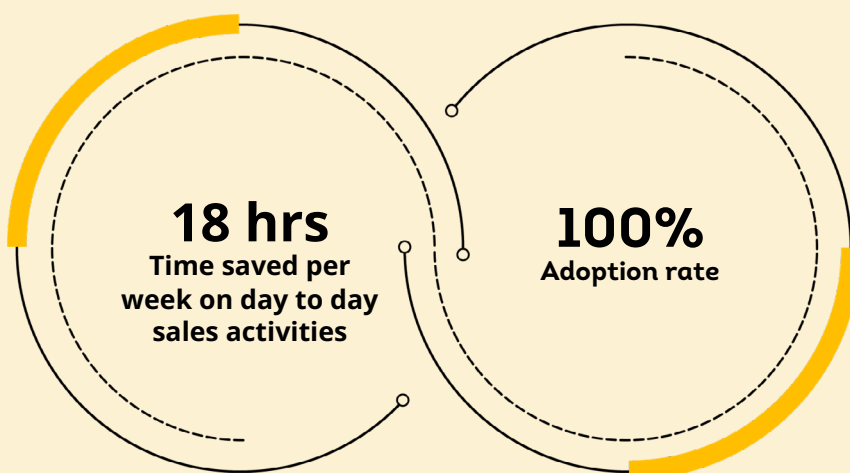
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Enhancing operational efficiency through streamlined business processes

Brigade Plus's entire business process is carefully designed using Zoho CRM's **Blueprint feature,** which guides leads from the initial sales stage to the design stage, and ultimately to the payment process—which the customer relations team oversees. They've strategically placed checkpoints throughout the process to ensure that salespeople gather all essential information during their interactions with customers. Designers then review these details once the customer reaches the design stage. The process is defined systematically to prevent the skipping of stages, with automated alerts facilitating smooth transitions between stages and teams. Certain actions are also restricted based on user profiles to maintain control over data access.

Fostering customer satisfaction through seamless integrations

Ponappa envisioned a centralized system that consolidates customer data from various platforms and enables Brigade Plus teams to offer an exceptional customer experience. Brigade Plus achieves this through a seamless **integration between Zoho CRM** and **Zoho Creator,** which enables them to regulate the flow of information from SAP C4C to Zoho CRM. The integration involves utilizing Zoho Creator as a data lake, where all data is stored, and only relevant information is pushed into Zoho CRM. This ensures the sales team has all relevant information before engaging with customers.

"This approach was necessary because SAP C4C alone couldn't determine which information should be integrated into Zoho CRM," Ponappa says. "By implementing Creator as an intermediate layer, the team can selectively choose the unit-related information that needs to be transferred to CRM, effectively finding a middle ground in the integration process."

Furthermore, the integration enables the team to update specific fields in Zoho CRM. Using Zoho Creator, Brigade Plus has implemented a "Call" button in Zoho CRM that automatically cross-references data in SAP C4C to ensure the information stored in Zoho CRM is accurate and up to date.

Another important integration Brigade Plus uses is between Zoho CRM and Razorpay, their payment gateway. This integration enables the sales team to track and determine which type of payment link to send to customers and enables Brigade Plus to provide its customers with a smooth payment experience.

Brigade Plus has also integrated **Zoho CRM with Zoho Survey,** which enables them to share an NPS surveys with customers and collect valuable feedback related to the overall experience. This integration completes the loop for the sales and design processes, and facilitates continuous improvement and customer satisfaction.

To enhance customer support and communication, the team has integrated Zoho Desk, Zoho CRM, and Zoho Projects. Whether customers send escalations via email, the support page, direct calls to assigned salespeople, or the customer portal, the system automatically generates a ticket for swift resolution. They primarily use Zoho Desk to record and respond to customer escalations, while their integration with Zoho Projects enables site-level members to track and resolve issues effectively. One of the key features in Zoho Desk that has helped Brigade Plus is the knowledge base feature, as it provides customers with self-service options and reduces the burden on team members to address common inquiries. The **integration between Zoho CRM and Zoho Desk** ensures the synchronization of contacts and maintains a comprehensive history of customer interactions, all conveniently accessible within a single view.

Lastly, **the integration between Zoho CRM and Zoho Projects** eases the transition from the design and customer relations teams to the operations team, who are responsible for project execution. They use certain parameters to determine the conditions for project creation, such as design approval from the customer and the receipt of 40% of the required funds. When these conditions are met, relevant data is pushed into Zoho Projects via the integration with Zoho CRM, creating a new project record that is then assigned to the operations team.

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"In traditional companies, information loss often occurs as communication moves between departments. However, when using Zoho CRM, I observed a significant improvement in this aspect. We were able to monitor and consolidate information effectively, eliminating the loss of critical data. This enabled us to track and access important information seamlessly."

Nilesh Roy

Assistant General Manager - Design & Operations, Brigade Plus

Zoho **CRM**

Empowering sales with Zia

Brigade Plus counts on Zoho CRM's built-in AI sales assistant, Zia, to enhance the quality of communication with their customers. Zia has significantly transformed the way the Brigade's sales team operates by introducing intelligence at different stages of the customer journey.

Smart scheduling for higher engagement

Zia tracks when customers respond to emails or answer calls, recording the time of response, how long the customer takes to reply, and the time of day they're most likely to engage. Based on this data, Zia suggests the optimal times at which sales reps should send emails or make calls in order to maximize the likelihood of receiving a response. This feature has proven invaluable in boosting individual team members' success rates. As a result, conversion rates and positive customer responses have consistently improved.

Elevating communication with Zia and ChatGPT

At Brigade Plus, sales reps leverage Zia's smart prompts, powered by ChatGPT, to draft personalized emails quickly and respond with more precision. Zia's intelligence also helps users identify the emotion and intent behind every email and call by analyzing its content. This not only improves turnaround times but also elevates the professionalism of every interaction. It's especially helpful for sales reps who are non-native English speakers.

Simplifying and summarizing complex emails

Many customer emails tend to be long-winded or poorly structured, which sometimes causes sales reps to overlook key requests. Zia helps extract and highlight the main points of emails to make them instantly more understandable. This has been critical in avoiding miscommunications and ensuring accurate, timely follow-ups at Brigade Plus.

Benefits of optimizing Zia

Zia has become an integral part of the sales workflow at Brigade Plus. With Zia in place, Brigade plus has achieved the following:

- Faster and more professional responses

- Improved communication quality

- Higher lead engagement and conversion rates

"Zia has been incredibly beneficial in boosting our sales and support team's productivity and improving the quality of communication. It helps us respond faster and sound more professional, and ensures we never miss key customer requests."

Ponappa PM
Assistant Vice President, Brigade Group

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Utilizing real-time reporting for data-driven decision making

Zoho CRM's **reporting functionality** helps Brigade Plus gain valuable insights into sales and team performance. With 40+ dashboards with key metrics, they gain the necessary information to make informed decisions, enhance sales effectiveness, and drive business growth. These metrics include metrics such as the number of assigned leads, converted leads, won leads, lost leads, and closed deals on a weekly, monthly, quarterly, and yearly basis, as well as deal dropoff rates and more.

35+ Hours
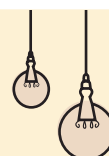**Routine tasks tracked by each team**

4 Hours
Average time saved per week on creating reports by design team

36 Hours
Time saved per month on creating sales reports

Uplifting team spirit through recognition and celebration of collective and individual efforts

Ponappa understands the importance of keeping the team motivated and focused. By using Zoho CRM's **Motivator feature,** they've set goals for quarterly sales that enable them to track and celebrate the achievements of individual salespeople in terms of targets, projects, and value.

Implementing Zoho CRM

Step 1:
The team at Brigade Plus meticulously planned the implementation process, starting with clearly defining their business requirements and evaluating various CRM options.

Step 2:
The team then proceeded by creating a comprehensive scope document that outlined their business processes and system needs (all the systems that comprise the business).

Step 3:
The team collaborated with the Zoho team to ensure Brigade Plus's vision aligned with the platform's architectural capabilities. After getting the go-ahead from Brigade Plus, the development phase commenced, accompanied by thorough testing at different stages.

Step 4:
The team successfully migrated data (in Excel) from SAP C4C to Zoho CRM using Zoho Creator, making the data migration process straightforward.

Step 5:

The training approach they employed emphasizes on-the-job learning that's tailored to the unique functionalities of each team. To facilitate this, the team has designated one or two super users in each department who now act as trainers for newly onboarded members. The training process combines on-the-job training, shadowing, and clarifications as required. This comprehensive approach ensures that new team members acquire the essential skills and knowledge within their specific work contexts.

4 MONTHS

Time taken to implement zoho including various integrations
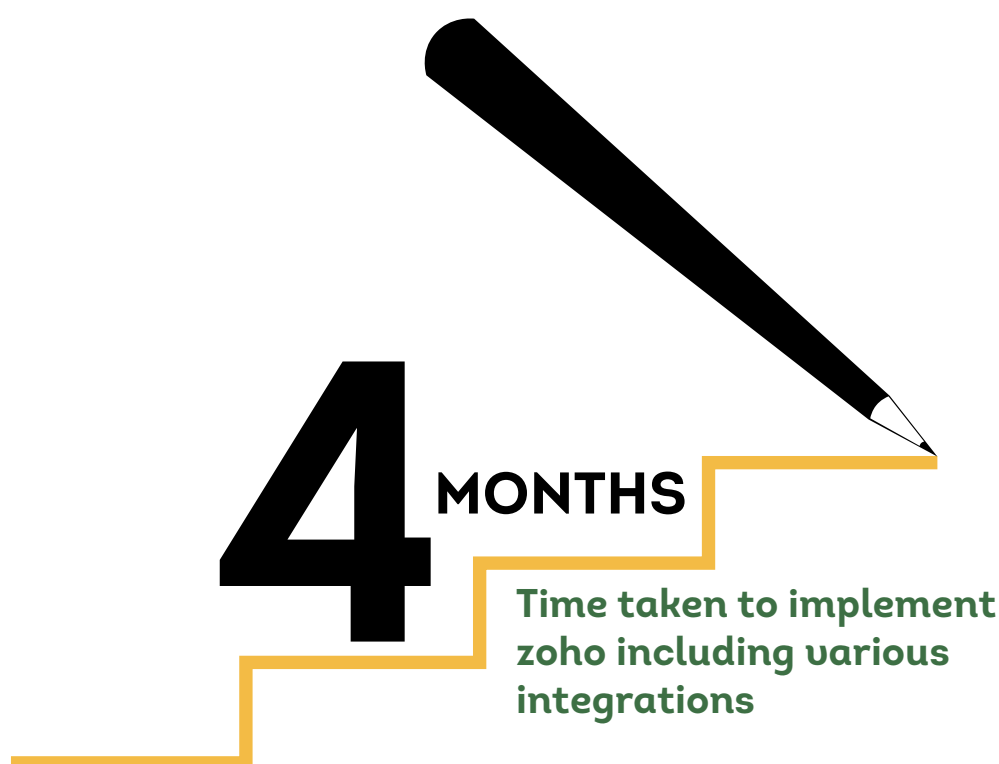
"Zoho CRM's modular approach allowed us to test and refine the system as new functionalities became available," Ponappa says. "The entire implementation journey was guided by thoughtful planning, effective communication, and a focus on scalability. Thanks to Zoho CRM, we successfully integrated third-party applications and achieved our desired outcomes."

Zoho CRM

Benefits and ROI

Zoho's impact on Brigade Plus's journey

Brigade Plus witnessed a significant impact within just six months of adopting Zoho. Ponappa recalls a memorable moment that vividly demonstrated Zoho's true value: "We recently received valuable feedback from a customer who was amazed by the convenience of closing a transaction on their mobile phone."

Through Zoho CRM, Brigade Plus sent all necessary documents seamlessly via email—which enabled the customer to view them on their mobile device—and provided a payment link for quick mobile payment. Within moments, the customer received a receipt.

"This rapid transaction was a game-changer for us, as legacy companies traditionally take three to four days to issue receipts," Ponappa says. "The customer's satisfaction and their words of praise to our salesperson affirmed our decision to choose Zoho. While we may not always receive active feedback, our customers consistently appreciate our efficient communication and touchpoints, as facilitated by Zoho CRM."

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1:4
Cost-to-Benefit ratio

70%
Direct Benefits

30%
Indirect Benefits

Ponappa highlights that the return on investment with Zoho was fourfold. Some of the direct benefits they observed include reduced lead cycle closure times, increased customer touchpoints with leads, and more data points for reviewing customer transactions, whereas indirect benefits include enhanced customer satisfaction through automated touchpoints at different stages, standardized communication for consistent brand messaging, and improved customer happiness and brand recall.

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Looking forward

Brigade Plus aims to transition their business operations to Zoho fully, covering every aspect from quotation generation and invoicing to payment collection and accounting. Their primary objective is to ensure a seamless customer journey throughout the entire process.

"Zoho plays a crucial role in enhancing our customer experience and streamlining internal processes, including bookkeeping and accounting," Ponappa says. "Our intention is to evaluate Zoho for all future business needs."

Zoho **CRM**