



Case Study

Simply Asset Finance

Simply—

Brief summary —

Simply began its journey with Zoho CRM just over 3 years ago when it was in its early stages. Starting with a blank sheet of paper as a start up in 2017, to begin with processes had the potential to be very manual. The introduction of Zoho CRM into the business enabled Simply to have a centralised and secure way of managing customers and pipeline, ensuring that the dream to launch a 'cloud first' start up in the finance industry became a reality.

A year into the Zoho CRM journey, Simply switched to Zoho One to further enhance the customer journey and to build on efficiencies internally, by taking advantage of the full suite of products available.

Zoho is a core part of the tech infrastructure within Simply and is utilised by all areas internally. The Zoho One platform has enabled Simply to be innovative with the way it provides applications and automation throughout, ultimately making them stand out in what is traditionally a manual, process heavy industry. To date, Simply has now implemented CRM, Cliq, Sprints, Social, Assist, Forms, Survey, Campaigns, SalesIQ, Phonebridge, Flow, WorkDrive, Desk and Projects as both tactical and strategic solutions.

The company —

Simply—

Simply is a 100-person strong asset finance company in the UK. Founded in April 2017 by a team of asset finance specialists, Simply recognised the need for innovation and disruption in the sector.

Fastest growing asset finance provider:

Simply is now the fastest-growing lessor and equipment finance company in the UK (88% growth). It is placed at number 39 in the AF50, the UK's most influential annual survey of business and equipment lessors, up from number 44 in 2019.

Much-improved user experience for SMEs requiring funding:

Simply has revolutionised customer journeys and provides a faster, more efficient process to its customers and partners. Simply has helped over 3500 customers across a variety of sectors including manufacturing, construction, transport and recycling.

The challenge —

Simply's technology enables the company to achieve its goals in providing customer-driven solutions and uses innovation to differentiate in the marketplace.

The technology tools in place need to enable scalability to serve the fast-growing company both within the business as a whole and then specifically for technology. Simply needs to be able to operate with speed and efficiency in every aspect - that includes change.



Simply also looks to offer a different employee experience to others in its industry and technology helps it empower and enable its staff to do things differently with ease and speed.

For continuity and resilience, Simply decided to spread its data across different systems while ensuring minimal restrictions when it comes to maximising opportunities from the data collected. Therefore, systems offering easy integrations and easy maintenance were key to avoid burdening a lean team or adding additional expense.

It has looked to technology to help achieve this and provide a refreshingly different solution in its marketplace.

Simply's technology team used a Zoho partner to implement CRM and to migrate to Zoho One. However, since then it has implemented the further thirteen apps in-house.

The strategy —

Simply selected Zoho One to help meet many of its challenges for several reasons:

- Depth and breadth of solutions available within one suite.
- Value - extremely competitive price point for a business suite of applications.
- Scalability - all apps able to scale quickly and grow with the company.
- Ease of integration as the company uses multiple systems.
- Simplified billing instead of managing multiple subscriptions and vendors.
- Reduced administrative overhead as the technology team is small and wanted to focus on building core solutions rather than just managing applications.
- Ease of internal development and customisation.

Customer experience



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Customers are our focus at Simply and being there for our customers come rain or shine has always been our aim from the start. With Zoho we are able to configure automatic notifications and messages to our customers to remind them of key information or let them know we are here. It's things like this that allow us to go above and beyond customers' expectations and gives us the competitive edge.

Charlotte Downing,

Head of Business Support, Simply.

Zoho has made a significant contribution towards helping Simply achieve its vision of keeping the customer at the heart of everything it does:

- ✓ Zoho CRM acts as the single source of the truth for every account and customer and is connected to most Simply systems, both purchased or bespoke. It provides details of potential opportunities through to contracts, and leads through to customers, along with all associated notes, cases, activities and assets.

- ✔ Zoho Phonebridge makes it easier and more efficient for all of the Simply team to handle calls through the system, monitoring call volumes and missed calls, thus helping Simply understand demand and prioritise accordingly. Zoho Phonebridge has also helped with customer service across departments. Simply's employees can immediately address customers by name and have all their details in front of them which, even when dealing with difficult cases, can help to get a tricky conversation off to a better start. Finally, Phonebridge has provided the Simply Sales Team with another sales tool. From being able to call prospective clients through the system, it has enabled them to focus on the call at hand and easily record notes and future activity.
- ✔ Simply uses Zoho Campaigns to build engagement. It sends out weekly stock lists to customers who may want to purchase equipment. It can then monitor the impact of website views using Zoho Sales IQ to enable more personalised follow up sales calls, resulting in more closed deals. It is also used for customer communication automation. For example, for regular and repeatable communication such as email notifications for things like welcome, updates and anniversary emails that help Simply build and maintain relationships. Automating simple communication gives Simply more time to enhance its service through offering a first-rate personal touch during the customer's journey with them.
- ✔ Simply has added efficiency and improved collaboration between different teams through its use of Zoho Flow to automate tasks between tools. When a new Workdrive folder is created, the system will auto-generate a link to be sent onto the customer or broker for them to add all the required documents. It reduces emails and eliminates back and forth requests for information, as everything relevant is available for access to the right people.

Business growth

- ✔ Simply's sales leadership team has real-time visibility into the performance of its sales representatives. It can be used to set goals to make it easy for any team member to see instantly where their focus should be.
- ✔ Having Zoho CRM in place ensures that everyone has access to the required data on Simply Accounts and customers, allowing time to be focused on business growth rather than looking between systems to find key information.

Key benefits —

Cost reduction/higher profits



Zoho One has saved us time, effort and large amounts of money by providing us with easy to deploy, scalable solutions that continue to offer extra functionality day by day.

Andy Trimmer,

Head of Technology, Simply.

Simply has been a Zoho One customer for over two years. It sees huge benefit any time a new app is introduced. For example, when Zoho Flow was introduced, the technology team found it better than other solutions in the marketplace. It connected with the systems the team wanted to trial and automated processes using multiple systems. Without incurring additional license costs, Simply was able to introduce new processes easily and replace manual processes.

Adding any new application from Zoho One brings more value for the same investment. The new applications integrate seamlessly, instantaneously and scale with new users, without additional spend. This allows Simply to avoid having to spend time and money on researching and sourcing other systems, dealing with integration, configuring multiple products, managing an array of licenses from different vendors, and continuously maintaining products to ensure they work with the rest of their systems. Simply estimates this has saved them both time and money.

Efficiency frees time for strategic focus

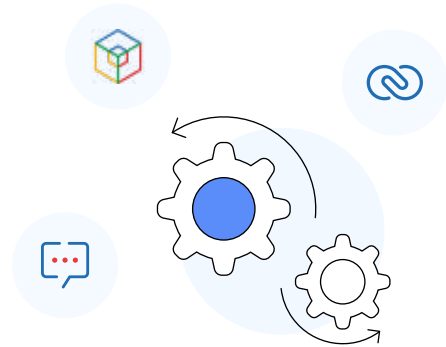
Simply is a constantly changing business and Zoho Projects helps it to manage that across the entire business. This, along with using Zoho Desk to support the business, enables the technology team to help manage this change while remaining lean. Around 70% of the technology team's time is spent on changing the business and 30% on running it. Both aspects can be done efficiently using Zoho's tools.

Scalability

Simply has grown quickly while using Zoho products and has the solutions to fully support its needs. The team is confident Zoho will continue to enable agility and flexibility and provide the ability to help it operate with speed as it continues to grow.

Speed of implementation

Simply used a Zoho partner to implement Zoho CRM and to migrate to Zoho One, but the implementation of further applications has been handled in-house. Speed of implementation has been impressive with around two weeks for Zoho CRM and around the same for Zoho Cliq.

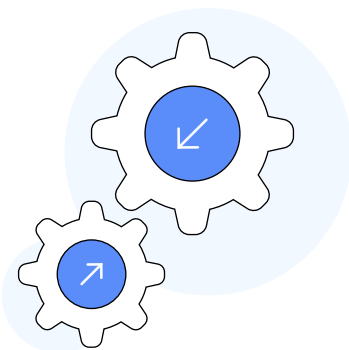


Zoho serves as an ‘enterprise bucket to assess new software’ - if we need something new, we’ll always look to see if Zoho One has something available.

Andy Trimmer,

Head of Technology, Simply.

Ease of integration



Simply uses different providers for other aspects of running its business. One of the benefits of using Zoho is the ease of integration with other providers. Simply integrates several applications into Zoho One to get a holistic view of data from its various sources. Contract and proposal management systems feed back into CRM to enable the team to see progress of opportunities.



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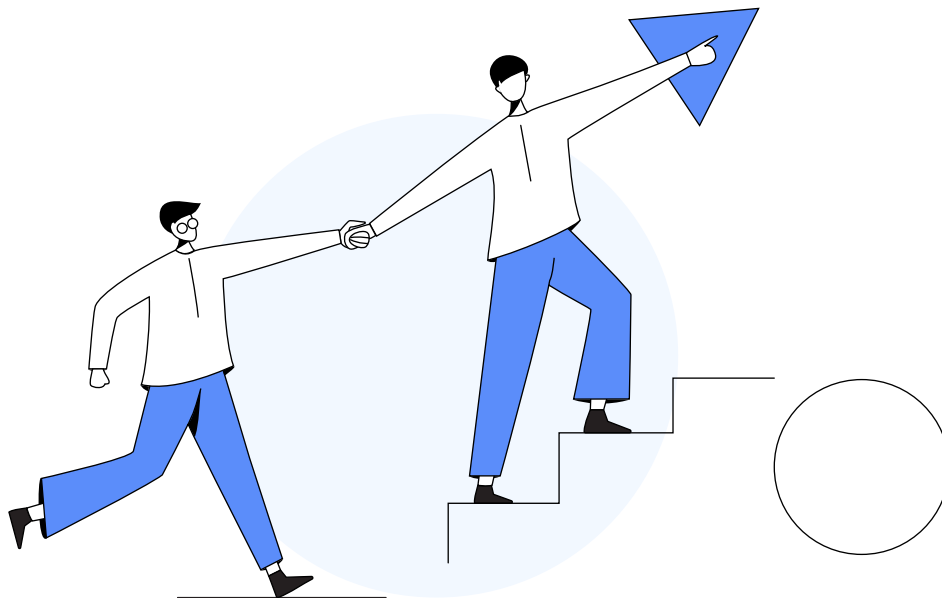
Zoho Flow turned out to be a pretty powerful tool for us. We will be looking at Orchestly going forwards to help further orchestrate some of those manual processes we have.

Andy Trimmer,

Head of Technology, Simply.

Future and longer term vision —

Through the pandemic, Simply has stayed on track with its programme of change. It plans to continue to build on providing excellent customer and employee experience. It will continue to differentiate through the use of technology to enhance agility, speed of operation, accelerate growth and scalability.



Simply will focus on driving more value out of use of data to, for example, further enable its sales team to locate prospects and drive efficiency in business development.

Overall, Simply will continue to seek new innovation to strengthen its market position further.

Simply's successful adaptation in the era of COVID-19 —



We have, like many others, had to adapt to the new circumstances since COVID-19 hit, but remain focused on a different sort of customer service and experience. We are still working towards goals we set before that around things like customer communication improvements. These will continue to improve our competitive edge. The agility of systems such as Zoho meant that we were able to continue the work that enhances the service we offer and keep us ahead of our competitors.

Andy Trimmer,

Head of Technology, Simply.

Simply Asset Finance found Zoho to be a great help during these unprecedented times for businesses. First of all, like many others, the entire company had to switch to working from home and saw no interruption to how it operates as a business or what it could do with its use of Zoho tools.

The flexibility and speed from use of Zoho tools enabled Simply to quickly adapt and serve new customer demands that arose from the pandemic. This level of speed and service pleasantly surprised customers in a time when they needed service levels to be high.



When the pandemic hit, we had to do some things to help out customers very, very quickly. Whilst we got those in place, working disruption has been minimal to our change strategy and most of our plans are still in line with the original timelines we set. That's come from using tools such as Zoho Projects, Desk, CRM and being able to make those changes so quickly. We did not halt our business while all of this was happening. We're not redefining business as usual – we're doing business as usual. The only difference is that we are sat in different locations.



— **Andy Trimmer,**

Head of Technology, Simply.