



Greg Sheppard Engages GoldenLion to Implement Packers & Movers CRM

COMPANY PROFILE

Greg Sheppard is the Owner of Elite Moving Services, one of the leading moving companies offering all around moving and storage services. Greg started Net Move Atlanta, a sister business of Elite Moving Services over a decade ago with the aim of offering stress-free, hassle-free and seamless moving experience to families. With sheer dedication, hard work and commitment towards customer satisfaction, Net Move Atlanta grew into a full service moving company from a small moving van operation.



Ensuring 100% customer satisfaction has always been the number 1 priority for Greg. Thus, with the growing business, he started looking for a CRM system to keep track of every single customer as well as lead and maintain all around co-operation within his team.

PROBLEM AREAS

Thus, around three years ago, Greg started exploring various CRM software. After considering a number of options, he zeroed in on Zoho CRM for its simplicity, flexibility and cost effectiveness. However, after purchasing the product, setting it up and customizing it for his business was a challenge. After looking around the application a bit, Greg decided it was time to seek help from professionals. So, he started looking for a company who can customize his Zoho CRM and tailor the same for the requirements of his business. He also wanted to automate quote generation and wanted to generate bespoke quotes for each client, direct from the CRM system.

Problem Areas

- ❖ Setting up ZOHO CRM.
- ❖ Customizing ZOHO CRM to meet unique business needs for packers and movers.
- ❖ Automated quote generation right from CRM.

After talking to one or two companies, Greg came to know about GoldenLion and post initial discussion he offered the job to them.

GOLDENLION OFFERS CUSTOMISED CRM SOLUTIONS TO ADDRESS THE PROBLEM AREAS

GoldenLion not only customized Zoho CRM for Greg, but also created a module on Zoho Creator platform for generating automated quotes from the CRM itself. The application took into account the complex calculations of packaging cost, moving cost, storage cost etc and generated awesome looking quotations for each of Greg's clients.

Solutions Offered:

- ❖ Customized ZOHO CRM
- ❖ A tailor-made module created on ZOHO Creator platform to create automated quotes from CRM
- ❖ Automated e-mails from CRM, requesting testimonials.

created auto-generated follow up tasks post e-mail campaigns. Moreover, the campaign tool customised by GoldenLion ruled out any scope of duplicate campaign or contacts and thus made the system completely error free.

“We created a complete automated process for generating quotes right from the CRM. This way, Net Move Atlanta is not only saving a lot of time, but also being able to generate 100% accurate quotes with complete transparency for their clients”, mentioned Mr. Arnab Bandyopadhyay, Director, GoldenLion.

Later, GoldenLion further customized the Zoho CRM to send automated emails with landing page links through which customers of Net Move Atlanta can submit their testimonials.

To sum it up in the words of Greg Sheppard, Owner, Net Move Atlanta, “GoldenLion has always been there to offer services and solutions whenever needed. They not only offered the solutions for the problem areas I was facing, but also went overboard to offer highly customized services that added value to my business. I’m definitely looking forward to work with them again.”



Greg Sheppard
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Contact Us

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About GoldenLion

GoldenLion started its journey in 2010 with a goal to help small and mid-sized organizations multiply their sales revenue by putting in place structured sales processes combined with deployment of world-class sales tools.

With this goal in mind, GoldenLion became an Alliance Partner of Zoho Corporation in 2011 in order to deploy Zoho suite of on-demand productivity and collaboration applications amongst these organizations. Over the years GoldenLion has emerged as one of the top consulting partners of Zoho worldwide.

For more information about GoldenLion, please visit www.glionconsulting.com.

