



GoldenLion Implements Law Firm CRM for AndersonDodson, P.C.

COMPANY PROFILE

AndersonDodson, P.C. is a law firm specialising in recovering wages for unpaid and underpaid employees. Being one of the most innovative workers' rights law firms in New York, AndersonDodson has an ever-growing clientele. With increased number of clients who sought help on different issues, it became increasingly difficult for the firm to keep track of all the cases and follow up appropriately.



PROBLEM AREAS

As the firm grew in size, Firm Owner Penn Dodson started looking for a CRM solution to manage their clients' details as well as client intake process. So, they purchased award winning Zoho CRM.

Problem Areas

- ❖ Setting up ZOHO CRM
- ❖ Customizing ZOHO CRM to address the unique needs of AndersonDodson, P.C.

But, once purchased, Penn was stumbling around the software and had little idea on how to leverage Zoho CRM to its full potential for her business

So, she got in touch with GoldenLion, a Zoho Premium Partner.

"We needed a robust CRM solution for our firm. Every single day we are meeting new prospects who trust us with their problems. Keeping their details well documented is of crucial importance

to us. So, we went for Zoho. However, I wanted to get the maximum out of the software and wanted to customise it for the unique requirements of our business. Here, we faced a challenge; we had neither the required expertise nor adequate time to tailor the application successfully.", said Penn.

Thus, Penn found out about GoldenLion from Zoho's website and contacted them for customising and setting up their CRM.

GOLDENLION OFFERS CUSTOMISED CRM SOLUTIONS TO ADDRESS THE PROBLEM AREAS

The expert Zoho consultants from GoldenLion ended up not only setting up Zoho CRM for AndersonDodson but also customised it to address the unique needs of the firm. Once Zoho CRM was in its place, GoldenLion also offered Zoho campaign solutions which let them automatize all their drip campaigns. The complete synchronization of Zoho CRM and campaign not only ensured smooth transition of leads to clients, but also

Solutions Offered:

- ❖ GoldenLion customized ZOHO CRM and set it up for AndersonDodson.
- ❖ GoldenLion also set up ZOHO Campaigns and integrated the same with ZOHO CRM for automated e-mail campaigns.
- ❖ The company customized the "Contact Us" form on AndersonDodson website and integrated the same with ZOHO CRM. Thanks to this, AndersonDodson now receives all their leads, queries etc. direct on their CRM.

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.

Another area where AndersonDodson needed a helping hand was their "Contact Us" form. While their website previously had a basic web form on which visitors can leave their contact details and request a callback, there was no way to segregate the visitors into categories such as leads, general queries, press etc. GoldenLion further customised the web forms to incorporate more fields where the visitors can state their intent. This data now goes straight to the CRM, segregated into various categories on real time basis; so that,

contacting the person and following up becomes super simple.

"My firm uses Zoho CRM every day. When a new potential client contacts us through the web form, the details get automatically saved in the CRM, and from there we can convert the lead into customer, set follow up tasks, schedule meetings and much more. With the help of the customised CRM and web form, we can now keep track of, and follow up with everyone who reaches out to us, so that nobody falls through the cracks.", Penn Anderson, Attorney, Firm Owner, AndersonDodson.



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.

