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INTEGRATED PAYMENT SYSTEMS LTD - IPSL CASE STUDY

BRIEF DESCRIPTION

How IPSL used Zoho CRM and Desk to resolve and generate reports on issues raised and onboarding new clients.

OVERVIEW

Previously, the organization encountered difficulties in generating comprehensive reports and fostering collaboration across social platforms.

Harnessing Zoho Desk has been pivotal in facilitating a fluid communication channel, establishing a discernible trail of requests, particularly from major clients such as banks.

Key Takeaway:

Optimization of Zoho CRM and Desk to be able to maximize service delivery to their clients and keep track of their contacts.

EXECUTIVE SUMMARY

IPSL is located in Nairobi, Kenya at International Life House on 7th Floor.

It is a fintech company whose primary objective is to tackle the issue of inter-bank money transfers in the nation. IPSL offers a secure and instant money transfer infrastructure, known by the brand name PesaLink.

They do bank to bank i.e peer to peer as well as support services. They facilitate government payments using E-Citizen platform.

“Zoho has so many features compared to what we have.”

PROBLEM STATEMENT AND KEY CHALLENGES

The key challenges they had with their previous system was:

- **Report Generation:** They were not able to generate data or have an overview of their performance as a business in terms of turnaround times.
- **Collaboration:** Their system had no option of connecting within their social media accounts, hence, a communication breakdown leading to complaints and customer dissatisfaction.
- **Integration of Apps:** The ability of the system to be in unison and have the same output depending on what their clients needed was an important factor.

By not having a system in place, the company made a loss of 20% in the financial year 2021-2022 hence opting for Zoho.

“We were unable to have conversation with banks, leaving us with no trail for follow ups.”

EVALUATION OF THE PROBLEM

- Ticketing: Instant feedback to the agents was an important factor in solving client issues hence their clients were not satisfied. From this, we were able to identify the need for a system that could offer pop up notification and instant feedback.
- Socials: Their previous system was not able to connect with their social media channels hence, our experts saw the need for a system that can be integrated with their socials. .
- Accountability: They were not able to tell who had received a ticket and how long it took them to resolve the issue and needed allocation of tickets to the respective personnel .
- FAQs: They wanted a solution that would help solve common questions that would not need an agent's attention.

PROPOSED SOLUTIONS

Zoho Desk:

- **Ticketing**; Through tickets, issues would be organized based on time due and priority. The agents, able to resolve them (issues) efficiently and effectively.
- **Socials**: Through IM, all messages from the connected social media accounts are channeled on one dashboard.
- **Reports and analytics**: Built in dashboards, would help them get detailed reports to track and improve their services, whilst, tracking their team's performance.

The company has been able to increase its profitability by 10% since the implementation of Zoho by solving customer problems.

Zoho CRM;

- **Lead Management:** through leads, they would be able to track where their clients came from and who generated the lead .
- **Transparency:** through the accounts' module, they are able to have an overview of all the contact persons for different accounts.
- Document Management: clients needed to fill and provide documents during the onboarding process through the documents module, internal staff can retrieve the documents with ease.

IMPLEMENTATION

Implementation of Zoho CRM and Desk, has taken 6 months.

Bottlenecks: Adaptability of the system by the users, posed as a challenge hence often trainings happened during deployment of systems.

Unique challenges with different platforms, required our resources to reach out to Zoho with preferred solutions.

Customization of Zoho CRM and Desk to the client's preference through integration with their current system.

With IPSL opting for Zoho, it has brought forth a 45% increase in solving customer queries.

RESULT

The ability of Zoho CRM and Desk to be accessible from anywhere whether remote or onsite, makes it a convenient choice to IPSL.

“Zoho has simplified my work especially the ease of collecting documents from clients, it is a one stop shop



...the home of



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