

# Zoko Transforms its Business Processes and Sees Significant Rise in Sales with AllCloud's Guidance



## About Zoko

Zoko Enterprises is Israel's leading and most influential group in importing, marketing and selling of equipment, spare parts, and project development, providing advanced services in the fields of infrastructure, transportation, energy, water, industry and automotive. The company is the official reseller of Caterpillar in Israel.

*"Before AllCloud, we were entirely Sales-focused. Today, most of our resources focus on creating qualified leads and nurturing the right people to sell to."*

## Summary

Before implementing Salesforce with AllCloud, Zoko was focused on sales alone. The company had serious gaps, it was missing essential customer data, had no marketing tools, zero management at the client level, and very few ways to engage with the customer and build a relationship.

AllCloud supported Zoko in onboarding a CRM for the first time, creating a department responsible for leads-funnel, customer engagement and more. Within 8 months, Zoko had 200 Salesforce users, a standardized process for data-driven decision making, and the potential for innovative cloud-based feature development in the future. The company has seen the effect of marketing and improved processes directly on their own bottom line.

## The main challenge: A traditional company, Zoko was almost entirely focused on sales

Zoko knew that the business needed to resolve a few key issues to achieve their strategic goals:

- **A lack of data.** The company was missing important customer information and had no technical tools to manage client data.
- **No management at the client level.** Zoko was unable to scale with the customers or follow up with them, making the whole customer journey about the point of sale only.
- **Zero marketing tools.** Zoko had little concept of leads-funnel, and no marketing department to grow new leads and opportunities.
- **Insufficient engagement with the customer.** Without customer success or engagement processes, there was no way to track if a customer was satisfied or how a relationship had progressed.

*"We didn't know what our problem was, but we knew things weren't working well. We didn't even know what a CRM was, but we knew we needed something."*

## CRM Implementation Was a Process: Starting Fresh, Zoko Sought out Expert Guidance

Zoko began to analyze potential solutions, and chose Salesforce as the best CRM tool that could handle these problems head-on.

However, this was all uncharted territory, and the company knew it needed some support in understanding the technology and implementing it for success across the business. Zoko turned to AllCloud because of its reputation and experience, and recommendations from other businesses who had revolutionized their processes using AllCloud's guidance and support.

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### It Started with a Shift in Mindset

#### The first step was understanding the business

Before Zoko could implement any new tools or see any benefits, the company needed to understand its own goals for using a CRM, and the processes that would need to be changed in order to see the most amount of value. The goal was to create new processes that were built from scratch to get the most out of Salesforce, rather than attempting to force a CRM on top of processes that weren't working.

#### Dedicated support to onboard the new CRM users

During the first month, AllCloud sat closely with Zoko to put together and train a whole department to support the new use of Salesforce. Using the specific business flow created from initial meetings and discussions, AllCloud could identify the tools and processes which would help Zoko achieve their goals in the simplest and most flexible way.

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### Game-changing Benefits

#### For the first time, Zoko had a leads-funnel

Zoko now uses Sales Cloud, Service Cloud, and has integrated a CPQ solution to support the business in creating price quotes. For the first time, Zoko has a leads-funnel team, populating and nurturing leads, that can utilize campaigns, customer surveys, and complex processes/approval. Case management and Asset management tools have changed the way that Zoko handles customer care, including digital engagement tools such as Live Chat directly from their website.

#### Internal gains

The implementation took 8 months, and Zoko now has 200 Salesforce users. With the new approach to data established in the company, Zoko has the ability to also use Custom HR tools, including rewards schemes, evaluations, and streamlining the handling of different request types such as loans or vacations.

#### A 360-degree view of the customer

Sales Cloud interfaces with legacy systems and technology, creating a single pane of glass approach to data within the company. While beforehand, the customer used multiple interfaces which increased complexity, there is now one clear view for all users of complete communication.

#### Dedicated support and guidance

*"We really feel like we have the dedicated support we need. It feels more personal than having a company that works for us. I have one point of contact that takes care of everything I need, responsible for every step of the process."*

## Results

- **An entirely new customer-led focus:** Zoko has a customer success department, a marketing department based on digital engagement, and a leads-funnel for the first time.
- **An organized process:** Whereas once every team member might have had their own way of doing things, now everything has a standardized process. From Finance and IT to Sales, Salesforce is being implemented across the board.
- **Rise in sales:** By focusing on leads and marketing, and improving work processes and flow, Zoko has seen a measurable difference in their bottom line.
- **A new business language:** Customer experience, leads, funnel, opportunities. These are all examples of the new lingo that Zoko uses day to day, shifting the focus from traditional business to cutting-edge marketing and sales.
- **The potential for new feature development:** The business can quickly launch new tools and features. The pipeline for Zoko includes Marketing Cloud, Field Service Lightning, a Field Service Management tool that can track field orders, manage SLA and more.
- **Data-driven decision making:** This transformation has improved managerial skills, analysis, and decision-making among executives, based on actionable and accurate system data.

