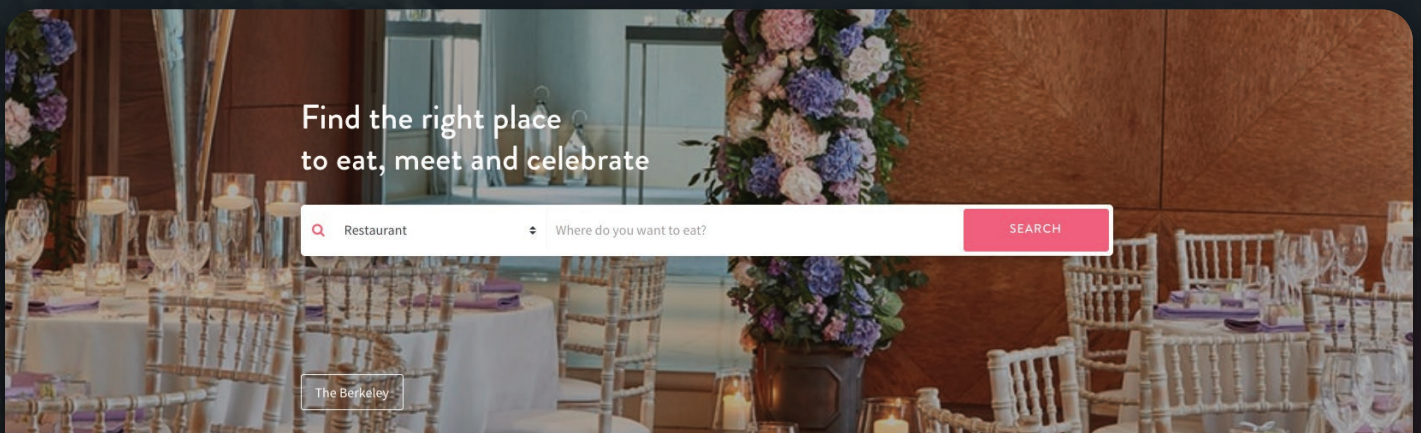


IN A NUTSHELL

A restaurant listing company deployed Zoho CRM to replace Microsoft Excel spreadsheets, Microsoft Access databases and its on-premise CRM software to address the challenges faced with their growing business. The company found that the transition to a new solution improved process efficiency, saved hours spent on manual work, and increased overall visibility.



In the spotlight



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FITZROVIA
YOPO at the Mandrake



KNIGHTSBRIDGE
The Berkeley



LONDON BRIDGE
Shangri-La Hotel, At The Shard, London

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I THE COMPANY

SquareMeal (squaremeal.co.uk) has been a market-leading restaurant guide in the UK for nearly 30 years. SquareMeal is privately owned with its main office in London and a workforce of about 30 employees. They have listings of over 15,000 restaurants and bars with up-to-date reviews from tens of thousands of customers. They also offer a concierge service that provides an event organiser a recommended list of venues and event spaces that would be appropriate for their upcoming event. The SquareMeal team is committed to offering a curated guide to quality eating and event spaces with a combination of expert recommendations and customer reviews.

I THE CHALLENGE

SquareMeal has been using Zoho CRM since early 2019. Like many other growing businesses, SquareMeal had inefficient legacy applications and systems in place that could not support its continued growth. The company used Microsoft Access and Excel spreadsheets in addition to SAGE CRM. Company agents maintained sales engagements in Sage CRM and created sales orders in Microsoft Excel and then manually copied them into Microsoft Access for report generation. This was time-consuming, inefficient and limited the data reporting and crucially the sharing of this information. All of this made it difficult for managers to get a complete view of their clients and the different interactions they had with them.

The company needed a solution with the following capabilities:

- 01 **Data centralisation and process workflow alignment to manage the restaurant listings and concierge sales**
- 02 **Cloud computing and integration capability with modern applications**
- 03 **Data management and reporting functions for improved visibility of the sales process and customer engagement**
- 04 **A user-friendly system for easy adoption by the sales team all in one application.**

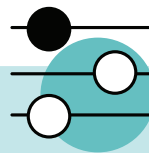
THE PLAN

The company needed a full-scale update to the legacy system. After defining their business goals, it became evident that a shift to a cloud-based solution would be feasible and valuable to long-term growth. During the evaluation process, SquareMeal considered Salesforce, Microsoft Dynamics 365, Insightly, Freshsales, HubSpot and Zoho CRM. Ultimately, the company chose Zoho CRM for its ease-of-use, easy customisation, and cost-effectiveness.



Usability

The biggest challenge in getting the sales team on board with the legacy system was their unresponsiveness to the system. SquareMeal needed a solution that didn't require a lot of training and was easy to understand for their sales reps. Management found Zoho CRM to be intuitive and easy to use, and their sales team was more responsive to the new solution.



Customisation

Of the vendors considered, SquareMeal found Zoho CRM to be the easiest to customise for their business. In comparison to Salesforce and Microsoft Dynamics 365, Zoho CRM offered similar functionalities with better customisation options. The company was successful in aligning the solution to their specific business model.



Cost-effectiveness

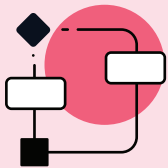
Zoho CRM was inexpensive when compared to the other vendors considered. Additionally, the company also saved on legacy software and applications. Zoho's affordable pricing has enabled SquareMeal to provide its sales department with individual licenses, bringing teams closer with shared benefits across the organisation.



The implementation was managed by Simon White, a co-founder at SquareMeal. Simon says **"Zoho's implementation support was remarkable. The software required minimum support due to its simplicity and easy customisation."**

I KEY BENEFIT AREAS

Implementing Zoho CRM enabled the company to replace its on-premise software with a cloud-based CRM solution that met its growing business needs. Zoho CRM has simple, consolidated data representation that improves account and contact management. Key benefits include:



Increased Process Efficiency

The aggregated data and the ease with which the sales team could update and manage a lead profile improved sales process efficiency by 400%. As the process became more efficient data collection increased by 300%.



Better Reporting

A 360° view of customer data enabled the company to better analyse their customer engagement. The company observed that since the implementation of Zoho CRM, creating and managing accounts and reports that took hours on Access and Excel has become faster and more efficient. In addition this reporting can be shared across the company.



Time-Saving

By centralising all data on Zoho CRM, SquareMeal reduced data entry duplications from spreadsheets to Access. Additionally, time spent on searching for accounts and creating analytical reports was reduced considerably. These improvements allowed each of the 15 users to save 5 hours per week on average. In addition their external accounts function saves time as they access Zoho reports and bill from that list.



KEY COST AREAS

Apart from the licence costs, the major cost to SquareMeal was the co-founder's time spent on Zoho CRM implementation. The easy of customisation and help from the Zoho on-boarding team meant that the co-founder could design and build the system and migrate with the no external agency

LEARNINGS

This deployment demonstrates the benefits of a unified, cloud-based platform to a mid-sized organization such as SquareMeal. It gives decision makers a comprehensive view of customer engagement and greater visibility of everyday sales activities.

Due to Zoho CRM's easy customisation and simple UI, the company was able to make the shift from their legacy software without any hassle. With Zoho's support, data migration from SAGE CRM to Zoho CRM was made easy. Centralized data and workflow alignment allowed the efficient management of contacts and accounts.

Subsequently SquareMeal has implemented Zoho SalesIQ to make use of the Chat function integration with Zoho CRM for their Concierge offering.