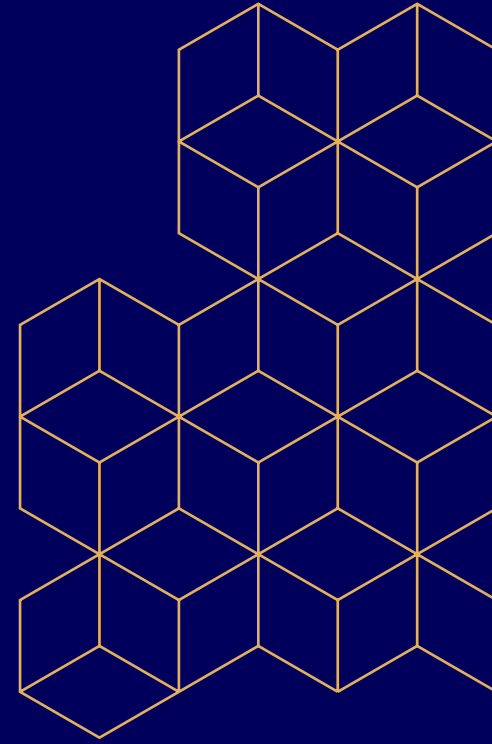**Strata**

cuts down ticket resolution time by 50% using Zoho Desk

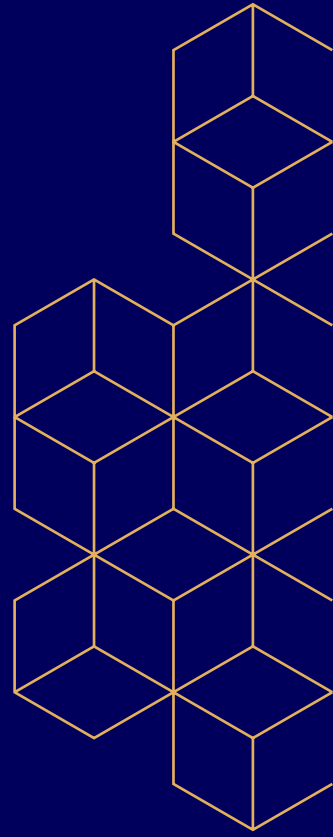**Strata**
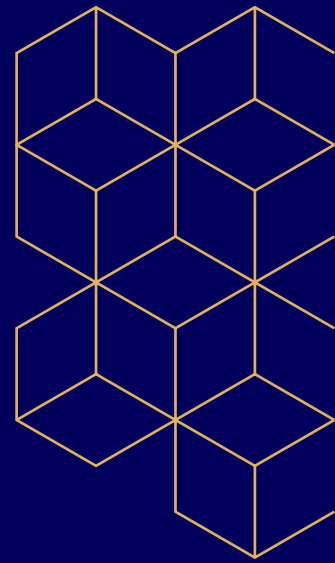
Strata

Overview

Strata leverages both Zoho Desk and CRM extensively to automate business processes and maximize employee efficiency.
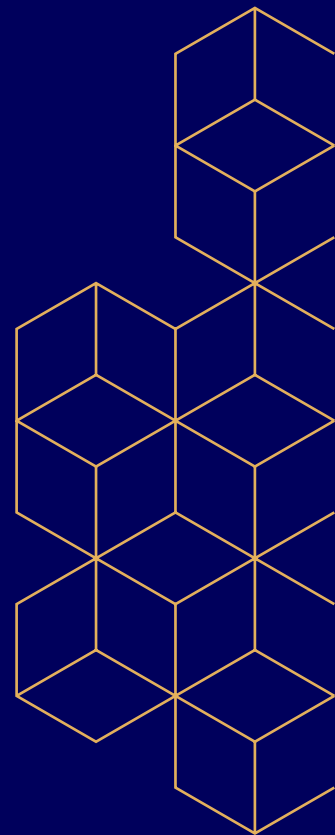
Zoho Desk

Strata

The company

Strata is a commercial real estate investment company that provides lucrative assets for their clients. Aiming to create a transparent and paperless ecosystem for real estate investors, they embrace data-driven technology to create more successful investment strategies. In 2019, the founders came up with the idea of fractional ownership to democratize the commercial real estate sector and provide more value for investors.

Zoho Desk

Strata

The challenge

Strata's customer success team began with only two members. Initially, all questions and requests were routed to them through the investment managers. The process became more challenging as the company began to scale up. The team grew, and they needed a more disciplined approach to organizing and responding to queries. They also wanted to focus on enhancing their customer experience.

The team tried several different approaches, but it remained a challenge to consistently monitor and accurately tag the emails flowing in. Initially, they started using the personal email inbox but the process became a hassle, making it more challenging for the team. Management was concerned about keeping track of the requests coming in and the potential for errors caused by tracking metrics manually.

Zoho Desk

Strata

The solution

Since Strata was already using Zoho CRM, the team was interested in exploring Zoho Desk. They also evaluated Zendesk before making a decision. The team ultimately chose Zoho Desk due to its integration capabilities.

"The integration seemed much easier in terms of just understanding who the customer is since most of our data was already there in CRM," said Gerald Julius Noronha, senior manager, client success at Strata.

Zoho Desk
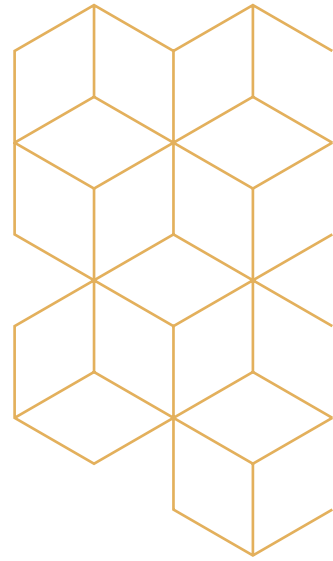
Webforms

With Zoho Webform, there is a convenient way for Strata's customers to swiftly raise any questions or concerns. Instead of navigating to their inbox and drafting a complete email, they can easily create a ticket with just a click of a button directly from the website. This enables them to input all the necessary information, and the request is then sent to the team for a prompt response and resolution.

Custom functions

Keyword-based classification: Strata created keyword-based classification for their ticket management process. This customization ensures that relevant team members are automatically assigned tickets based on the keywords, eliminating the need for constant manual monitoring of the queue. This enhancement has significantly streamlined Strata's workflows.

Status column customization: The customer success team created the "on hold" column to learn where the tickets are on hold, whether the ticket is with the tech team, legal team, finance team, or other internal teams. This customization enables the management team to communicate effectively and understand the status of tickets that are awaiting action from specific teams.

This information is also a valuable source of data-backed insights that have proven immensely helpful in measuring ticket resolution times and related metrics to ensure effective oversight of Strata's teams. With visibility into the company's workflows, management can identify issues and provide targeted support to improve service levels for clients.

Service-level agreements (SLAs)

Zoho Desk's SLA rules and automation help Strata meet its customer service commitments. If a ticket remains unassigned for two hours, it triggers an SLA workflow. If a ticket is not addressed within eight business hours, it automatically escalates to priority level one, alerting the manager and thus, ensuring a timely response and resolution process.

Dashboards

The team uses a general dashboard to check key metrics like first response time and resolution time per user. They've also created specialized dashboards to understand how long it takes for different teams to handle tickets and examine tickets with different classifications and sub-statuses. They review these relevant statuses mostly on a weekly and monthly basis, enabling them to monitor trends and enhance their ticket management processes.

Integration With Zoho CRM and third-party apps

Strata has integrated Zoho Desk with Zoho CRM to retrieve a customer's information from CRM whenever they raise a ticket within Zoho Desk. Strata has also integrated Zoho Desk with Gupshup, a conversational chatbot application, and WhatsApp to communicate effectively with their prospects and customers.

Strata

Benefits & ROI
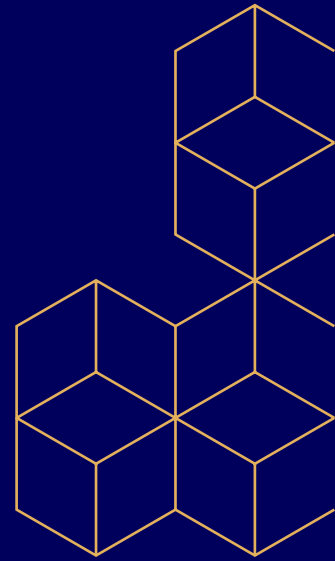
Zoho Desk adoption rate

The Strata team found Zoho Desk straightforward and effective, enabling them to provide prompt support to clients. They tailored their training so it would take a maximum of one week for new users to get accustomed to the platform.

Reduced resolution time

Using Zoho Desk, Strata has managed to reduce its average ticket resolution time by around 50%. Previously, the team could handle 50–100 tickets in eight hours. Now, they can accomplish the same workload within three to four hours.

Zoho **Desk**

Strata

"

In comparison to our previous shared inbox system, where handling 50 tickets posed a risk of oversight, **Zoho Desk has drastically reduced our resolution time by 50%**. What used to take six hours can now be achieved in just three to four hours. The effectiveness and speed of our ticket resolution have significantly improved, putting us in a much better position. Zoho Desk has proven instrumental in streamlining our processes and enhancing overall productivity."
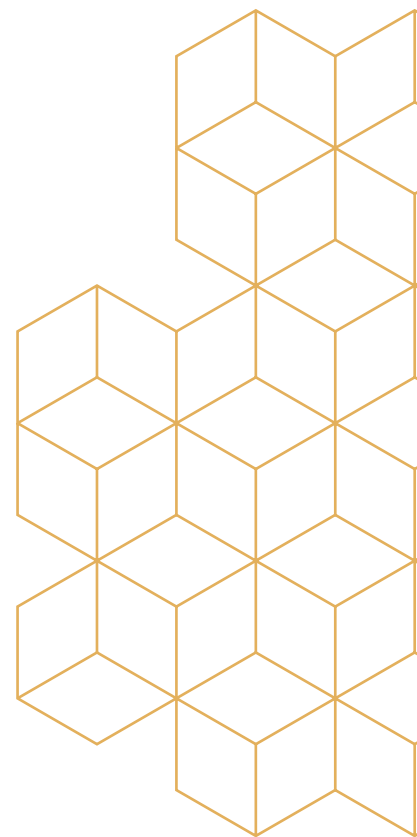
Gerald Julius Noronha,
Senior Manager, Client Success, Strata
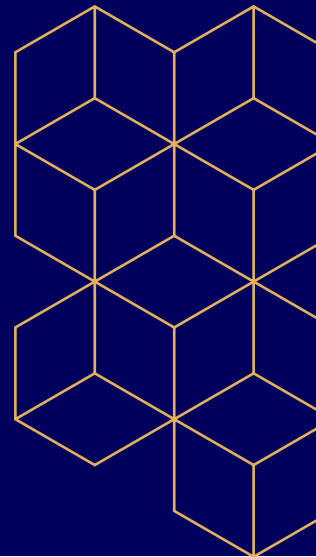
Zoho Desk

Accuracy in metrics

Using Zoho Desk, Strata can accurately track the performance metrics they need to monitor. The management team can apply real-time information to make informed decisions and craft data-based strategies.

Looking forward

Strata is already using multiple Zoho products and looking forward to exploring more applications that will help them create a unified and well-integrated business ecosystem.

Strata

Zoho
Desk