

## **Case Study: Product data entry**

### **Challenge:**

Company was approached by a client seeking assistance in creating a robust account database within their CRM portal. The client required a systematic approach to gather relevant customer data and input it into their CRM system accurately and promptly. The challenge lay in optimizing this process to ensure swift account setup while maintaining data integrity and customer satisfaction.

### **Solution:**

Company devised a multifaceted solution to address the client's requirements comprehensively. Firstly, they initiated communication with customers via email, requesting all necessary details to set up their accounts in the CRM. This proactive approach not only streamlined data collection but also encouraged customer engagement from the outset.

Upon receiving the requisite information from customers, Company dedicated team swiftly entered the data into the client's CRM portal, ensuring accuracy and completeness. Simultaneously, they shared the updated information with both the client and the respective customers, fostering transparency and collaboration throughout the process.

Furthermore, recognizing the importance of empowering customers to manage their accounts independently, the Company provided tailored training sessions. These sessions equipped direct customers of the client with the necessary skills to navigate and optimize their accounts via the customer version of the CRM platform, thereby enhancing workflow efficiency and user satisfaction.

To expedite the process and meet the client's timeline requirements, the Company strategically allocated additional manpower. By leveraging a larger workforce, they ensured faster processing of account setups without compromising on quality or attention to detail.

### **Result:**

The implementation of the Company solution yielded significant results, surpassing the

client's expectations. Over the course of the project, more than 100 customer accounts were successfully set up within the CRM portal. Notably, feedback from customers indicated a high level of satisfaction with the account setup process, citing its efficiency and transparency.