



Pre Sales Post Sales Performance Report

Case Study





Company Overview

Company is a IBAn and payment gateway solution company based in UK. They Provide solution to high risk business

Challenges and Objectives

Challenges

- lack of visibility
- Manual Data analysis
- Data Silos

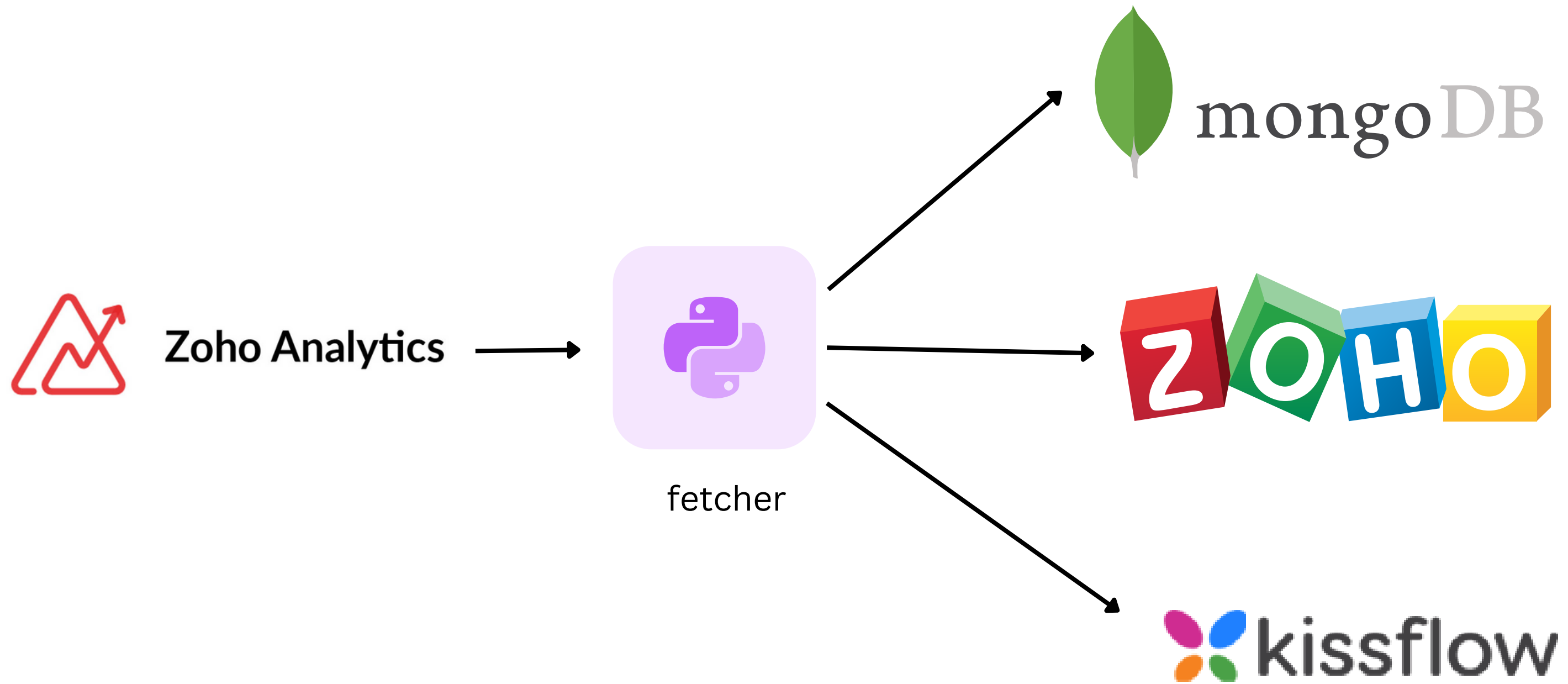
Objectives

- Unified Data reporting
- Easy KPI monitoring
- Automatic Data refresh and updates

Proposed Solution

- **Data Integration:** Zolute integrated data from various sources, including Kissflow, MongoDB, and ZOHO apps, to create a centralized data repository.
- **Customized Dashboards:** ZOHO Analytics was configured to develop interactive and customizable dashboards that provided real-time insights into the pre-sales and post-sales teams' performance metrics.
- **KPIs Definition:** Zolute collaborated with FincoTech to identify and define key performance indicators (KPIs) to be tracked for each team.
- **Automated Data Refresh:** Regular data refresh schedules were established to ensure that the reports and dashboards remained up-to-date.

System Design



Marketing Reports

Dashboard

Filters

Trading Period:

--- Select ---

Quarters:

--- Select ---

Months:

--- Select ---

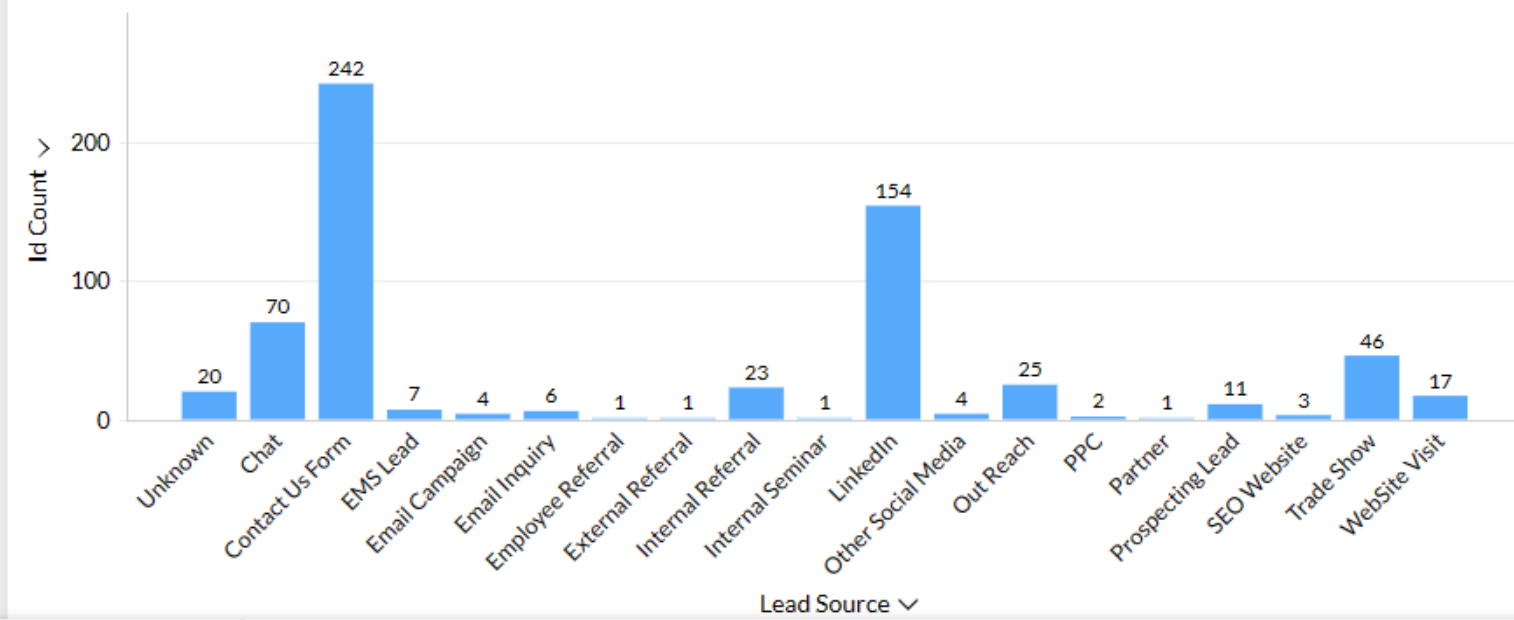
Weeks:

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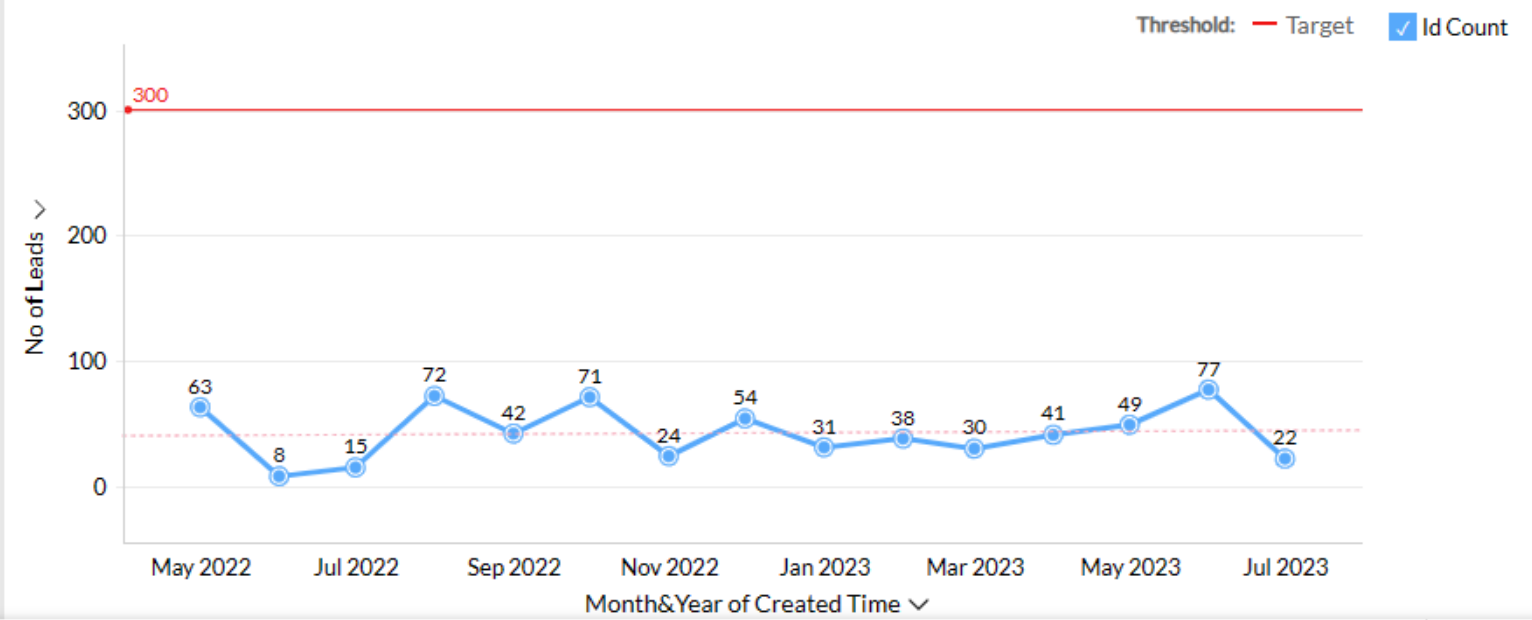
Leads Lost This Month

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MKT001 - Leads by source

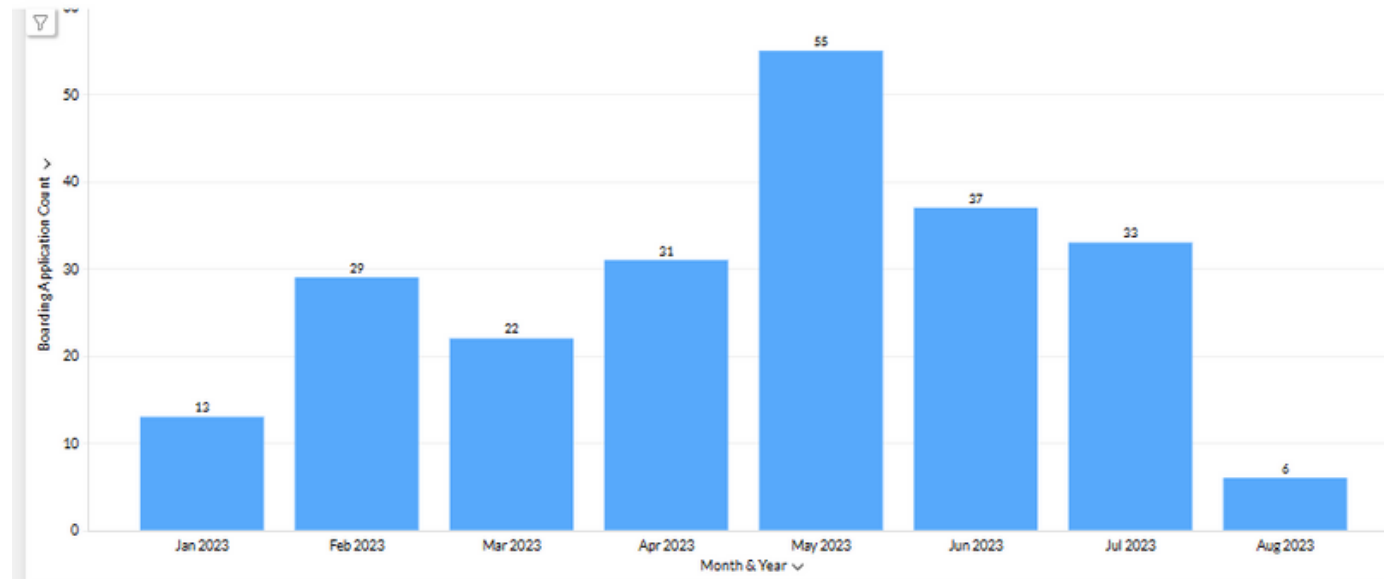


MKT002 - Unqualified Leads

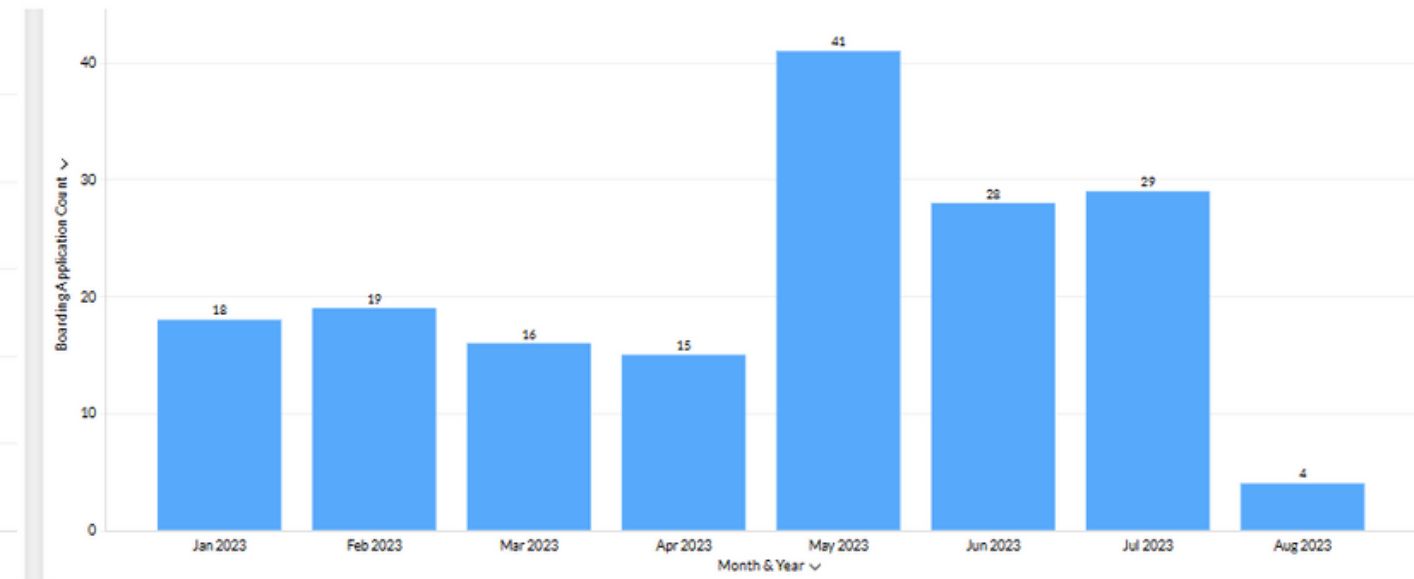


Post Sales Reports

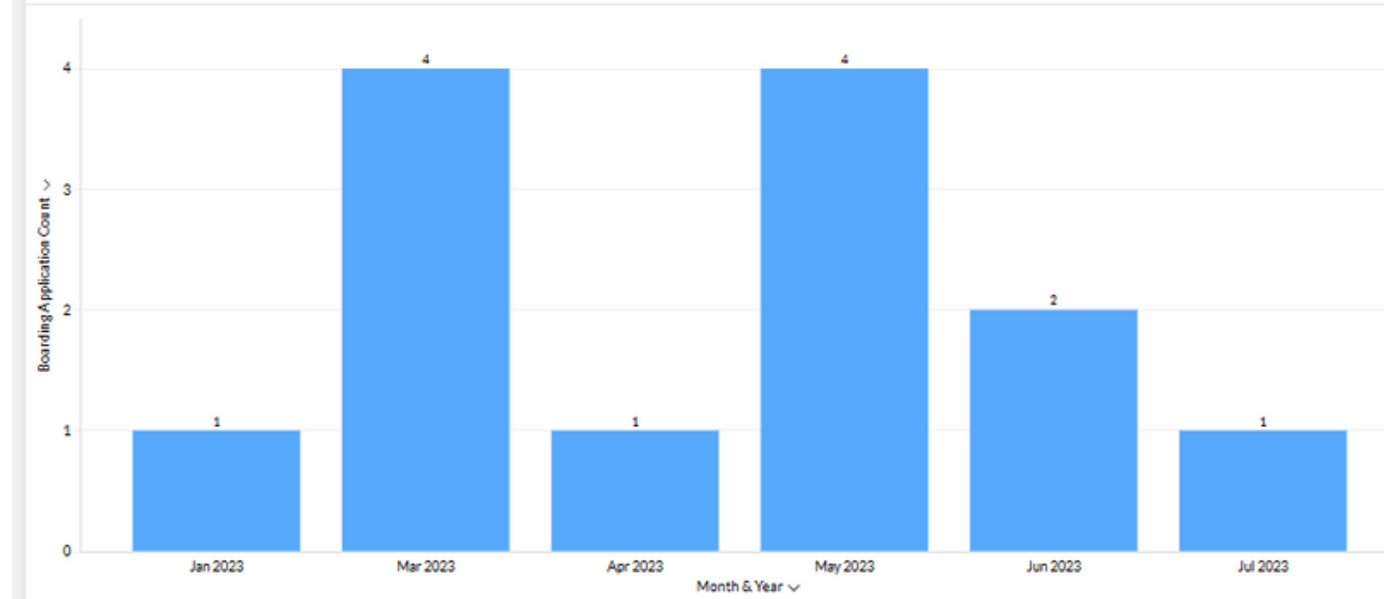
Boarding Dashboard ☆ ○ 📄 ⋮



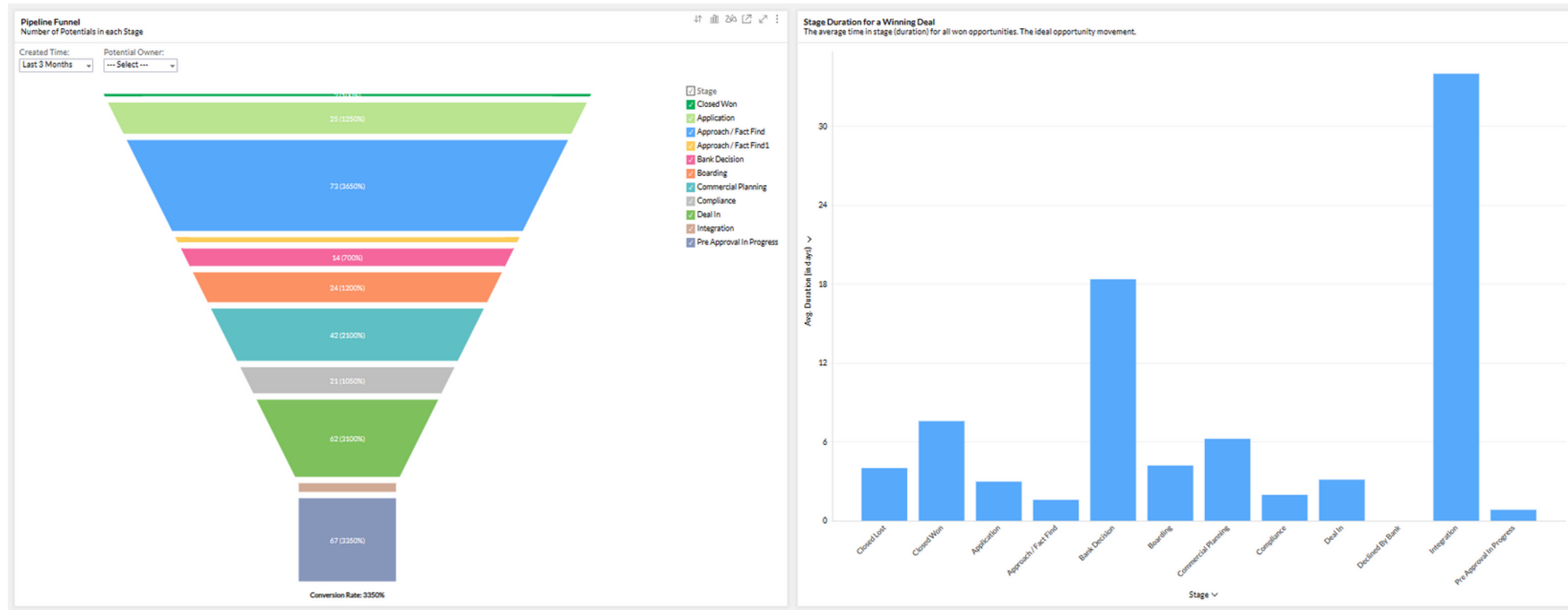
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Reject at Boarding



Sales report II





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Authorized
Partner



SCAN TO SCHEDULE A MEETING