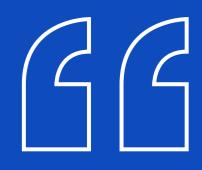# ZOHO Creator

## The Sales Collaborative

# How TSC drives sustainable sales performance management with custom solutions from Zoho Creator

"Most sales businesses do not need a full 'out-of-the-box' sales CRM product. Low-code development allows us to develop a CRM specific to your business requirements and implement it in weeks. And then grow the application, or add functionality on the fly when your business needs it. You will see a much better adoption rate and use of the system when it's simple and built for your business."

**Errol Van Der Merwe,**
Sales Director

A sales management consulting firm sees increased productivity and revenue after turning to Zoho Creator to build custom apps for their unique clients across various industries.

**The Sales Collaborative**

# The company

Sales is an important aspect of any business. However, businesses often fall short in identifying market needs and reaching the right customer base. To bridge these gaps for businesses, Errol Van Der Merwe, Manus Mentz, and Daleen Pretorius combined their 60+ years of business consulting experience and founded The Sales Collaborative in 2020.

Their vision was to empower businesses around the world with an effective and robust sales management system. The Sales Collaborative (TSC) initially focused on emerging companies in South Africa that struggled with the sales aspect of their businesses. Currently, they cater to big and small clients alike in the US, and South Africa.

Recently, we had the opportunity to speak with Manus Mentz, Business Systems Director at TSC, who handles the development of sales management systems and trains sales representatives for client organizations. He explained how TSC uses Zoho Creator to build custom applications, which is at the core of system development.

# How TSC operates

One of the directors interacts with the decision maker of a business (the client organization) for business consulting. The demands of an audience differ with the industry, and a generic sales model typically fails to align with those needs. TSC proceeds with sales consulting if there is scope for a huge improvement in sales. It is generally a six to twelve month project, sometimes longer, based on the client's requirements.

Manus Mentz handles most aspects of the project post-confirmation. The typical project cycle starts with building a customer relationship management (CRM) application using Zoho Creator and integrating it with Zoho Analytics. The application is ready to use within one to three weeks.

The TSC team then trains the sales manager to use the application and manage the sales representatives effectively. Since it is relatively easy to create and use Zoho Creator applications, the TSC team can focus on other tasks now. In the absence of a sales manager, the company outsources someone from TSC

for the role to keep things moving efficiently. The sales representatives are trained and guided until the company appoints a sales manager. For a period of 12 months, all the services requested by the client are provided for a management or consulting fee. After 12 months, the Zoho Creator licenses for the application are transferred to the client.

The process is done to help the client run a more productive and efficient business. "In all our projects, I like to believe we make a positive impact because we end up making them a much better sales engine that runs like a diesel-powered engine," Mentz said.

# The challenge

TSC had a clientele that included businesses across various industries. Sales cycles, turnaround time, and even sales challenges vary greatly from one business to the next. Some major problems their clients faced were:

- **Reduced efficiency in closing sales**

- **Erroneous data capture**

- **Longer turnaround time**

Like most organizations, the sales representatives at the clients' organizations mainly relied on spreadsheets to store and retrieve data for the various stages of the sales cycle. Once a month, they would transfer all the data from the spreadsheets into a business intelligence tool. The added data was often inaccurate because of the inconsistent and tedious process.

# The solution

In 2018, while working at another organization, Mentz came across Creator upon searching for low-code application development tools. Later in 2020, when he and the other two partners started TSC, using Creator was a no-brainer.

Mentz compared Zoho Creator to Knack but noted the latter lacked the integrations of the former. As Zoho Creator easily integrates with other Zoho products like SalesIQ, Books, Analytics, Projects, and more, Mentz and his team are able to build custom applications for any industry.

In practice, Mentz creates an outline for custom applications based on the customer's requirements. Later, in person or via video call, an application is made based on the customer's inputs by simply dragging and dropping fields. Within a month, the application with dashboards and analytics is ready. "The customer also pitches in after realizing how powerful the platform is and how easy it is to make changes on the fly," Mentz said.

It takes two to three days for the team to ensure the application runs smoothly and the customer portal functionality is active. The customer portal gives the clients access and control over the application to start adding users. The users and clients can start using the application at this stage.

> "
>
> Zoho Creator is quick and easy to build apps on. It's mobile-friendly and all in the cloud. It makes our job really easy when it's time to roll out these systems for our customers.
>
> **Manus Mentz**
> Business Systems Director

# Custom applications built with Zoho Creator

Mentz and his team build custom applications using Zoho Creator based on customer requirements. Below are examples of the apps they have created for some customers.

## Sales management app

This is the most widely used app by TSC's clients. The sales representatives log prospect details along with other important data relevant to sales. The entire database is maintained on the cloud for easy and secure access. Analytics is used on the database to gather insights and to facilitate sales enablement.

## CRM app

This application provides the manager of the business with a detailed overview of all the sales orders currently in pipeline and of the respective sales representatives. Each entry can be analyzed further by the manager to derive better insights of the employees and the customers.

## Desk app

The client in this example struggled with their sales representative assignment process. The receptionist used to take notes on a notepad, and often these notes were misplaced before a sales representative could be assigned. The app helps the receptionist easily assign representatives to the calls based on their availability.

## Security app

Made for a security agency, when there is a security incident and a house alarm goes off; the security agency team is notified. The team can take a photo of the gate upon reaching the location, which is saved along with a timestamp in the app to serve as proof of response time. This feature helps the agency handle things with the customer.

## Meeting app

This is another app that most of TSC's clients find useful. It helps the sales representative record meeting minutes via voice notes after meeting with a prospect instead of typing everything out. They can also upload important details in the form of pictures or text documents.

## Reimbursement app

Representatives can submit expense sheets using a hassle-free process. Pictures of the bills are uploaded on the application to be processed by the manager. There is less paperwork for the representatives and the financial manager.

The Creator had a solution even when it seemed like a client needed something too specific. "Two or three times a customer came up with a unique request—'I need a field like this' or 'a function like this'—but every time I found it was already there," said Mentz.

TSC usually takes a survey after 12 months to understand how the clients have used the applications. This feedback helps them create better client applications by upgrading the existing ones.

# Benefits and ROI

- **Increased productivity and efficiency throughout the entire sales management cycle**

- **Reduced systems and management costs associated with projects**

In the past, TSC's clients shared application specifications based on their system compatibility and requirements. The conventional method would have required programmers and cost a lot of money. Mentz and his team save time using Zoho Creator to build custom applications. Since turning to Zoho Creator, TSC reports increased productivity, as developing applications is easy. The combined benefits of saved time and increased productivity also equated to an increase in revenue.



# Looking forward

> **People don't really see and understand how powerful low-code is. My message to anybody I would recommend [Creator] to is that this is the way of the future**



**Manus Mentz**
Business Systems Director

TSC runs 10 to 20 projects using the customer portal feature at any given time and reaches up to 250 users. They believe Zoho Creator's yearly subscription fee is negligible compared to the consultation fees collected from all the projects. The team plans on expanding their business to other parts of the world with their expertise and the power of Zoho Creator.

# About Us

At Zoho Creator, we've always worked towards a single purpose—empowering users to build functional apps with minimal coding expertise. We've helped **14,000+ brands** create bespoke solutions and improve their end-to-end operations across a variety of industries. With over **16 years of experience** in catering to **B2B and B2C organizations,** we have the best tools in the trade to help you improve your business.

You can get started with Creator by visiting our signup page. You can also check out our prebuilt apps to get started right away.

**ZOHO** Creator

www.zoho.com/creator

# We'd love to talk! Reach out to us

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