

Legal firm boosts lead generation using **Zoho Analytics**



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Zoho Analytics allowed us to automate everything. We save time and manpower, and are able to focus on what is important.

BUSINESS

Zegal is a cloud-based legal tech company that helps users draft legal documents, automate workflows, and get guidance from law firms. With over 20,000 users and lawyers using the solution, it has been featured in Forbes, Huffington Post and VentureBeat.

CHALLENGE

Our data comes from various sources such as Zoho CRM, website engagement, email marketing, sales communications, and custom apps. The challenge was to combine all the data and create a conversion funnel.

Zegal had their data scattered across multiple channels. They had to download data from these sources, combine them into one spreadsheet by manually copying and pasting, and then create reports on top of it. This process was time-consuming and prone to human errors.

SOLUTION

The team decided to try Zoho Analytics and were able to get data not just from Zoho CRM, but from multiple other sources like Adwords and custom apps for cross-functional analysis.

The auto data blending feature enabled us to combine data from Adwords, CRM, and other sources. This helped us find the lead sources and optimize our channels efficiently. Weekly, we save half a day's time which would otherwise be spent collecting and modelling data.

The team created ad hoc reports and shared them with their:

- Sales teams - Reports on deals closed and forecasts for the upcoming months. This helped them track what has been done, what is coming up, and where the team stands.
- Decision makers - With individual breakdown and high level performance metrics.

BENEFITS & RESULTS

- Zegal were able to run powerful lead analytics and optimize their channels.
- Data blending helped Zegal combine data from CRM and Adwords easily.
- 15% time saved weekly using Zoho Analytics.