



x



# Zoho CRM Automation for PR Claims

## Executive Summary

PR Claims is a premier New Zealand consultancy specializing in R&D Tax Credit claims and government grant advisory. They excel at helping businesses navigate complex incentive programs to secure vital funding. Their commitment to maximizing client returns through meticulous processes is the cornerstone of their service.

## Organization

PR Claims

## Mission and Vision



To simplify the process of claiming what businesses are rightfully owed from government R&D and grant schemes. Their vision is to be the most trusted and effective R&D tax credit and grant advisory in New Zealand.

# Case Study

## Challenges



### **Time-Consuming Process**

Staff manually compiled lengthy claim forms by copying data from client accounts in the CRM, a process that took hours.

### **Prone to Errors**

Manual data transfer risked inaccuracies, potentially affecting claim quality.

### **No Automation**

The lack of a link between account records and documentation made it impossible to generate forms quickly or consistently.

### **Operational Bottleneck**

This manual task slowed down service delivery and limited capacity.

# Case Study

## Solution

FAIRCHANCE FOR CRM designed and implemented an elegant automation solution directly within PR Claims' Zoho CRM environment to tackle the core challenge of manual form creation.

### Automated Data Fetching:

Leveraged Zoho CRM's powerful customization and integration capabilities to create a seamless link between the Accounts module and the form generation process.



### Intelligent One-Click Solution

Developed a custom function and placed a dedicated button on the Account page. With a single click, the system automatically fetches all relevant, pre-defined client information.

# Case Study

## Dynamic Form Population

The solution dynamically populates a pre-formatted template with the fetched data, instantly generating a complete and accurate draft form ready for review and finalization.



## Customized Template Design

Ensured the auto-generated form adhered to PR Claims' specific layout and data requirements, maintaining professionalism and consistency across all client documentation.

# Case Study

## Result



**FAIRCHANCE FOR CRM** targeted automation solution fundamentally transformed a key operational workflow for PR Claims. By replacing a tedious, error-prone manual process with a sophisticated one-click automation, we empowered their team to operate with greater efficiency, accuracy, and scalability. This has positioned PR Claims to serve more clients effectively while upholding the highest standards of data integrity.

The implementation yielded significant and measurable results for PR Claims:

- **90% Reduction**

in time spent creating claim forms.



# Case Study

- **Near-elimination**

of data entry errors in documentation.



- **Improved consultant productivity**  
and job satisfaction.



- **Faster client turnaround times**  
and enhanced service quality.





# Case Study

## Applications Implemented

Zoho CRM



# Client Feedback



# Case Study


## About Fairchance for CRM

**FAIRCHANCE FOR CRM** provides round-the-clock services and maintenance to keep your business on the growing and developing track to generate the revenue within the budget. We have expert team to work on the Zoho CRM platform thoroughly with all of automation and innovation. In addition to this, we are able to provide individualized solutions that are adapted to match the particular requirements of each customer, so ensuring the highest possible levels of efficiency and production.

With 700+ customers in 70+ countries, today we are all set to become a trusted growth partner to your business!


For the purpose of assisting businesses in improving their customer relationship management, the **FAIRCHANCE FOR CRM** platform offered solutions that were both individualized and efficient in terms of cost. enterprises are able to obtain significant insights into the behavior and preferences of their customers using the platform's powerful analytics capabilities, which in turn enables the enterprises to modify their marketing tactics in accordance with those preferences. Businesses have the ability to improve customer happiness and loyalty while simultaneously optimizing their use of resources to achieve optimum efficiency when they implement **FAIRCHANCE FOR CRM**

## Contact Us

 Madina Tower, Muslim Town Morr, Ferozpur Road, Lahore, Punjab, 54000

 Fairchance for CRM

 fairchance@fairchanceforcrm.com

 +92-304-4384009

 Fairchance786

