

Kings Secure Technologies

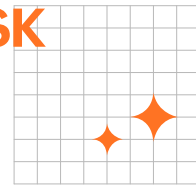
# Revitalising sales meetings with dynamic reports





# The Company

**SECURITY, FIRE SAFETY AND RISK  
MANAGEMENT SOLUTIONS**



Founded in 1971, the Kings Secure Technologies (KST) group of companies is a specialist integrator of security, fire and life safety systems. With a number of strategic acquisitions driving impressive growth since 2020, the business is forecasting a £60 million turnover in 2024, has 8 offices around the UK, a footprint in over 20 countries, and boasts an 800-strong workforce. KST serves a broad spectrum of B2B industries from retail to defence, warehousing, manufacturing, and commercial finance.

We caught up with Jo Goulden, Head of Marketing at KST, to understand how this burgeoning business turned to Zoho when it needed to standardise its pipelines, gain visibility of its vital stats and shake up its stale sales meetings.

# The Challenge

## View a complete pipeline of the KST group of companies in one CRM system



**Each division kept their own records.**

There was just no way of knowing exactly what opportunities we had in the pipeline.

**Jo Goulden**

Head of Marketing



Kings Security Systems has been the business's main security arm since its inception. It provides CCTV monitoring, manned guarding, fog systems, intercoms and intruder and access control. In 2020, the acquisition of Silver Group added Automatic Opening Vent (AOV) systems to the group's portfolio, followed in 2021 by the acquisition of Cougar Monitoring, which offers key holding and emergency response services. E-FIRE, the latest string to KST's bow, brought fire safety systems, fire door inspections, risk assessments, and reporting to the group's capabilities in 2023.

Against this backdrop of growth, KST's administrative software was not keeping pace. Without a CRM system, it was impossible to standardise, visualise, or report on the data from each entity or the business as a whole. With the group's CEO Bob Forsyth feeling frustrated, Jo was tasked in 2021 with implementing an all-encompassing CRM, capable of housing and knitting together each division's data.

The new CRM would also need to be tightly linked with KST's existing field service management (FSM) software, which it uses to schedule security installations and service visits, as well as "DYMENSiON", KST's in-house quoting software. "We needed an API integration... so that our salespeople didn't have to do double entry, and to keep things accurate," says Jo.

By bringing together the data from each acquired business, its FSM and its quoting platform, KST hoped to improve its internal reporting and unlock a wealth of insights and opportunities for the group. "One of the things that we hoped to achieve from the outset of this project was to get a full view of the complete pipeline of the KST group of companies, including all our acquisitions... We needed to bring all business units together and streamline our processes," reveals Jo.



Another concern that Jo was keen to address was KST's laborious weekly sales meetings. Each salesperson would present a different PowerPoint deck listing their opportunities and won deals, which would take them hours to prepare. "Our sales meetings used to be very tedious. We'd go through each presentation line-by-line," laments Jo. By implementing a CRM system, KST aimed to eliminate the inconsistencies in these sales meetings by using a standardised "opportunities" module, filtered to display each team member's pipeline.

What's more, KST needed the CRM solution to deliver a snapshot of the upcoming installations across each segment of the business, to help them effectively prioritise work. "We decided we also wanted to use the system for opportunity scheduling... to understand what jobs we had at each stage of the pipeline," shares Jo.

# To create a CRM fit for Kings!

- Amalgamate data from multiple companies inside one application.
- Integrate with the FSM and in-house quoting platform, performing daily syncs for real-time insights.
- Deliver extensive reporting capabilities with visual charts, graphs, and widgets.
- Improve KST's dull, disjointed sales meetings using a deals module in Kanban view.
- Assist with effective resource planning through opportunity scheduling capabilities.
- Be intuitive and easy to use, ensuring widespread adoption.
- Offer a cost-effective licensing plan.

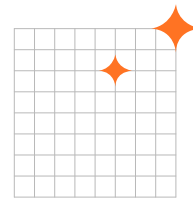
Jo formed and headed up a small task force of colleagues to define the KST group's goals, research viable CRM platforms and carry out rigorous testing. Following a professional recommendation, Jo also enlisted Bill Quinn, the Founder and Owner of 1 Cloud Consultants - an official Zoho partner - to help guide the team to success. On Bill's advice, Jo was nominated as the business's "CRM Champion" to act as a gatekeeper for the chosen platform's data sanctity, process mapping, training, and development.

# The Solution

## Zoho CRM delivers a 360° pipeline view, illuminated by Zoho Analytics



We chose Zoho based on its ease of use and **value for money.**

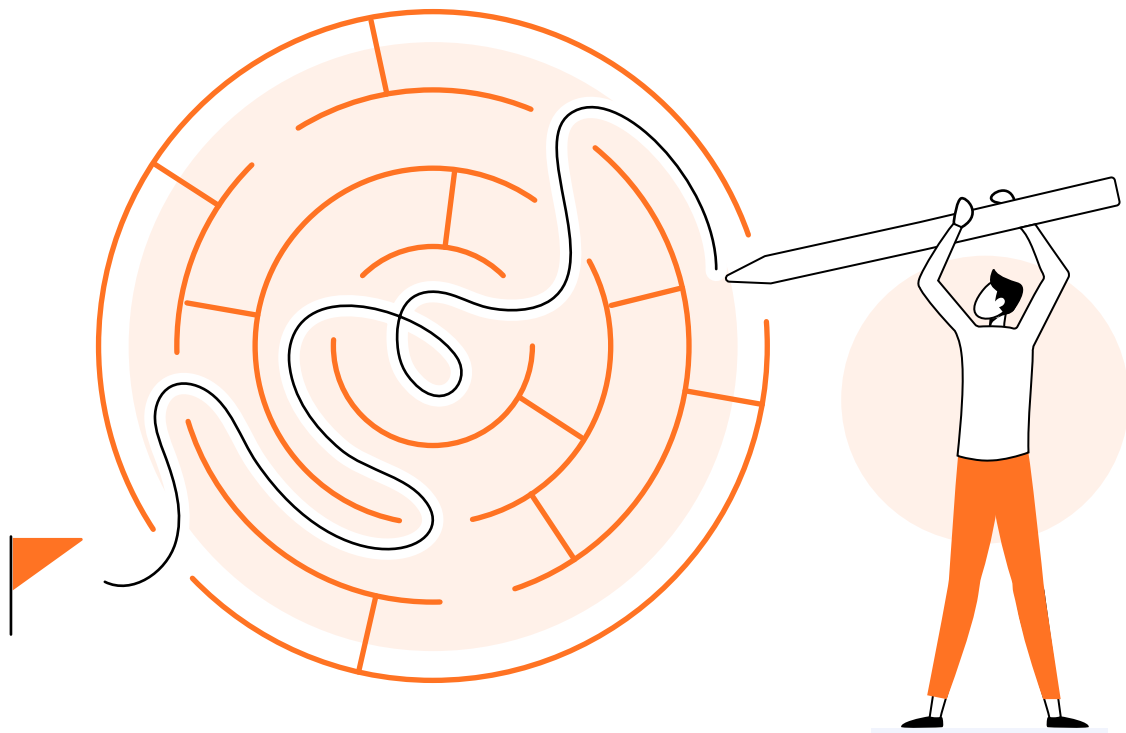


**Jo Goulden**

Head of Marketing

Jo's project team evaluated multiple leading CRM platforms via product demonstrations and scoping meetings but found none as easy to use or customise as Zoho CRM. Zoho's wallet-friendly price point also helped to seal the deal and KST onboarded the platform with a focus group of 8 initial users. Before long, the positive impact of Zoho was being felt across the business, and Jo extended its reach into a number of different departments. "We thought we'd only have a handful of people using Zoho, but as it's grown, more and more people have come on board, more people see the value in Zoho, and now we have over 60 users," shares Jo.

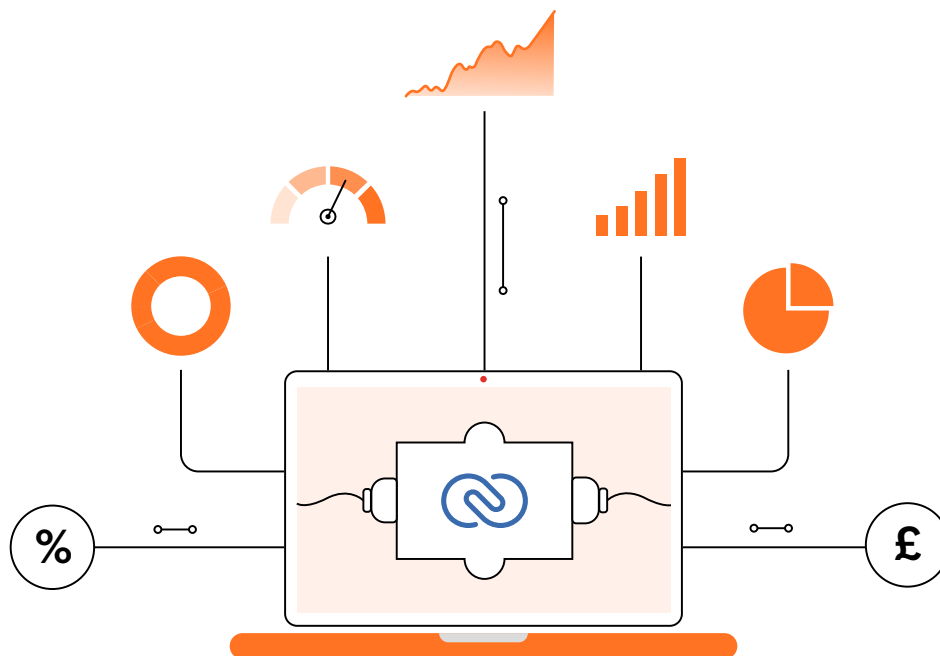
With Bill's expertise on hand, Jo was able to unite each business in the KST group of companies inside one instance of Zoho CRM, using custom layouts, deal stages and pipelines tailored to each business's unique needs. Using filters and views, KST are now able to easily isolate the data from each entity as and when required, or visualise the entire group's performance at their fingertips.



To complete the picture, Jo pulled data into Zoho CRM from both KST's FSM and quoting platforms by setting up an API connection, which flows information back and forth up to five times per day. For example, KST's salespeople can now set the status of an opportunity to a bespoke stage called "quote in progress" to trigger the API to push the new deal data into the FSM. From here, a job is raised and a unique "sales opportunity ID" is generated before being pushed back into the CRM opportunity record. This ID number helps maintain alignment between the two platforms as the deal progresses, ensuring the accuracy of information across the business. Meanwhile, at the close of a deal in the FSM system, the final sales and margin values are also pushed back into Zoho and updated in the opportunity. "It ensures that Zoho is kept absolutely in line with the field service management software," explains Jo.

Similarly, the API seamlessly ensures that KST's detailed quotes are reflected inside the CRM against each client's account. "DYMENSION allows our BDMs to build very complex quotes that can be up to millions of pounds, and that information then goes back into the FSM and then back into Zoho," explains Jo.

# From blah to aha! Energising sales meetings with CRM



Using Zoho CRM, KST has successfully streamlined the format, content and duration of its weekly sales meetings. Where once each salesperson had to transpose their sales figures, prospects and targets into a PowerPoint presentation and then deliver them to the group, CRM now does the heavy lifting.

During each meeting, KST can simply navigate to the Opportunities module to see all of the deals in the group's pipeline, then filter by salesperson, stage, value or product type to drill down into the specific numbers. Using CRM in this way keeps the format of the meetings consistent from salesperson to salesperson and week to week. What's more, the meetings have become significantly less time-consuming and have reduced the workload on the team, who no longer have to prepare detailed reports in advance.

"It makes sales meetings much more dynamic, much more accurate and we have a better view of everybody's pipeline. We all find the meetings much more enjoyable and meaningful. Zoho is much preferred... rather than different, inconsistent PowerPoint presentations and spreadsheets," explains Jo.



# Reporting reaches new heights with Analytics



I knew from the outset, because they'd talked about reporting, **that Analytics was going to be on the cards.**



## Bill Quinn

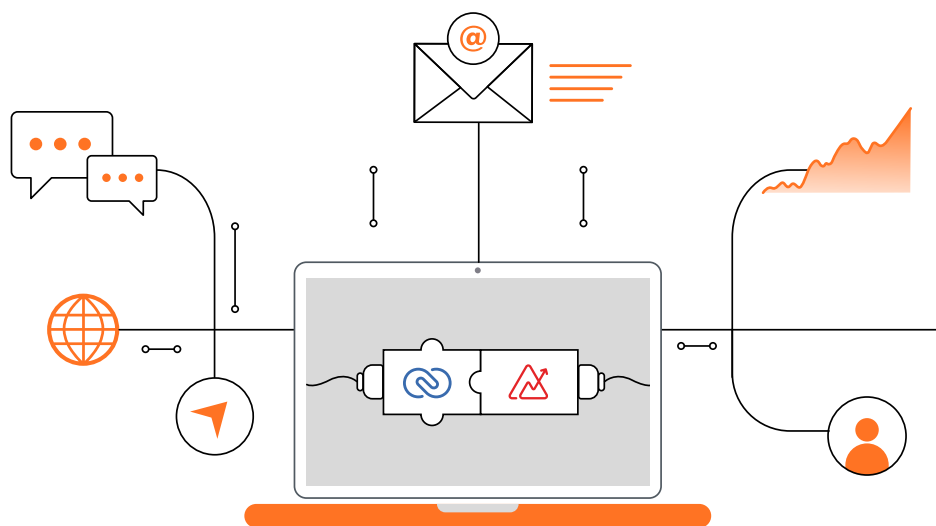
Founder and Owner, 1 Cloud Consultants

As KST's CRM Champion, Jo quickly mastered the platform's powerful reporting features, easily setting up custom reports for key colleagues before automatically scheduling them to be emailed out as required. For instance, the Operations team now receives a weekly report of all the opportunities set to a "quoted 100%" stage, so that they know which opportunities are likely to require scheduling within the next week and can plan resources accordingly. "I think people think that I sit there all day creating reports, but literally I've just set them up once and scheduled them! It's really straightforward," says Jo.

However, KST's CEO was pushing Jo for ever more detailed and comprehensive reports, charts, graphs and widgets for his monthly board report, stretching the limits of Zoho CRM's inbuilt reporting. Jo turned once again to Bill for support, who directed her to Zoho Analytics, a BI platform that integrates with CRM like a glove. With Analytics on board, KST can dive deeper than ever before into every entity's data and can dissect and visualise it in a myriad of colourful, interactive and innovative ways.

For example, Jo enters each division's targets into Analytics and can then generate a dynamic speed dial widget which reflects where their sales are compared to that target. Widgets like these allow KST's senior management to easily digest complex business statistics at any time and from anywhere, and right from a personalised Analytics dashboard.

With Bill's guidance, Jo's experience of Analytics has been at once simple and yet deeply empowering. Easy to deploy and set up, Analytics has enabled her to fulfil any business intelligence request from her colleagues, her CEO and beyond. One such success story is the CEO's board report. "Bob can easily copy and paste graphs and charts from Analytics into his reports. That then gets forwarded to all our stakeholders. He believes that using Zoho Analytics saves him several hours a month," beams Jo. "I gave Jo the tools to get started with Analytics and she was able to grasp that and build the reports that the board needed," adds Bill.



As a business with many moving parts, including several separate divisions, complex evolving quotes, a diary full of live jobs and a growing number of clients, extrapolating live data from Zoho CRM is critical to keeping a pulse on KST's performance. Because CRM integrates seamlessly with Analytics, the group can access the real-time insights it needs at the click of a button. "It's a really easy system to use. Analytics plugs directly in with Zoho CRM. We know we always have accurate data," adds Jo.

It's clear that combining Zoho CRM's savvy sales prowess with Zoho Analytics's arithmetical acumen has truly delivered a **software solution that's fit for Kings!**



## About 1 Cloud Consultants

With over a decade of experience, 1 Cloud Consultants is dedicated to providing top-notch services in reselling, training, consultancy, implementation, and ongoing support for Zoho products. Its long-standing partnership with Zoho, which began in July 2012, ensures that its team bring unparalleled expertise and commitment to its clients across the UK and beyond.

To learn more about 1 Cloud Consultants, visit: <https://www.1cloudconsultants.com/>



## About Zoho CRM

Zoho CRM is a cloud-based customer relationship management software that helps businesses deliver fantastic customer experiences and drive growth. The platform manages every aspect of sales, marketing and support. Offering omnichannel presence, segmentation, predictive intelligence, analytics, customisation, integration, and more, Zoho CRM empowers more than 250,000 global customers.

Please find out more via our website: <https://www.zoho.com/CRM>



## About Zoho Analytics

Zoho Analytics helps business users connect, prepare and analyse their data, create stunning data visualisations and discover hidden insights - all within minutes. A trusted BI platform with over three million users around the world, Zoho Analytics serves up actionable business data that can deliver a competitive edge, highlight opportunities or streamline processes. To see what Analytics can unlock for your business, arrange a free trial today.

Please find out more via our website: <https://www.zoho.com/analytics>



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Zoho CRM



Zoho Analytics

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