

GoldenLion Implements Law Firm CRM for AndersonDodson, P.C.

Introduction

AndersonDodson, P.C. is a law firm specialising in recovering wages for unpaid and underpaid employees. They've searched the market for a simple, easy-to-manage CRM system for quite some time.

Finally AndersonDodson zeroed in on ZOHO CRM, with GoldenLion as their implementation partner. GoldenLion customized ZOHO CRM for their law firm and helped them get started with 2 users.

AndersonDodson have been successfully using the CRM system for quite some time now and commissioned further enhancements with the help of GoldenLion.

Business Name

AndersonDodson P.C.

Company Profile

- **INDUSTRY** LAW FIRM
- **TYPE** B2C
- **LOCATION** NEW YORK, USA
- **USERS** TWO

CRM Criteria

- EASY-TO-USE
- SCALABLE
- COST EFFECTIVE



CASE STUDY

Background

AndersonDodson is one of the most innovative and tenacious worker's rights law firms in New York city. The firm was founded with a mission to ensure that employees get what they deserve!

Founded and run by some of the brightest legal minds in the United States, the firm soon got recognized for their humane approach and high degree of commitment towards their clients. Their reputation grew and so did the number of leads they were getting, clients they were handling and work they were managing.



We needed a robust CRM solution for our firm. Every single day we are meeting new prospects who trust us with their problems. Keeping their details well documented is of crucial importance to us. So, we went for ZOHO. However, I wanted to get the maximum out of the software and wanted to customise it for the unique requirements of our business. Here, we faced a challenge; we had neither the required expertise nor adequate time to tailor the application successfully.

PENN DODSON

Attorney, Firm Owner
AndersonDodson P.C.

Problem Statement

Being a workers' right law firm, their business process is fairly different than any other business. They follow a stringent qualification process before taking client on-board. The intake process comprises several steps and in each step the firm has to maintain accurate records and documentations.

Managing everything manually became a huge challenge. In fact, they were devoting a significant amount of their time towards maintaining records and keeping track of the in-take process.

So, AndersonDodson started looking for an easy-to-use CRM system. After trying out a few products they zeroed in on ZOHO CRM.

Once they purchased the subscription, setting up the application and customizing it for their exact business process was required. Given the fact that neither Penn nor her partner had the time to go through the learning curve, they were on the look out for an implementation partner with experience and expertise.

Penn got to know about GoldenLion from ZOHO and reached out.

CASE STUDY

Finding a Solution

The expert ZOHO consultants from GoldenLion ended up not only setting up ZOHO CRM for AndersonDodson but also customized it to address the unique needs of the firm. Once ZOHO CRM was implemented, GoldenLion also offered ZOHO campaign solutions which let them automatize all their drip campaigns.

The complete synchronization of ZOHO CRM and campaign not only ensured smooth transition of leads to clients, but also created auto-generated follow up tasks post e-mail campaigns. Moreover, the campaign tool customized by GoldenLion ruled out any scope of duplicate campaign or contacts and thus made the system completely error free.

Another area where AndersonDodson needed a help was their "Contact Us" form. While their website previously had a basic web form where visitors could leave their contact details and request a callback, there was no way to segregate the visitors into categories such as leads, general queries, press etc.

GoldenLion further customized the web forms to incorporate more fields where the visitors can state their intent. This data now goes straight to the CRM, segregated into various categories on real time basis; so that, contacting the person and following up becomes super simple.

Solutions Offered

- GoldenLion customized ZOHO CRM and set it up for AndersonDodson.
- GoldenLion also set up ZOHO Campaigns and integrated the same with ZOHO CRM for automated e-mail campaigns.
- The "Contact Us" form on AndersonDodson website was custom tailored by GoldenLion. AndersonDodson now receives all their leads, queries etc. direct on their CRM.





Penn Dodson

Attorney, Firm Owner, AndersonDodson P.C.

About ZOHO

“My firm uses ZOHO CRM every day. When a new potential client contacts us through the web form, the details get automatically saved in the CRM, and from there we can convert the lead into customer, set follow up tasks, schedule meetings and much more. With the help of the customized CRM and web form, we can now keep track of, and follow up with everyone who reaches out to us, so that nobody falls through the cracks.”

About GoldenLion

“The GoldenLion team has surpassed my expectations. Sometimes I think they are magicians, the way they can fully grasp and understand our requirements. They have been responsive, enthusiastic, and extremely professional. They have both listened to what we have said we wanted, while also teaching us about aspects of the software we didn't know that we didn't know.”

CASE STUDY

About GoldenLion

Starting its journey as an Alliance Partner of Zoho Corporation, GoldenLion has become one of the top Zoho consultation companies all over the world today. Since our inception in 2010, we have been helping small and mid-size businesses across the world in automating and structuring their entire business process by offering all around consultation for Zoho Suite of Products and customizing them to fit our clients' business requirements.

We started our Digital Transformation division in 2016 with an aim of offering 360 degree solutions. Through this service, we not only create beautiful websites and landing pages, but offer an all around consultation and services for strengthening your digital presence as well as helping you get more traffic on your website, convert that traffic into leads and finally convert the leads into customers!

With 400+ customers in 30+ countries, today we are all set to become a trusted growth-partner to your business! Here's what [customers have to say about our service](#).



We love to hear from you!

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