



POWERED BY
BUSINESS FINANCE
Advice

AI Sales

Growth BI

A Transformative Approach to Client Acquisition and Management

In today's fiercely competitive landscape, businesses face the dual challenge of attracting qualified leads and delivering exceptional client experiences. Our AI Sales solution is designed to propel your sales to new heights of success whilst maintaining quality service.

By harnessing the combined power of Zoho Social, Zoho CRM, WhatsApp Business API and by the professional support of our AI Growth Mentor we will empower your business to:






- Forge unbreakable client relationships
- Automate lead generation
- Streamline operations

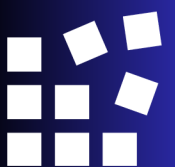
This is not just about adopting new technology, it's about embracing a transformative approach that fosters client loyalty, maximises efficiency, and unlocks unprecedented growth.

Prepare to witness a paradigm shift in how your business connects with clients, manages operations, and achieves lasting success.



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The rise of Social Media >>>

Social media has revolutionised how people seek professional services. Many now turn to Social Media for referrals on tradespeople, professional services and often find valuable insights through user reviews and testimonials. This trend is driven by the desire for trust and convenience. Social media provides a more organic and often free alternative for sharing experiences and trusted recommendations.



By leveraging social media listening tools, businesses can tap into a vast pool of potential leads, monitor brand reputation, and engage with customers directly. This empowers businesses to build stronger relationships, drive growth, and gain a competitive edge in the digital age.



Zoho Social >>>

Zoho Social isn't just a social media management tool, it's an AI-powered lead generation machine that empowers businesses to attract, engage, and convert ideal clients with ease.

Stop wasting time and resources on ineffective marketing.

Let Zoho Social do the heavy lifting, so you can focus on what you do best – helping clients achieve their dreams.

It's time to harness the power of AI to attract your ideal clients with Zoho Social

Laser-focused Targeting

Zoho Social uses AI to identify people seeking professional services to carry out their works . It targets potential clients precisely based on their online behaviour, demographics, and interests. This allows you to connect with potential clients instantly, maximising your reach and impact.

Effortless Engagement

No more manual searching or endless scrolling. Zoho Social automatically joins relevant conversations, answers questions, and positions your business as an industry expert. Build trust and authority with minimal effort, allowing your team to focus on converting qualified leads.

Lead Capture on Autopilot

Turn social media engagement into a lead generation powerhouse. Promote free consultations, webinars, or downloadable resources to capture contact information and nurture those leads through your sales funnel. Zoho Social automatically captures leads and feeds them directly into your CRM, ensuring no opportunity slips through the cracks.





Zoho CRM

Zoho CRM is the solution to the chaos of spreadsheets and sticky notes. It's the orchestrator of your business, harmonising your client relationships.

More than just software, Zoho CRM is a strategic partner that empowers your business to build stronger client relationships, optimise operations, and achieve sustainable success.

By effortlessly tracking interactions, preferences, and milestones, your business can streamline workflows, automate tasks, and gain valuable insights.

This empowers you to make data-driven decisions and scale your business efficiently, ultimately leading to stronger client relationships and sustainable growth.



Your Client Command Centre

Effortless Lead Management

Capture leads from every source – social media, website forms, referrals – and automatically segment them based on their needs and goals. No more missed opportunities or disorganised data.

Personalised Engagement at Scale

Craft targeted email campaigns, automate follow-ups, and personalise communication based on individual client journeys. Nurture relationships and build trust with every interaction.

360-Degree Client Insights

Access a complete history of every client interaction, from initial inquiry to application status and payment history, all in one central, easily accessible location.

Seamless Team Collaboration

Empower your team to work together seamlessly. Assign tasks, share notes, and collaborate on client cases with unparalleled efficiency.

Data-Driven Decision Making

Gain a crystal-clear view of your business performance. Track key metrics, identify trends, and make informed decisions to drive growth.





Tired of the limitations of basic WhatsApp?

WATI is the solution. It unlocks the full potential of WhatsApp Business API, transforming it into a powerful tool for personalised, efficient, and engaging client communication. More than just a WhatsApp tool, WATI is a comprehensive communication platform that empowers businesses to deliver exceptional client experiences, streamline operations, and drive growth.

By providing personalised support, sending automated messages, and quickly responding to inquiries, your business can automate routine tasks, manage large teams, and gain valuable insights from detailed analytics. This allows you to attract new clients, nurture existing relationships, and increase conversions. Transform WhatsApp into a powerful engine for your business with WATI.

Your WhatsApp API Supercharger

Instant Communication, Elevated

Respond to client inquiries in seconds, share documents with a single click, and provide real-time updates on their cases. WATI takes the speed and convenience of WhatsApp and supercharges it with powerful features designed for businesses.

Personalised Messaging That Wows

Craft targeted messages that resonate with each individual client. Use client data from Zoho CRM to personalise greetings, offers, and updates, creating a truly bespoke experience.

Effortless Automation

Say goodbye to manual tasks. WATI automates notifications for appointment reminders, payment confirmations, and application status updates, freeing up your team to focus on high-value client interactions and growing your business.

AI-Powered Efficiency

Deploy intelligent chatbots to answer frequently asked questions, qualify leads, and provide initial support. WATI's chatbots can even schedule consultations and capture client information, streamlining your intake process and maximising efficiency.

Zoho Books

Zoho Books is a powerful cloud-based accounting software that seamlessly integrates with Zoho CRM and WATI, providing a comprehensive solution for managing your finances. By leveraging Zoho Books, your business will be able to streamline its financial operations, gain real-time insights into its financial performance, and enhance its overall efficiency.

By integrating Zoho Books with WATI and Zoho CRM, you can achieve a streamlined and efficient financial workflow. The powerful combination of these tools empowers you to make data-driven decisions, improve operational efficiency, and drive business growth.



Your Financial Compass

Client Information Sync

Client information captured by WATI, such as contact details, service inquiries, and appointment preferences, is seamlessly transferred to Zoho CRM. This ensures a unified view of client data across all platforms.

Invoice Generation and Payment Tracking

Once a client is converted into a lead or opportunity in Zoho CRM, Zoho Books can automatically generate invoices based on the agreed-upon services. Payment information, such as payment dates and amounts, is automatically updated in both Zoho CRM and Zoho Books.

Real-time Financial Insights

Monitor key financial metrics like revenue, expenses, and profitability. Track cash flow and identify potential cash flow issues. Analyse the financial impact of different services and client segments.

Predictive Analytics

- Forecast future revenue and expenses.
- Identify trends and opportunities for growth.
- Optimise pricing strategies and resource allocation.

Customizable Dashboards

- Create customized dashboards to visualize key financial metrics.
- Track performance indicators and identify areas for improvement.
- Share insights with team members to foster informed decision-making.



The Dream Combination 

A Symphony of AI-Powered Tools



Imagine a system where every tool works seamlessly, guiding clients from inquiry to sale. This AI-powered ecosystem orchestrates success for your business.

Uncover Hidden Leads with our AI-Growth Mentor

Scenario:

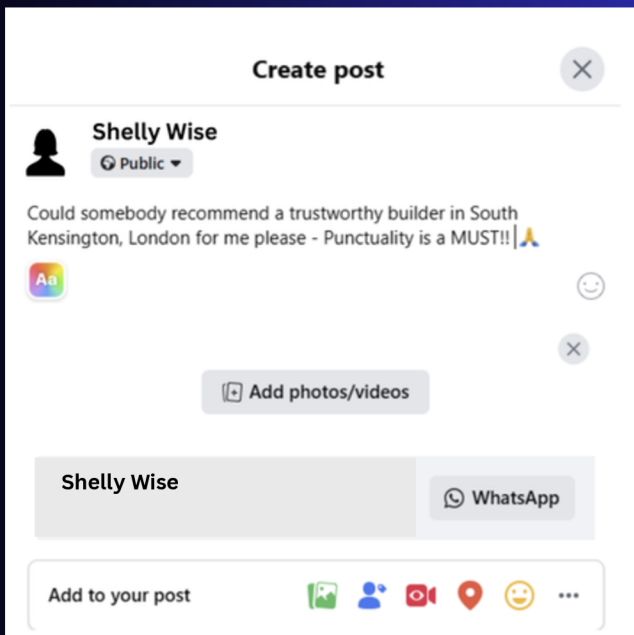
A homeowner in South Kensington seeks an experienced builder for a home extension. To build confidence and find reliable recommendations, she utilises popular social media platforms to enquire about referrals from her friends and her wider network. Let's explore the journey from this initial enquiry to hiring an experienced builder.



Step 01



Social Post



Your potential lead takes to social media to find an experienced builder in South Kensington, London.

Step 02



Now that your client has updated all her Social Media platforms and done all her research as to where to ask help for - the fun begins.

Social Platforms Update

Zoho Social will now meticulously scan the World Wide Web, monitoring keywords & geographical parameters set by you to capture targeted profile details relevant to your target audience.



Social Listening

Step 03

#SouthKensingtonBuilder

#SouthKenRenovation

#SouthKensingtonLoft

#SouthKensingtonBricky

#SouthKenPlumber

#SouthKensingtonContractor

#SouthKenRoofer

#SouthKensingtonElectrician

#SouthKensingtonTiler

#SouthKenPlaterer

Zoho Social Listens: Imagine a potential client scrolling through Instagram, expressing their desire to hire services you provide? Zoho Social's AI-powered listening engine will capture this crucial intent, analyse keywords, hashtags, and sentiments to identify a hot lead for you to nurture.



CRM Lead Capture

CRM Takes the Baton: This lead is enriched with additional data – demographics, geographics, and more. This information allows for precise segmentation and personalised communication.



System Update

Step

04

These leads shall now get automatically transferred to Zoho CRM, streamlining the process and ensuring no leads are missed. This integration provides valuable insights into the performance of your social media campaigns, helping your business measure the effectiveness and support re-investment opportunities.

Step

05



wati

WhatsApp API Client Nurturing

WATI Enters the Stage: Armed with relevant client data from Zoho CRM, WATI initiates a pre-programmed chatbot conversation on WhatsApp. The chatbot greets the lead, answers preliminary questions, and even assesses their eligibility for any residential grants, enticing the client further.

Our innovative process leverages the power of Zoho Social and WhatsApp API to streamline lead generation and customer engagement. When a potential lead is identified on social media, a personalised WhatsApp API message containing a unique QR code is instantly sent. Your potential client shall scan this code with their smartphone and effortlessly share their contact information and service requirements directly with you via Chatbot Technology.



QR Scan Code Sent

Step 06

Now is the time to override the power of your Chatbot Technology and grasp the opportunity to personally add value and begin the process of nurturing your client. This streamlined approach not only accelerates the lead conversion process but also enhances customer satisfaction by offering a convenient and efficient way to connect with your client.



We call it the "Human Touch"

Step 07



Invoicing, BI & MI

Once you have won the deal, leverage the power of BI & MI within your integrated Zoho ecosystem. Seamlessly connect Zoho CRM and Zoho Books to automate your sales and invoicing. This not only streamlines your operations but also provides valuable data insights for informed decision-making. By analysing sales trends, customer behaviour, and financial performance, you can optimise your business strategies and drive sustainable growth.

Unlocking Financial Mastery

Cash Flow Visibility: Monitor cash flow in real-time, forecast future revenue, and make data-driven financial decisions.

Budgeting and Forecasting: Utilise historical data and AI-powered analytics to create accurate budgets and forecasts, ensuring financial stability and growth.

Performance Tracking: Monitor key performance indicators (KPIs), such as client acquisition cost, customer lifetime value, and return on investment (ROI), to optimise your strategies and maximise profitability.

Data-Driven Insights: Gain access to a wealth of management information (MI) and business intelligence (BI) reports, empowering you to understand client demographics, identify trends, and make informed decisions.

Real-Time Reporting: Access real-time insights into your business performance with real-time reporting (RTI), allowing you to monitor progress, identify challenges, and adapt your strategies on the fly.

From initial implementation through ongoing execution, I'll function as an extension of your team, providing not just mentorship but hands-on guidance and practical problem-solving. This encompasses proactive identification of challenges, development of tailored solutions, and continuous optimisation of your strategies based on real-world performance data, for example...

Bespoke AI Experiences: I'll develop custom chatbots tailored to your business's needs, ensuring intelligent lead qualification, personalised interactions, and efficient FAQ handling through NLP and continuous optimisation.

Strategic Campaigns: I'll develop data-driven campaigns across all channels (social media, WhatsApp, email) to maximise lead generation and engagement through A/B testing and ongoing optimisation for maximum ROI.

Actionable MI & BI: I'll create concise MI & BI dashboards providing actionable insights for data-driven decisions, KPI tracking, and strategic growth through custom reporting and data visualisation.

Navigating Uncertainty: I'll help your business adapt to changing market conditions and maintain a competitive edge through data-driven insights and agile strategies.

Sustainable Growth: I'll help your business develop strategies to maximise client lifetime value, optimise resource allocation, and achieve consistent, long-term growth.

Outpacing Competition: I'll position your business as an industry leader by leveraging cutting-edge AI and data-driven strategies to attract and retain top talent and clients.

“I engineer sustainable growth strategies by seamlessly integrating cutting-edge AI tools in line with your business’s DNA. This isn't about simply installing software, it's about building a future-proof foundation for you and your future.”

Application	Description	Monthly	Yearly
Zoho CRM	Comprehensive CRM platform for managing leads, contacts, and client interactions.	£40	£420
Zoho Social	AI-powered social media management tool for monitoring conversations, engaging with leads.	£50	£420
WhatsApp Business API - WATI	WhatsApp Business Solution Provider for integrating WhatsApp with Zoho CRM and Social, enabling chatbot integration and advanced automation.	£50	£600
WATI - Usage	Marketing Budget Approx	£100	£1,200
Zoho Books	Cloud-based accounting software that seamlessly integrates with Zoho CRM to manage invoices, expenses, and financial reporting. Gain real-time insights into your financial health and streamline your accounting processes.	£24	£240
	Total	£264	£2,880

*These costs are approximate, based on standard subscription plans, and may vary depending on specific requirements and usage. Accurate pricing will be provided upon subscription. These costs exclude professional fees. Key considerations include usage-based WhatsApp API pricing, choosing the right Zoho CRM/Social plan for your needs, selecting a suitable WATI tier, and leveraging the integrated Zoho Books for financial management. Careful planning ensures optimal investment and maximum ROI.



AI Growth Mentor - Pricing & Plans >>>

Boosting Revenue with Intelligent Automation

Service	Description	IGNITE £90K	AMPLIFY £250K	DOMINATE £500K
Initial Consultation *refunded	We'll build rapport, understand your needs, present tailored solutions, and outline the path forward for your business growth.	£50	£100	£150
Zoho Social	AI-powered social media management tool for monitoring conversations, engaging with leads.	£350	£600	£850
Zoho CRM	Comprehensive CRM platform for managing leads, contacts, and client interactions.	£1350	£2200	£3250
WhatsApp API - WATI	WhatsApp Business Solution Provider for integrating WhatsApp with Zoho CRM and Social, enabling chatbot integration and advanced automation.	£750	£1400	£2050
Zoho Books	Cloud-based accounting software that seamlessly integrates with Zoho CRM to manage invoices, expenses, and financial reporting. Gain real-time insights into your financial health and streamline your accounting processes.	£1050	£1900	£2950
Total	Per Annum	£3500	£6100	£9100
	Monthly	£292	£508	£758
	Marketing % of Turnover	3.89%	2.44%	1.82%

NFC Touch & QR Code Scanner

Effortless Customer Acquisition

Imagine a world where customer data acquisition is seamless and organic. Our NFC Touch QR Code Scanners make it a reality. Simply place these sleek devices at strategic locations in your restaurant, retail store, or any business with a physical presence.

How it Works

Customers simply scan the QR Code or tap their NFC-enabled smartphone on the scanner. This instantly triggers a pre-designed welcome message and a prompt to share their contact information.

The Impact

- **Direct Customer Engagement:** Build your own first-party customer database without intrusive methods.
- **Personalised Experiences:** Tailor offers, promotions, and loyalty programs to individual customer preferences.
- **Increased Customer Lifetime Value:** Nurture long-term relationships and drive repeat business.

Compliance

By actively opting-in, customers grant explicit consent, ensuring full compliance with GDPR.



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Leave the rest to us...

We will seamlessly integrate this technology into our AI-powered Lead Generation system.

This means:

- **Automated Data Capture:** Your CRM automatically captures customer data, streamlining your marketing efforts.
- **WATI Integration:** Leverage WATI's powerful communication channels to engage with customers through personalised messaging, offers, and support.
- **Data-Driven Insights:** Gain valuable insights into customer behaviour and preferences to optimise your marketing strategies.

Unlocking Business Growth:

By offering a seamless and engaging customer experience, you'll cultivate loyalty, drive sales, and gain a competitive edge.



FUNDING & EXTERNAL INTEGRATIONS >>>

Affordability

What if we told you that harnessing the power of AI is more accessible than ever before? The UK government and local councils recognise the transformative potential of AI and have established a diverse range of funding programs designed to support businesses in their AI adoption journey. These initiatives offer a significant financial boost, covering a substantial portion of software and hardware costs.

From grants and subsidies to tax incentives and loan programs, a wealth of funding opportunities exist to help you integrate AI seamlessly into your business operations. Whether you're a small startup or an established enterprise, exploring these funding avenues can unlock significant cost savings, accelerate your AI implementation, and propel your business to new heights of success.

Don't let limited resources hinder your AI ambitions. Leverage the available funding to unlock the full potential of AI and gain a competitive edge in the marketplace.

Adaptability

Zoho, seamlessly integrates with your existing business tools.

Effortlessly connect with:

Accounting: Xero, QuickBooks Online, Sage

Email Marketing: Mailchimp, HubSpot, Constant Contact

E-commerce: Shopify, WooCommerce, Magento

Project Management: Asana, Trello, Monday.com

This interconnected approach streamlines workflows, improves data accuracy, and provides a 360-degree view of your customers.

Easily expand the system to accommodate new integrations as your business evolves.

Experience higher conversion rates and accelerate your path to success with AI Sales.



Ready to Unlock Your Business Growth? >>>

Imagine a sales engine fuelled by AI, expertly mentored by a qualified savvy accountant with over two decades of experience. Our integrated solution, combining Zoho Social, CRM, WATI, and Books, streamlines your entire sales funnel from lead generation to revenue recognition. You gain access not just to cutting-edge technology, but also a wealth of financial and strategic knowledge. This holistic approach empowers you to make data-driven decisions, optimise your sales processes, and achieve sustainable, long-term growth.

AI Sales

Auto Lead Gen

“AI is advancing rapidly, don't get left behind.”

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