

GoldenLion Implements Zoho One for Safari Experts

Introduction

Safari Experts is a boutique travel agency specializing in fully customized luxury safari experiences worldwide.

As a family-run business with a long history of traditional practices, Safari Experts was managing most of their operations manually. Recognizing the need for digital transformation, they chose GoldenLion's Travel Agency CRM, built on Zoho CRM Enterprise Edition, to streamline their processes.

GoldenLion not only implemented the Travel Agency CRM for Safari Experts but also developed tailored customizations to address the unique requirements of their business.

Beyond the CRM, Safari Experts expanded their use of Zoho's suite of tools, including Zoho Forms, Zoho Sign, and Zoho Campaigns, to further enhance their operations.

Business Name

SAFARI EXPERTS

Company Profile

- INDUSTRY TRAVEL AGENCY
- TYPE B2C
- HQ UNITED STATES
- USERS 7

Selection Criteria

- ONE SUBSCRIPTION, MULTIPLE APPS
- PROPER PARTNER SUPPORT
- BUDGET-FRIENDLY
- INDUSTRY SOLUTION
- FAST GO-LIVE



SAFARI EXPERTS

CASE STUDY

Problem Statement

Safari Experts, founded by Tim Lapage many years ago, reflects his passion for adventure and his commitment to crafting unique, standout itineraries. As an avid explorer, Tim always prioritized venturing into uncharted territories and delivering exceptional travel experiences.

However, the business operated primarily on paper, with crucial documents stored in physical folders. This traditional approach posed challenges in efficiency and accessibility. When Tim's daughter, Tana, began taking a more active role in the company, she quickly recognized the need for modernization. She envisioned a robust, cloud-based CRM solution that could streamline operations and enable seamless access to critical information from anywhere, at any time.



WHY ZOHU ONE?

- Zoho One offered a unified platform with multiple integrated apps, catering to all their business needs in one place.
- With GoldenLion's Travel Agency CRM built on Zoho CRM, they could implement the solution rapidly.
- Zoho CRM stood out as the most user-friendly tool, perfect for a team new to CRM systems.
- The ability to access and manage the CRM via a mobile app allowed their team to stay connected and productive on the go.
- GoldenLion's deep understanding of the travel domain and tailored CRM solution gave Safari Experts the confidence to move forward.

Finding GoldenLion

Safari Experts had never used a CRM system before, so they sought a solution that was intuitive and perfectly aligned with their business needs.

During their search, they discovered Zoho CRM through a Google search and realized it met many of their requirements. However, being a horizontal CRM system, Zoho CRM wasn't specifically tailored for the travel industry.

To address this, they contacted Zoho to inquire about partners with expertise in the travel domain. The Zoho team recommended GoldenLion, known for their specialized industry solution for travel agencies.

After booking a meeting with GoldenLion, Tana was introduced to the Travel Agency CRM and found it to be the perfect fit for their business!

CASE STUDY

Implementing Zoho One

GoldenLion initially implemented the Travel Agency CRM for Safari Experts, ensuring a seamless setup tailored to their needs. Following the implementation, GoldenLion dedicated about a month to training the Safari Experts team, enabling them to fully leverage the CRM's capabilities.

To streamline data capture, Safari Experts required several forms to integrate with the CRM for collecting prospect and customer details effortlessly. GoldenLion addressed this need by creating and integrating these forms using Zoho Forms, ensuring a smooth flow of information into the CRM.

In addition to this, GoldenLion later assisted Safari Experts in implementing Zoho Sign for digital document signing and Zoho Campaigns for efficient email marketing. Today, Safari Experts uses Zoho CRM to manage their sales process end-to-end. This has not only enhanced their operational efficiency but also empowered them to run their business seamlessly, even while on the go.



Future Plans

"Our business continues to grow and operate more efficiently than ever. Now, we're looking to Zoho and GoldenLion to explore how we can further streamline our processes and take our efficiency to the next level."

TANA LAPAGE

Director,
Safari Experts

SOLUTION OFFERED

- Deploying Travel Agency CRM, an industry-specific solution built on Zoho CRM, tailored to meet the unique needs of the business.
- Designing and integrating multiple forms using Zoho Forms to seamlessly capture prospect and customer details into the CRM.
- Implementing Zoho Sign for digital signatures and Zoho Campaigns for efficient email marketing.
- Providing extensive training and hands-on support to ensure successful onboarding and effective utilization of the Travel Agency CRM and other Zoho apps.



TANA LAPAGE

DIRECTOR
SAFARI EXPERTS

About Zoho and GoldenLion

"The team at GoldenLion is incredibly helpful and efficient. They customized our CRM specifically for our travel business, significantly improving our efficiency. No request is ever too much for them. I highly recommend GoldenLion and Zoho."

CASE STUDY



About Goldenlion

Starting its journey as an Alliance Partner of Zoho Corporation, GoldenLion has become one of the top Zoho consultation companies worldwide.

Since our inception in 2010, we have been helping small and mid-size businesses worldwide automate and structure their entire business processes by offering all-around consultation for the Zoho Suite of Products and customizing them to fit our client's business requirements.

With 900+ customers in 90+ countries, today we are all set to become a trusted growth partner to your business!

[Here's what our customers have to say about our services.](#)

900+
Customers

30+
Team Members

6
Industry Solutions

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