

ZOHO Creator

Profitable transformation for a nonprofit
365 Workplace Safety's
Digital Journey



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Foreword

Founded in 2016, **365 Workplace Safety**, a Texas-based organization, has a unique mission to help businesses stay in compliance with regulations, whether they have designated HR and safety professionals, or if they have a lean business model with staff wearing multiple hats.

This nonprofit organization bestows unlimited online programs and information data access through its growing membership, to help businesses provide a safe workplace for their employees.

With Zoho Creator, they built an online client management solution to manage their customer profiles and automate mundane processes like billing, resources engagement, and more.

We sat down with **Sierra Dwight**, Executive Director, to get the details on how their company ended up utilizing Zoho Creator for their digital transformation needs.





Zoho Creator gives our organization the ability to customize our client database easily and automate a great number of processes so that we can spend more time with our customers instead of entering data and organizing information. Our business would not run as efficiently as it does without the tools Zoho Creator provides us and our excellent IT manager's ability to customize it for us.



Sierra Dwight

Executive Director
365 Work Place Safety

What is 365 Workplace Safety's core business model?

Our founders had a mission to help businesses stay in compliance with regulations, irrespective of their company size. And that's how 365 Workplace Safety was born.

Our team works around the clock to provide 200+ businesses a safe workplace for their employees. We provide hassle-free online access to information on safety and HR resources, like employee handbooks, safety meeting materials, HR assistance, training courses and discounts on motor vehicle reporting, drug testing, and more.

Our comprehensive online resources on safety and risk management materials help businesses to minimize risks, promote wellness, prevent losses, and stay in compliance.



What was the initial software in place to manage your clients?

We didn't have any system in place. In fact, we didn't follow an organized process to grow. Pen and paper was our go-to method to collect customer information. Not just that, from storing basic client details to sharing invoices, we were relying on paper.

As our business grew, managing our customer profiles became inefficient and time-consuming. We were also finding it difficult to track our membership dues efficiently. Overall, a lack of a proper solution took a toll on our customer service.



Why were you looking for a custom solution?



To store, manage, and retrieve our client information with ease



To manage our customer conversations across multiple channels



To automate our mundane business processes, like resource management, billing cycle notifications, and more



Why did you think Zoho Creator would be the best fit?

Credits to our IT manager—without his experience and intelligence, we wouldn't be where we are today in this digitization journey.



We decided to go ahead with the Zoho Creator platform because of its customization and easy integration capabilities.

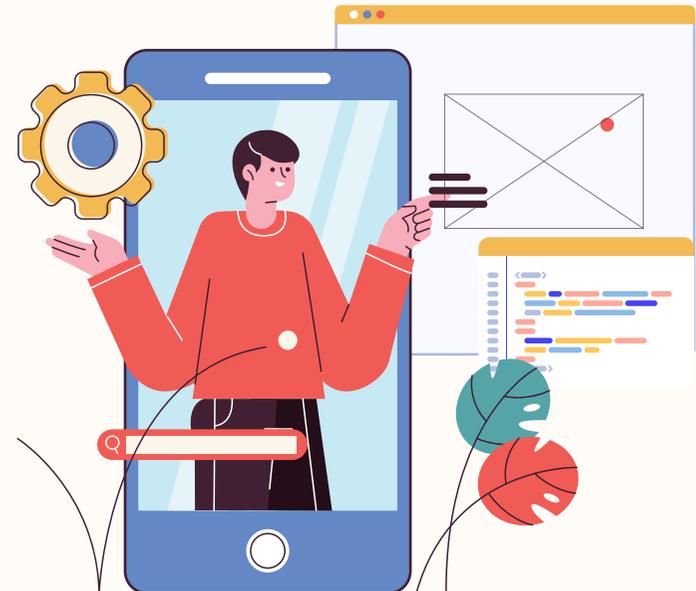


How easy was it for you to build and deploy the application?

I love how customizable it is. We customize it every time we add a new member. I also love that I can do everything in one place. There are few things in life, in business especially, where you can say that.



Our IT manager's experience helped us to build our custom solution. We house all our customer information, outreach conversations, number of years in our organization, billing cycle, online certification resources, and more, all in one place, which is something rare in business.



How great of an impact did Zoho Creator have on your organization?

Zoho Creator has been instrumental and essential to running our day-to-day business. We're able to add notes directly to each member profile and deliver consistent and quality customer support, day in and day out. We've also automated our billing processes to make sure that we don't miss any dues, which does impact our bottom line.

I don't have to remember every little detail on my own. I can rely on the database to store all of that, which helps us to build a better customer relationship



How happy are you with Zoho Creator?

Zoho Creator gave us the ability to build a unique solution for our business needs. The user-friendly platform automated most of our routine tasks, from tracking notes to sending reminders on billing dates. This helped us to spend more time on addressing our customer needs. We have the liberty to add a new field every time a new record is added, which is what we love the most about the platform—**customization**. Our business would not run as efficiently as it does without Zoho Creator.



About us

Running a business is no mean feat, and we believe we can help. At Zoho Creator, we've always worked towards a single purpose—enabling the citizen developer to build functional apps without having to learn to code. Rapidly build custom applications that are a perfect fit for your business, or choose from our extensive range of prebuilt apps and modify them. Just sign up, pick a plan, and start building!





www.zoho.com/creator

We'd love to talk! Reach out to us:
hello@zohocreator.com



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