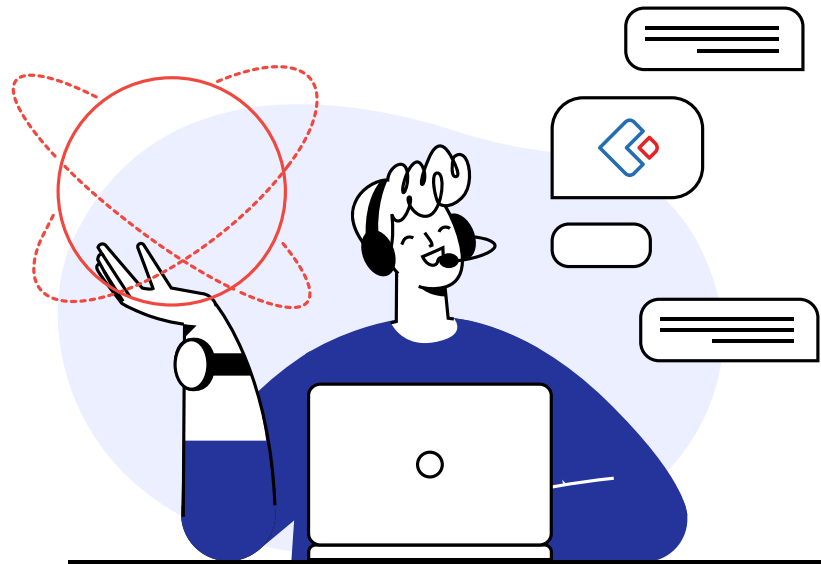


Zhero

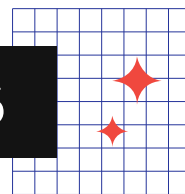
IT issues solved with the comprehensive Zhero Wait low-code app





The Company

WE CRUSH IT CHAOS



Zhero was founded in 2006 by Izak Oosthuizen, a best-selling author and nominee for the UKtech50 2022. Embarking on his career as a senior engineer at a leading IT support services provider in London, Izak saw a disconnect between organisations and the role and function of IT. "They weren't speaking the same language. Neither party was being listened to or heard," Izak explained. That's when the entrepreneur resolved to "stop the vicious cycle of chaotic IT" and established Zhero, a managed service provider (MSP) dedicated to delivering fast and reliable IT support to businesses.



Izak Oosthuizen

Chief Executive Officer

As a leading MSP, Zhero specialises in IT support, cybersecurity, cloud solutions, AI, automation, and data backup, operating a 24/7 always-on help desk. The team's mission is to bring IT harmony to a wide range of clients from industries as diverse as accountancy, law, recruitment, architecture and medicine.

Based in London, with offshore offices in South Africa and Zimbabwe, Zhero is one of the top 3% of IT service providers in the UK and enjoys an impressive 87% client retention rate.

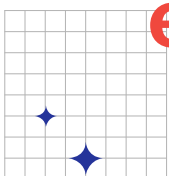
We caught up with Izak Oosthuizen, CEO, Wesley Harris, head of development, and Anri du Toit, head of marketing, to uncover how Zhero built a bespoke software solution using Zoho Creator, aptly named Zhero Wait. They described how the application has transformed Zhero's customer relationship management, sales order processing, ticket management, and more, by prioritising accurate communication and strengthening client trust.

The Challenge

Finding a single platform to handle their operations



We needed a system that was aligned with the MSP and service desk market but that **system didn't exist.**



Wesley Harris

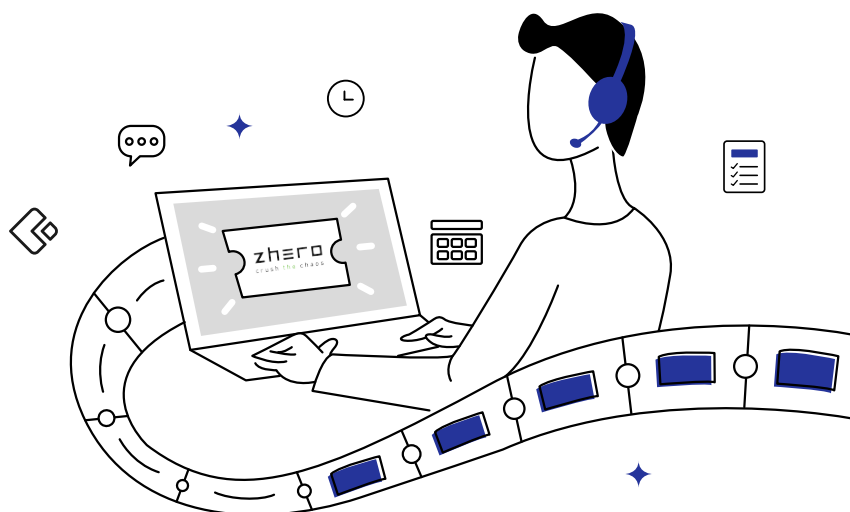
Head of Development

Zhero has always strived to offer its clients a stress-free IT experience. But before discovering Zoho Creator in 2017, the company itself was facing a software dilemma. A collection of disparate platforms resulted in silos in customer data, leading to inaccurate quotations and engineer appointment details. Customer support desk tickets were also slipping through the cracks and going unanswered. Worse yet, when engineers left the business, they took with them IP that hadn't been captured.

These points of failure were slowly eroding customer trust and hampering efficiency. "In this industry, communication with the customer is a top priority. If the customer has a ticket and they're not updated within 24 hours that is really bad...it causes trust issues," explained Wesley.

Zhero needed a platform that could securely contain its extensive customer data. This information was needed to create new quotes and invoices, as well as to raise engineer onsite tasks. Their engineers also needed a responsive mobile app to receive new onsite job notifications and reminders, complete task lists, and record customer sign-offs whilst on site.

Since Zhero prides itself on rapid support—"one of our selling points is that we're zero wait," confirmed Anri—it needed a slick ticketing system to easily log and respond to support requests. Feedback functionality was also critical for tickets, so that customers could rate the service provided. Moreover, the new software had to offer comprehensive reporting, to highlight missed tickets or delays in service, thereby enabling continuous improvement in IT support.



Izak evaluated several CRM systems and helpdesk platforms, but none of them ticked all the boxes. He knew that only a bespoke solution could bring together Zhero's extensive needs in a single space.

"When we were looking at all the options, Creator outweighed the competition because of the amount of customisation potential. We chose Zoho, as it was a blank canvas and I could literally develop exactly what I wanted," stated Izak. "The fact that it was low-code was a big deciding factor," added Wesley. "We were trying to solve some pretty niche things. There's no off-the-shelf software that does all this, so we needed to use Creator."

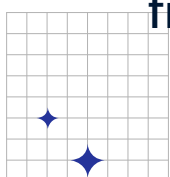
The Solution

From client data to tickets, Creator connects multiple departments on one unified platform



**Introducing
Creator has
streamlined
communication
and collaboration.**

This process impacts sales, support, orders, finance, and projects.



Anri du Toit

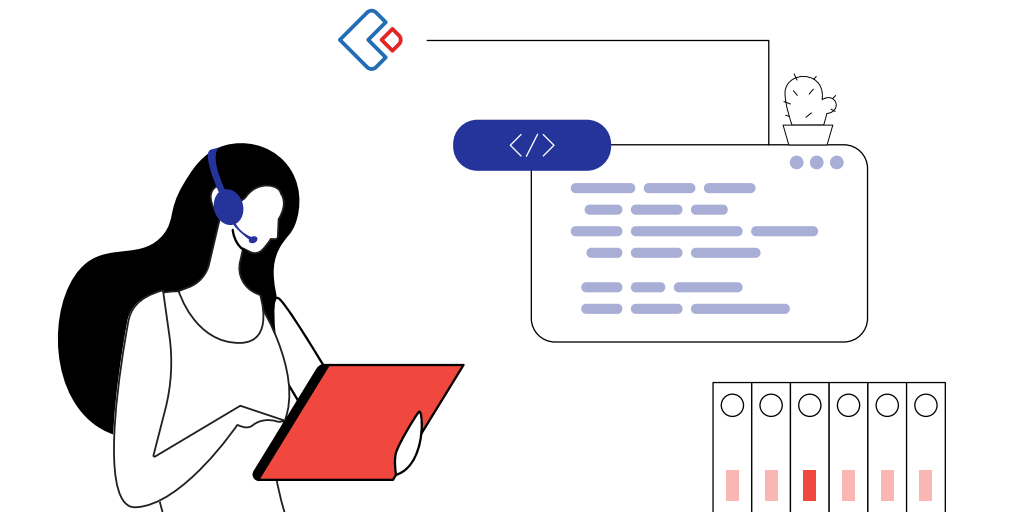
Head of Marketing

Together, Izak, Wesley, and the development team built the bespoke Zhero Wait application using Zoho Creator, an application which now manages almost the entire company's operations. Since 2017, the low-code platform has grown side-by-side with Zhero, providing flexibility for its in-house development department to refine or add features as the business expands.

At its core, Zhero Wait is a powerful CRM. It incorporates a huge database of clients, including primary contacts and locations. The client database is linked to another module that captures the IT assets at each location, plus licencing information and software details. Whenever a client logs a service request, the responding engineer can easily access all the particulars of the business and its IT infrastructure. This drastically reduces the time taken to understand and resolve the client's IT issues.

"Before this system, the engineer would get a ticket and have to figure out what they needed to do. Now it tells them exactly **this** is the asset and its serial number that needs to be worked on, **this** is where it is. It makes it so much easier for them."

-Izak Oosthuizen, CEO, Zhero



If Zhero's team of remote engineers are unable to fix a client's issue, they assign the ticket to an onsite engineer and book a site visit. This process is end-to-end managed inside the Creator application. First, the nominated engineer receives an automated email notifying them of the job date and time, the client location, the point of contact, the affected assets, and the specifics of the problem.

"We send email and push notifications, with a one-hour reminder and another just before they need to be on site. But the main thing is that we can include specific text to explain any quirks at the location or access limitations. All that can be in the emails based on the information captured when we onboarded the client. It's all in the app." - Wesley Harris, Head of Development, Zhero.

Once the engineer is onsite, the Zhero Wait app provides detailed checklists of the work to be carried out. The engineer is unable to progress the ticket until each task has been marked as complete. Anri explained that this feature has helped Zhero improve client satisfaction: "In the past we've had instances of engineers missing things, resulting in an unhappy client and a revisit. The idea of the checklist is to achieve compliance and to leave the site clean. It helps us provide the level of service that we're promising."

Upon completing the job, a satisfaction survey is automatically sent to that client to measure the engineer's performance and promote accountability. "After the ticket closes, a rating request gets sent to the client, where they can choose 1-5 stars. We use this to review how our service is looking," added Wesley.



For additional customer support insights, the application's reporting functionality is key. By analysing reports, Zhero has identified instances of support tickets falling outside of its guaranteed time frame.

"We were struggling with engineers keeping tickets open for a long time, so we developed this 'ticket age' metric. It lets the engineer know that the oldest tickets are the highest priority ones to work on. We saw a clear improvement in ticket closure times after that, and we've added extra functionality that makes sure the engineers update tickets every day." - Wesley Harris, Head of Development, Zhero.

Making CPQ easy

An engineer's visit may identify a requirement for new hardware, such as firewalls, routers, or laptops. Hardware typically falls outside of the client's SLA and is therefore billable, requiring a formal quote to be generated. Before Zoho Creator, Zhero used a standalone quoting application for this process, but experienced a host of problems.

Unlike the Zhero Wait application, customer records inside the application were not easily updated, meaning proposals would often be addressed incorrectly. "It doesn't sit well with the clients when they get a quote and the information on it is wrong. Their names may have changed, the location could be inactive now, or the contact doesn't work there anymore. There was a lot of back and forth before the quote could be approved," explained Wesley.

To add to the woes of Zhero's Sales team, the software didn't offer automated templating functionality, so each product line would have to be input manually. "When I started at Zhero, they were still using the old quoting software, and it literally took half a day to do a proposal," Anri recalled.



By contrast, Zoho Creator offers a great capacity for templated information. Within the quote generator, dropdown boxes are prepopulated with hardware items, each option with a related list of subcategory items. In a few clicks, Zhero Wait creates a detailed, highly personalised quote. "We can define what our products are in Creator and then it makes it very easy for the salesperson to just choose what goes into the estimate based on the structure that we've set," said Izak.

Since producing quotes inside Zhero Wait, the team has seen reduced errors and improved client confidence whilst saving significant time. "Now they're able to do complex quotes within an hour," Anri confirmed.

Once a quote is completed in Zhero Wait, it's emailed to the client for review. Upon signed acceptance, an invoice is then automatically sent to Zhero's finance department, and a workflow inside the application marks the deal as "won," before raising a purchase order. A separate ticket is also generated for the projects team, notifying them that hardware is due for setup—and thanks to a set of built-in workflows, the ordering and delivery process is straightforward and streamlined. When hardware orders arrive at the admin office, the team can easily log quantities received and close the ticket or leave items on backorder. Users are also prompted to capture any device-specific serial numbers or licence numbers before printing identification labels for each device.

"In terms of automation, labels are printed directly from Zhero Wait, and these get populated with the device or product information. Because the printer is in sync with Zhero Wait, it's a big time-saver. In the past, we were using an Excel file and a wall chart. People would make multiple copies of the spreadsheets and rename them, so it was very difficult to keep track. Everything's streamlined now and automated in terms of processing deliveries and dispatches." - Wesley Harris, Head of Development, Zhero

Knowledge is power

Before building Zhero Wait, Izak was concerned about the leak of expertise from the business through employee attrition. He was also committed to offering a personalised experience to every client in their time of need, despite the fact that Zhero has a substantial catalogue of clients, each operating bespoke IT systems.

To this end, Zhero's development team built a Knowledge Base module that documents each client's infrastructure. This empowers the team to make rapid assessments for every ticket raised, regardless of which engineer last worked with the client.

"What makes this super powerful is that a client can call our service desk, and let's say they require support on a system that's unique to them; the engineer is now able to open the Knowledge Base and have all the information they need to assist the client within a couple of minutes," explained Anri. "Yes, and it's making sure that we keep the intellectual property in the company," added Wesley.

Creator for employee management

Another integral aspect of the software is the HR module. Operating a multi-country business model between the UK, South Africa, and Zimbabwe, Zhero needed a centralised space where absences and holidays could be logged for complete visibility.

A daily leave calendar is hosted inside the app and shared via an automated company-wide email each morning, documenting engineer availability. With client tickets being highly time-sensitive, this process helps identify support requests that need to be reassigned to another engineer, ensuring uninterrupted service.

Moving forward with Creator

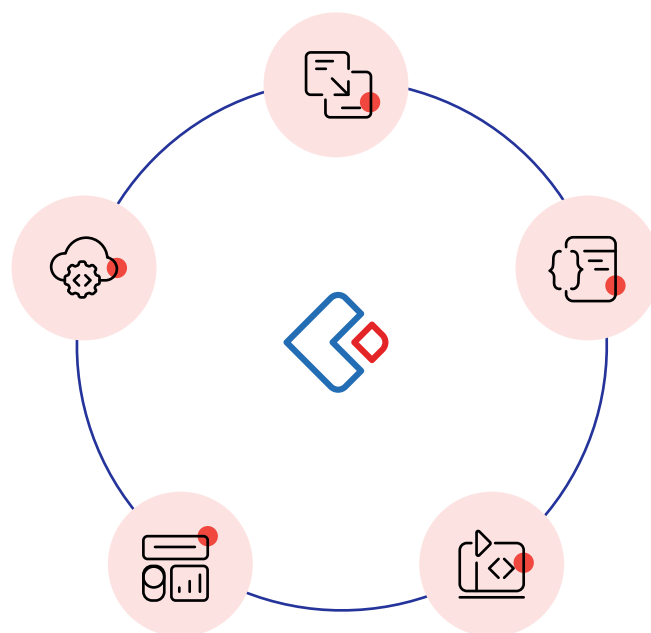
Zhero has enjoyed designing and building a truly bespoke application using the Creator platform. From Izak's visionary plans to Wesley's inspired implementation, the team aren't just happy to have realised a transformative application but have relished the process along the way.

From small touches—"by white-labelling the application and making it all Zhero, it builds advocacy," said Anri—to game-changing elements—"the quoting system was a very big journey, really fun for me to develop," added Wesley—the in-house team have truly brought the Zhero Wait application to life.

Reflecting on the significance of the build, Wesley explained: "It was all about connecting the different departments. From the service desk and projects teams to our finance department, they all need the same information. We've built our system to facilitate all those departments and read the same data—and Zoho Creator let us do that. This centralisation of information has been paramount. The ease of process, too!"

Zhero doesn't plan to stop there. The development team has its sights set on a recurring billing functionality, job-type client portal, and analytics and payroll integrations. With Zhero Wait, the final goal is to have no random processes and eliminate disconnected documents and spreadsheets. Technology will not lead Zhero. Instead, it will follow its requirements. With its innovative solutions, Zhero Wait promises to be a one-stop shop for IT support success.

About Zoho Creator:



Zoho Creator is a low-code application development platform that allows users to create custom applications on their own, with minimal coding experience. The intuitive drag-and-drop interface empowers developers and business users to build web and mobile applications that satisfy all their unique requirements with ease.

Please find out more via our website:

<https://www.zoho.com/creator>.



[zoho.com](https://www.zoho.com)



<https://www.zoho.com/creator/>

Zhero website

<https://www.zhero.co.uk/>

Email us:

sales@zohocorp.com

Contact us:

+44 (0)203 564 7890