Solryza: Business Productivity & Technical Infrastructure

Starting in April 2019, Artic Consulting began an engagement with **Solryza**, a startup company in the field of protein powder product development, importation and reselling to food companies.

As a startup, Solryza needed help with technical infrastructure and process definition across their business, including areas such as email, document storage, and sales team processes.

After senior management discussions between the two companies, Artic began to help Solryza with the following items:

- Improvements to Solryza's Office 365 installation which was purchased through GoDaddy
- Setting up a new SharePoint portal with departmental areas, version control, and approval processes to handle sensitive company documents and those which require a multi-step approval workflow.
- Improving and documenting the Solryza Sales process including sales stages, sales funnel diagrams and improving the existing CRM solution (Zoho CRM) to reflect the new sales stages.

Our project began in earnest when the senior resource for Artic's **Business Management Services** practice arrived onsite at the Solryza headquarters in Montclair, California and was actively supported by other Artic team members via Microsoft Teams. Artic quickly began digging into the current landscape and processes by interviewing all employees and reviewing the current technical infrastructure configuration.

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> I recommend companies and people who treat you like a partner. That's what Artic does. They provided excellent communication through our whole process. I'd highly recommend them.
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> **Chris Quevedo**
> CEO & Founder

Office 365 Migration

After discussions with Solryza management, it was quickly determined that using the version of Office 365 purchased via GoDaddy was not optimal for Solryza's future needs and migrating the company to a Microsoft-purchased full version of Office 365 Business Premium was desired.

The Artic team worked closely with both Microsoft and GoDaddy support resources to plan and execute the migration. Artic's recent expertise with setting up our own Office 365 was invaluable here to ensure that all the bases were covered during the migration. Artic worked with Solryza's employees to individually backup and save their existing emails and contacts, and any other documents they had stored in SharePoint or OneDrive. Artic set up a new Office 365 trial tenant and pointed the email MX records to a temporary location so that no emails were lost. We configured the new tenant to

be able to handle all current employee's email accounts, set up Office 365 groups for all departments at Solryza, and (after some coordination with GoDaddy Support) released the Solryza domain from the older tenant and associated it with the new one. Artic provided white glove support to all Solryza employees to ensure their new email accounts got up and running quickly on their laptops, and older emails and contacts were safely imported from the backups previously made. No emails were lost and only a handful were delayed delivery as a result of this procedure. We could also have done this activity over a weekend to ensure that no downtime happened during business hours, but the Solryza management was eager to get this done immediately.

SharePoint Portal Setup, Customization and Training

Artic set up a new SharePoint portal site for Solryza, including areas to store important company documents such as Safety and HR trainings. This also included customizing the design and color schemes used to match Solryza's company branding. The Artic team also set up departmental sites for Sales, Operations, Product Development, R&D and other areas, so each job function at Solryza would have a place to store their documents and capability for different organization and workflows that each department might have.

After these areas were set up, Artic configured Solryza's SharePoint portal to have a main navigation bar across the top of the portal, which using a new Hub Site feature of SharePoint, the departmental sites could also easily inherit from the main site, without writing or maintaining any code or administration configurations (unlike previous SharePoint versions). The navigation can be easily changed by Solryza to accommodate new or renamed departments in the future. Delivering these improvements gave Solryza a great deal of confidence in their company's structure and that they would be able to communicate effectively across departments.

Artic also worked closely with Solryza employees to set up their knowledge management solution which included importing and uploading all key documents into the correct locations, and training the employees on where future documents should go so they can be easily found.   Having a well-defined content management system for internal documents is a key way to enable multi-user collaboration. Artic conducted multiple training sessions, including a formal recorded session, to go over all aspects of the Solryza SharePoint site, as well as the features of SharePoint and Word/Excel themselves, to educate the Solryza team on how best to make use of SharePoint and Microsoft Office applications to collaborate on documents together.

Enhancements to Sales Funnel & Processes + Customization of CRM Solution

Solryza had just brought aboard a senior Sales employee and was integrating that person into their existing (embryonic) Sales processes. Artic's Business Management Services resource facilitated a valuable discussion with the Solryza management & Sales team to discuss their Sales processes and ideal Sales workflow, including how to track and service leads, accounts, and deal opportunities. The Artic team documented the outcome of this conversation and created a comprehensive Sales Funnel process diagram which visually showed how new opportunities would flow through the Solryza departments, from the beginning of identifying a potential customer (a Lead) all the way through to a confirmed sale (a Win). In the course of discussing this process and reviewing the diagram, Solryza management was able to make some optimizations to their overall processes to reduce manual steps and eliminate risks & potential for human error.

Once the Sales process was agreed upon, the Artic team customized the existing Zoho CRM installation used by Solryza to include the deal stages and other custom fields for rating and ranking leads, accounts, and deal opportunities. In the course of using the CRM tool, Solryza employees had unwittingly created some duplicate records when more than one person had had discussions with a potential customer. Artic was able to analyze the entire CRM dataset, locate duplicate records, and have thoughtful conversations with the Solryza team on how to cleanup the data and eliminate duplicate records in the future.

Finally, Artic worked with Solryza management to identify the Key Performance Indicators (KPIs) which would be used to track the progress and performance of the sales efforts. Artic reviewed all the existing (out of the box) reports in Zoho to identify the best ones to monitor the KPIs and other sales activity. Artic took the initiative to also create some new reports using the Zoho report builder and some dashboards using the Zoho Analytics tool, and trained Solryza management on how to access and update these reports. Creating new reports by Solryza management using the Zoho report builder was also covered in a recorded training session.

Next Steps We Discussed

Solryza was very pleased with the outcomes of the project and provided positive feedback to Artic management on how this project went. We also quickly began discussions for additional work to further assist with the automation and management of Solryza's internal processes and applications.

Other potential areas were also discussed with Solryza including improvements to their website to create a customer portal, improvements to their inventory workflow and physical handling procedures, and automation and application of technology to improve manual processes, all part of future phases.