



INSZOOM

ZoomExpert

Elevate your business with INSZoom



You made the right choice & investment in choosing INSZoom as your technology partner!

- It has increased your efficiency & reduced some of your costs
- It gave you a competitive edge and more business

You've done a great job using INSZoom, here is more on what we can offer!





INSZoom creates
Modules & Features
for your success!



Zoomi Bot

e-Consent

Document Management

Email Calendar Sync

Unlimited Storage

Stakeholder Portals

Broadcast Module



Case Request Module

Forms Management

Billing Module

Letter Management

Headquarter Module

**Multi-Factor
Authentication(MFA)**

Integrations

Single Sign-On

Reports



ZoomExpert
is here!



For Efficiency

- ZoomeeBot
- Integrations
 - QuickBooks
 - DocuSign
 - Payment Gateway
 - HRMS Systems
- Questionnaires & Templates
- Email Calendar Sync

For Customer Satisfaction

- Stakeholder Portals

For Data Privacy

- E-consent
- Multi-Factor Authentication
- One Time Password
- Single Sign-On

For Growth

- Reports
- Prospect Module
- Billing Module
- Broadcast Module



For Efficiency

- **ZoomeeBot** (*INSZoom's virtual assistant bot*)
 - Set up ZoomeeBot for your firm to automate various skills. e.g: read & update government notices
- **Integrations**
 - Set up online payment processing
 - Set up DocuSign for your firm
- **Set up letter & email templates**
- **Petition Templates** (H-1B, L1, I-130 etc.)
 - Add/create, edit, manage, update (forms, questionnaires, document checklists, Process Modules, emails, letters, steps/reminders, events/automation, case managers, starter kit)
- **Email Calendar Sync**
 - Set up Email and Calendar Sync for your staff and train them



For Customer Satisfaction

- Stakeholder Portals
 - Set up Foreign National Portal (FNP) and Human Resources Portal (HRP) end-to-end
 - Train your staff on portals
 - Prepare adoption and training material for your corporate customers
 - Configure Headquarter Module for your corporate customers
 - Set up Case Request (Case Initiation) module for your corporate customers



For Data Privacy

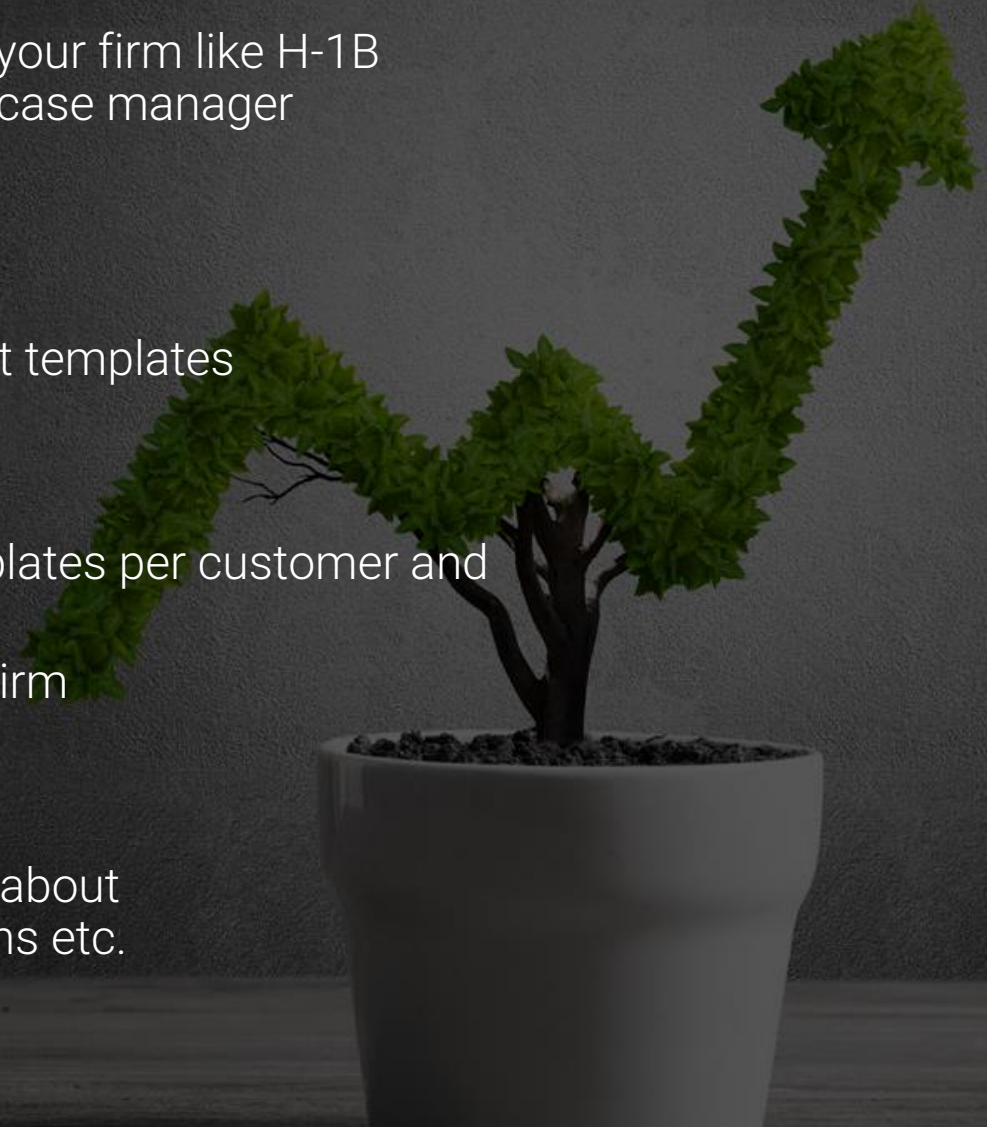


- **E-consent**
 - Configure e-Consent for GDPR & CCPA
 - Customized e-Consent templates based on your firm's requirements
- **Multi-Factor Authentication (MFA)**
 - Configure MFA for your firm and corporate clients
- **One Time Password (OTP)**
 - Set up OTP feature for your firm and corporate clients
- **Single Sign-On (SSO)**
 - Set up SSO for your firm and corporate clients



For Growth

- **Reports**
 - Set up relevant dashboards and reports for your firm like H-1B expiration, cases not invoiced, priority date, case manager productivity report etc.
- **Prospect Module**
 - Set up module with customized intake sheet templates
- **Billing Module**
 - Set up Billing Module including invoice templates per customer and petition type, payment plans etc.
 - Set up online payment processing for your firm
- **Broadcast Email Module**
 - Set up Broadcast Module to email FNs/ HR about visa/petition/important document expirations etc.





ZoomExpert

*An extension of your
firm's staff!* 

- Is INSZoom Core-Module & Advanced-Module certified
- Frees up your staff from technology automation
- Your certified go-to person for INSZoom
- Implements '*INSZoom + your firm's*' best practices
- Configures templates, modules, portals etc.
- Implements ZoomeeBot for your firm
- Trains your staff on INSZoom and its processes
- Helps with on and off boarding of your staff



Here is how ZoomExpert will get you started -

1. Initial discovery with you and your staff
2. Analyze usage of INSZoom
3. Analyze firm data in Excel sheets, Drop Box/Box.com and other sources
4. Propose roadmap based on INSZoom best practices
5. Prioritize the roadmap with you
6. Implement roadmap with agreed delivery dates



ZoomExpert
is not
Product
Support



Your Business Goals	ZoomExpert	Product Support
Extension of your staff	✓	✗
Billing Module		
	✓	✓
• Process Training		
• Configure Billing Module	✓	✗
HR Portal		
	✓	✓
• Process Training		
• Configure HR Portal	✓	✗
Records Management with Zoomeebot		
	✓	✗
• Document/Notices Handling		
• Implementation	✓	✗
Staff Training		
	✓	✓
• Basic Application Skills		
• Case Management	✓	✗
• Case Closures	✓	✗





🕊️ You ask and
ZoomExpert
shall deliver!

