

Enhancing Jewellery Business Management Through Zoho CRM

CUSTOMER OVERVIEW

Milo Jewels is a Mumbai-based jewellery business with approximately 10 employees. The company previously relied on Excel spreadsheets to manage customer information and leads generated through various sources. To improve database management, streamline lead handling, and establish better coordination between business applications, Milo Jewels implemented Zoho CRM with GATI ERP integration.

Locations
Mumbai, India

Industry
Jewellery

Application Replaced
Excel Spreadsheets

Product Implemented
Zoho CRM

Project
CRM Implementation

Employee Count
100

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BUSINESS CHALLENGES

1. Fragmented Customer Database: Maintaining customer information across multiple Excel spreadsheets created challenges in organising, updating, and accessing business records efficiently.

2. Multiple Lead Source Management: Managing enquiries from different lead generation channels required a centralised approach to consolidate, organise, and maintain lead information.

3. Inefficient Lead Tracking: Spreadsheet-based lead management made it challenging to maintain consistent records, monitor lead information, and ensure better visibility across customer enquiries.

4. Disconnected Business Systems: The absence of CRM and ERP connectivity created a need for integration between Zoho CRM and GATI ERP to establish a more connected business environment.

5. Data Accessibility & Management: Managing customer databases and lead information across separate records highlighted the need for a unified platform with better data accessibility and organisation.

6. Limited Operational Coordination: Managing customer information, incoming leads, and business data through separate systems created a requirement for streamlined information management and improved coordination across business processes.



SOLUTION IMPLEMENTED

AGSuite Technologies implemented Zoho CRM to establish a centralised customer and lead management ecosystem, integrating multiple lead sources and GATI ERP to improve data connectivity and streamline business operations.



1. Centralised CRM Database: Implemented Zoho CRM as a unified platform to maintain customer records, organise business information, and replace spreadsheet-based database management.

2. Multiple Lead Source Integration: Consolidated incoming leads from different sources into Zoho CRM, enabling centralised lead collection, organisation, and management.

3. Structured Lead Management: Established an organised CRM-based approach to maintain lead records, improve lead visibility, and streamline the handling of incoming business enquiries.

4. GATI ERP Integration: Integrated Zoho CRM with GATI ERP to establish connectivity between the CRM and existing ERP environment, supporting better coordination between business applications.

5. Unified Information Management: Brought customer databases and lead-related information into a common platform, making business information more accessible and easier to manage.

6. Improved CRM Operations: Configured the CRM environment around the organisation's database and lead management requirements, providing a structured approach to managing customer relationships.

BUSINESS IMPACT/KEY BENEFITS

- **Centralised Customer Database:** Consolidated customer information into a unified CRM platform.
- **Improved Lead Visibility:** Brought leads from multiple sources into one system.
- **Structured Lead Management:** Established a more organised approach to managing business enquiries.
- **Connected Business Applications:** Integrated Zoho CRM with GATI ERP.
- **Better Information Accessibility:** Improved the organisation and accessibility of customer and lead records.
- **Reduced Spreadsheet Dependency:** Transitioned from Excel-based processes to a dedicated CRM platform.

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WHY AGSUITE TECHNOLOGIES

AGSuite Technologies delivered a tailored Zoho CRM implementation aligned with Milo Jewels' customer database, lead management, and business integration requirements. By bringing multiple lead sources into a centralised CRM platform and integrating it with GATI ERP, AGSuite established a connected business environment. The solution focused on improving data organisation, streamlining lead management, and enabling better coordination between business applications through a unified platform.

CONCLUSION

The Zoho CRM implementation enabled Milo Jewels to transition from spreadsheet-based data management to a more structured and centralised CRM environment. With consolidated customer information, multiple lead source integration, and connectivity with GATI ERP, the business gained a unified platform for managing customer databases and lead operations. This implementation established a stronger foundation for organised information management, improved lead visibility, and better coordination across business systems.

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