

Transforming Sales Operations with Centralised Lead Management & Region-Wise Reporting Using Zoho CRM

CUSTOMER OVERVIEW

Worldpack Automation Systems Pvt. Ltd. is a Mumbai-based manufacturing company with approximately 250 employees. The company was previously using Salesforce to manage its sales operations and customer information. To improve lead management, streamline sales processes, and gain better visibility into region-wise product performance, the company partnered with AGSuite Technologies to implement Zoho CRM.

Locations
Mumba i, India

Industry
Manufacturing

Application Replaced
Salesforce

Product Implemented
Zoho CRM

Project
CRM Implementation with IndiaMART, TradeIndia, Website Forms, Google Ads, and WhatsApp Business API Integration

Employee Count
250

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BUSINESS CHALLENGES

The company required a more structured approach to managing its sales activities, lead information, and regional business performance.

1. Fragmented Lead Database Management
Managing leads received from different sources was a key challenge. The company required a centralised database to consolidate lead information and maintain organised customer records.

2. Lack of Centralised Lead-Source Tracking
The company needed better visibility into leads generated through different sources. Managing and analysing source-wise lead information was important for understanding lead generation activities.

3. Limited Region-Wise Reporting
The company required region-wise reporting to monitor sales performance and gain better visibility into product-related business activities across different regions.

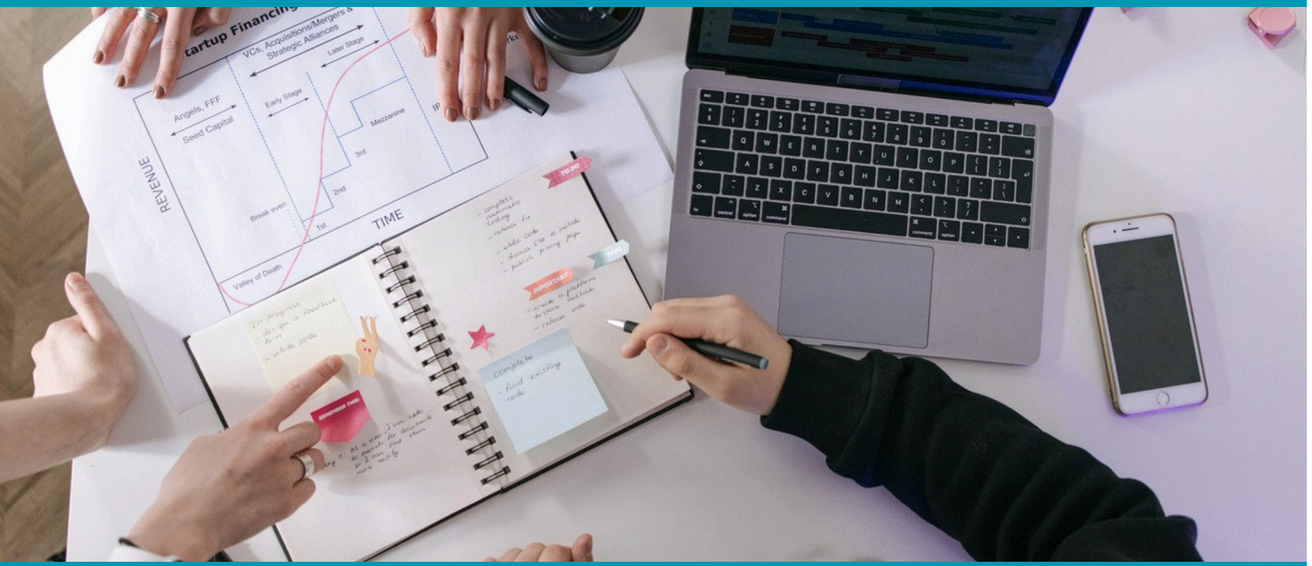
4. Need for End-to-End Sales Management
The company required a structured system to manage the complete sales process, ensuring better tracking of customer enquiries, sales opportunities, and deal progression.



SOLUTION IMPLEMENTED

AGSuite Technologies implemented Zoho CRM to streamline sales operations and establish a centralised environment for lead and sales management.

The solution was designed around the company's requirements for database management, lead-source tracking, regional reporting, and complete sales lifecycle management.



1. Centralised Lead & Database Management

Implemented a centralised CRM database to organise and manage lead information.

- Consolidated lead information from multiple sources.
- Structured lead database management.
- Improved accessibility of lead and customer records.
- Organised lead information for sales teams.

2. Lead-Source Management

Established better visibility into lead-generation channels and source-wise lead information.

- Integrated IndiaMART, TradeIndia, website forms, Google Ads, and WhatsApp Business API with Zoho CRM.
- Organised source-wise lead information.
- Improved visibility into lead generation activities.

3. Region-Wise & Product-Wise Reporting

Introduced reporting capabilities to support regional and product-related sales analysis.

- Region-wise sales reporting.
- Product-wise sales visibility.
- Structured sales data analysis.
- Better visibility into regional business activities.

4. End-to-End Sales Management

Implemented a structured CRM environment to manage sales activities throughout the sales lifecycle.

- Lead and customer management.
- Sales opportunity tracking.
- Deal pipeline management.
- Improved visibility into sales progression.

BUSINESS IMPACT/KEY BENEFITS

1. Centralised Lead Database
Consolidated lead information from different sources into a common CRM platform, supporting organised database management.

2. Improved Lead-Source Visibility
Enabled structured tracking of leads based on their originating sources, helping provide better visibility into lead generation activities.

3. Region-Wise Sales Insights
Established reporting capabilities to view product-related sales information across different regions.

4. Structured Sales Pipeline Management
Introduced a systematic approach to managing sales opportunities and monitoring deal progression.

5. End-to-End Sales Visibility
Brought lead management, customer information, opportunity tracking, and sales reporting together within Zoho CRM.

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WHY AGSUITE TECHNOLOGIES

AGSuite Technologies helped Worldpack Automation Systems Pvt. Ltd. transition from Salesforce to Zoho CRM through a business-focused implementation approach.

- Understanding business-specific sales requirements and workflows.
- Mapping existing sales processes with Zoho CRM capabilities.
- Implementing structured lead and deal management processes.
- Configuring reports and dashboards to improve business visibility.
- Providing a unified CRM environment to streamline sales operations.

CONCLUSION

With the implementationof Zoho CRM, Worldpack Automation Systems Pvt. Ltd. established a centralised platform for managing leads, tracking sales activities, and monitoring region-wise product performance.

The solution helped address key limitations in its previous sales management environment by bringing lead management, sales tracking, and reporting capabilities together within a unified CRM platform. AGSuite Technologies supported the company's transition towards a more organised and structured sales management process.

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