



EVA Software Solutions



Successful Zoho CRM Implementation For Water pump supplier

1. Client Overview

The client operates as a distributor and supplier of submersible pumps, managing customer enquiries, quotations, sales activities, and onsite visits. To improve the organization and visibility of its existing CRM processes, EVA Software Solutions enhanced the Zoho CRM environment around key sales and customer management requirements.

The project focused on improving quotation management, sales tracking, enquiry handling, reporting, and field activity management while making the existing CRM process more structured and easier to monitor.

2. Business Challenges

The business required improvements in several areas of its existing CRM process, including:

- Managing quotation approvals in a structured manner.
- Maintaining better visibility of quotation activity.
- Tracking quotation status and ageing.
- Managing customer follow-ups more consistently.
- Tracking daily tasks, calls, and meetings.
- Improving visibility across leads, quotations, and deals.
- Managing sales and service visits.
- Organizing enquiries across different product categories.
- Providing management with consolidated reporting.
- Aligning quotation documents with business requirements.

3. Objectives

The key objectives of the project were to:

1. Improve the quotation management process.
2. Provide better visibility into quotation activity.
3. Strengthen follow-up and daily CRM activities.
4. Improve reporting across leads, quotations, and deals.
5. Introduce structured sales and service visit tracking.
6. Organize product-specific customer enquiries.
7. Improve management-level visibility.
8. Support connectivity between CRM and inventory processes.
9. Customize quotation documentation as required.

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4. Solution Implemented

EVA Software Solutions enhanced the existing Zoho CRM setup to support a more organized sales and quotation management process. The solution included quotation approval, CRM and inventory connectivity, improved dashboards, structured enquiry management, and dedicated tracking for sales and service visits.

The CRM environment was also adjusted to provide better visibility into quotation activity, customer follow-ups, sales progress, and management reporting. Quotation documents were aligned with the required business information.

5. Key Features & Customization

Quotation Management

- Quotation approval workflow
- CRM and inventory connectivity
- Customized quotation format
- Required quotation fields

Sales & Reporting

- Employee-wise quotation visibility
- Quotation status and ageing tracking
- Monthly sales and quotation dashboard
- Management overview dashboard

Enquiry Management

- Structured tracking of different product enquiries
- Customer and deal-level enquiry management
- Improved visibility across the sales process

Visit Management

- Sales visit tracking
- Service visit tracking
- Visit reporting and visibility

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CRM Activity Management

- Follow-up management
- Task, call, and meeting tracking
- Remarks and notes
- Email templates for CRM activities

6. Results & Benefits

The enhanced Zoho CRM environment provided a more structured approach to managing sales and customer-related activities.

Key benefits included:

- Better control over quotation activities.
- Improved visibility into quotation status and ageing.
- More organized follow-up management.
- Easier tracking of leads, quotations, and deals.
- Structured management of sales and service visits.
- Better organization of product-related enquiries.
- Improved management-level visibility through dashboards.
- More consistent CRM usage across daily sales activities.
- Quotation documentation better aligned with business requirements.

7. Conclusion

The Zoho CRM implementation created a more organized framework for managing quotations, enquiries, follow-ups, sales activities, and field visits. The solution was aligned with the existing business process while introducing improved visibility and control across key CRM activities.

With structured workflows, dashboards, visit tracking, and improved enquiry management, the CRM now provides a clearer view of ongoing sales activities and supports more consistent day-to-day process management.

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