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Case Study: Successful Zoho Bigin Implementation for Gurshabad

1. Client Overview

Gurshabad is a professional language localization and language services organization offering services such as translation, transcription, interpretation, subtitling, dubbing, content creation, language training, and dialect coaching. The company works across Indian and international languages and serves clients across corporate, legal, media, technical, government, education, and other domains. (Gurshabad)

EVA Software Solutions implemented and refined **Zoho Bigin** for Gurshabad with a focus on improving pipeline visibility, user access, duplicate-data control, automated follow-ups, deal notifications, and workflow management. The engagement also included resolving email functionality and pipeline-record mismatches and implementing subsequent workflow changes based on the client's operational requirements.

2. Business Challenges

Gurshabad required a more structured and controlled way to manage its sales pipeline and coordinate deal activity across different users and responsibilities. The implementation requirements focused particularly on visibility, automation, data quality, and workflow-based communication.

Key challenges included:

- Limited filtering options when reviewing pipeline records
- Risk of duplicate contact and company entries
- Requirement to control duplicate creation through an on-screen prompt
- Need to provide junior-level team members with appropriate deal visibility based on multiple user roles
- Requirement for automated follow-up emails from the original lead owner after costing was sent
- Need for the project coordinator to be notified immediately when a deal was created
- Requirement for the project coordinator to view and track deals throughout their progress rather than only after closure
- Email functionality issues affecting the CRM process
- Mismatch in pipeline records requiring investigation and correction
- Need to modify existing workflows and introduce a new workflow for a specific user

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3. Objectives

The Bigin implementation and subsequent configuration work were aimed at:

- Improve pipeline filtering and record visibility
- Prevent duplicate contact and company records
- Provide appropriate deal visibility according to user roles
- Automate follow-up communication after costing is sent
- Ensure follow-up emails originate from the original lead owner
- Notify the project coordinator immediately when a new deal is created
- Allow the project coordinator to track deals throughout the pipeline
- Resolve email-related functionality issues
- Correct pipeline-record mismatches
- Update existing workflows to accommodate the client's revised process requirements

4. Solution Implemented

EVA Software Solutions configured **Zoho Bigin** around Gurshabad's pipeline and user-management requirements. Pipeline filtering was enhanced to provide multiple filtering options, while duplicate-prevention controls were configured for contact and company records so that users receive a prompt when attempting to create duplicate entries.

The deal-visibility structure was addressed to support junior-level users working under multiple roles. Workflow automation was also configured to send follow-up emails from the original lead owner after costing was sent. A separate notification workflow was implemented so that the project coordinator is informed as soon as a deal is created and can view and monitor the deal during its progression.

EVA also resolved the reported email issue and pipeline-record mismatch. Following these corrections, existing workflows were modified to incorporate a new stage, the project manager email was removed where required, and an additional workflow was created for the user.

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5. Key Features & Customization

Pipeline Management & Filtering

- Multiple filtering options for pipeline review
- Improved ability to locate and review relevant pipeline records
- Pipeline workflow updated with a new stage
- Pipeline-record mismatch investigated and resolved

Duplicate Data Control

- Duplicate prevention for contacts
- Duplicate prevention for companies
- Prompt-based handling when duplicate entries are attempted

User Roles & Deal Visibility

- Deal visibility configured for junior-level team members
- Access aligned with multiple user roles
- Project coordinator visibility established from deal creation through progression

Workflow Automation

- Automated follow-up email after costing is sent
- Follow-up communication linked to the original lead owner
- Immediate project coordinator notification when a deal is created
- New workflow configured for the user

Email & Process Corrections

- Email functionality issue resolved
- Project manager email removed from the relevant workflow
- Existing workflows modified to accommodate the revised process

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6. Results & Benefits

The completed Bigin implementation and subsequent changes provided Gurshabad with a more structured pipeline-management environment.

Key outcomes included:

- Better pipeline record filtering and visibility
- Improved control over duplicate contact and company records
- More appropriate deal visibility across different user roles
- Automated follow-up communication after costing
- Follow-ups maintained under the original lead owner's communication flow
- Earlier involvement of the project coordinator through deal-creation notifications
- Better visibility for tracking deals throughout their pipeline journey
- Email functionality restored
- Pipeline-record mismatch resolved
- Updated workflows aligned with the client's revised operating process

No quantitative performance metrics were provided, so the results above are limited to the documented implementation outcomes.

7. Conclusion

The Zoho Bigin implementation for Gurshabad focused on making the CRM pipeline more structured, role-aware, and process-driven. EVA Software Solutions addressed the client's requirements around pipeline filtering, duplicate prevention, deal visibility, automated follow-ups, and project-coordinator involvement.

The implementation was further strengthened through issue resolution and workflow refinements, including the correction of email functionality, resolution of pipeline-record mismatches, addition of a new pipeline stage, removal of the project manager email from the relevant process, and creation of a dedicated workflow for the user.

Overall, the completed work established a Bigin environment better aligned with Gurshabad's day-to-day sales and coordination requirements, while providing a foundation for continued workflow-based process management.

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