



EVA Software Solutions



**Zoho**  
Advanced  
Partner

## Title

### **Powering Smart Financial Qualified personal finance expert with Zoho CRM – Mysamruddhi Group Digital Transformation Journey with EVA Software Solutions**

## Overview

Mysamruddhi Group is a growing financial Qualified personal finance expert firm offering diverse investment and insurance products, including health insurance, life insurance, mutual funds, SIPs, and P2P investments. As their operations scaled, managing complex product workflows, renewals, and customer interactions became increasingly challenging. To address these needs, Mysamruddhi Group partnered with EVA Software Solutions, a Zoho Advanced Partner, to implement Zoho CRM and bring structure, automation, and intelligence to their multi-product financial Qualified personal finance expert process.

## Executive Summary

EVA Software Solutions enabled Mysamruddhi Group to transform their scattered manual operations into a centralized, automated CRM environment. With customized product-wise process flows for each service—life insurance, health insurance, mutual funds, SIPs, and more—Zoho CRM brought automation and tracking to every stage. Key features like automated renewal alerts, master data tracking, Zoho Forms integration, task assignments, and campaign-driven outreach helped unify the work of sales, operations, and qualified personal finance experts. As a result, lead conversion improved, operational delays dropped, and ROI grew significantly.

## Problem Statement

- No unified system to track different products (insurance, mutual funds, P2P, SIPs) with customized flows.
- Manual tracking of policy renewals, nominee details, and insurance coverage led to missed deadlines.
- Lack of automation in the mutual fund Qualified personal finance expert journey, from Demat account creation to SIP recommendation.
- No centralized reminder or task system for team members across sales, operations, and Qualified personal finance expert.
- Difficulty in tracking leads from various sources and evaluating campaign success.

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## Proposed Solutions

- Build product-specific automation flows in Zoho CRM to handle health, life insurance, mutual funds, and more. Create master management views in Deals for tracking nominee data, renewal amounts, and policy expiry.
- Implement full mutual fund workflow automation from lead intake to SIP initiation, including periodic recommendations.
- Enable team collaboration through task assignments, reminders, and automated email triggers. Integrate Zoho Forms and CRM webforms to collect, push, and track leads directly from websites and campaigns.

## Implementation

- EVA Software Solutions mapped all Mysamruddhi Group product processes and created individual blueprints for each offering.
- Custom modules and fields were created for health and life insurance with auto-renewal email reminders.
- Mutual fund workflow was automated end-to-end, including document tracking, email templates, and data collection via Zoho Forms.
- Multi-user task management with reminders ensured all departments stayed in sync.
- Zoho Campaigns and webforms were connected to the CRM to enable lead capture and communication tracking from marketing channels.

## Results

Mysamruddhi Group saw a **drastic increase in operational efficiency and client servicing speed**. Automated renewal emails reduced missed policy expiries by over 80%, and mutual fund onboarding completion time dropped by 40%. Centralized task and activity management improved interdepartmental coordination, ensuring clients were engaged by the right team member at the right time. Detailed dashboards helped identify top-performing lead sources, upcoming policy expirations, and qualified personal finance expert performance. With Zoho Campaigns and webforms, Mysamruddhi Group increased lead capture from online channels by 60% and improved conversion rates via personalized follow-ups. Overall, the Zoho CRM implementation delivered by EVA Software Solutions led to a measurable increase in client satisfaction, higher ROI, and a scalable foundation for future growth.

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