



Z O H O

# ZOHO CRM Implementation for Pharmaceutical Industry





# Client Profile

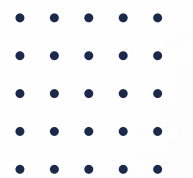
Our Client is a rapidly expanding pharmaceutical distribution company specializing in B2B medicine supply. With a presence in 500+ districts across India, our client is committed to leveraging technology to build a cohesive and efficient distribution network for pharmacies and healthcare providers.

## Industry We Served

Pharmaceutical

## Region

Kolkata, West Bengal, India





# Current Landscape

As the client business grows organically, the client was not using any tool other than Microsoft Excel, or Google Forms, to manage lead distribution among team members and track the status of the same.

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A1 X ✓ f Lead

	A	B	C	D	E
1	Lead Distribution				
2	Lead	Assigned To	Date	State	Status
3	John Doe	Alice	01/18/2024	New	New
4	Jane Smith	Charlie	01/15/2024	Contacted	Contacted
5	Bob Johnson	Eva	01/17/2024	Qualified	Qualified
6	Alice Brown	Bob	01/18/2024	Closed	Qualified
7	Charlie White	Charle	01/19/2024	Draft	New
8	Eva Green	Frank	01/20/2024	New	Closed

Lead Form

Name

Assign to

Alice

Status

New



# Project Background

Tejas Pharma implemented a robust CRM solution to streamline and centralise its sales, communication, and lead management processes. The goal was to enhance team productivity, improve lead assignment, and improve customer engagement across multiple channels.





## The technologies we used

1 Zoho CRM



2 MyOperator



3 Interkart





# Challenges Faced by Our Client



## 1 Manual Lead Management

Our client handled their lead data manually, which led to inefficiencies, lost opportunities, and increased chances of human error.

## 2 Lack of Centralised Communication

They did communication via WhatsApp, phone calls and emails was scattered across different platforms, which makes it difficult for sales teams to track customer interactions and follow-ups effectively.

## 3 No Unified System for Tracking

The client did not have a unified system for tracking leads from web forms, emails or phone calls, leading to missed opportunities and disjointed customer experiences.

## 4 Difficulty in Managing Follow-ups

They do not have any automated system in place, and it becomes challenging for the client to track customer journeys, follow-ups, and the different stages of the sales process, leading to delayed responses and lost leads.





# Solution Proposed



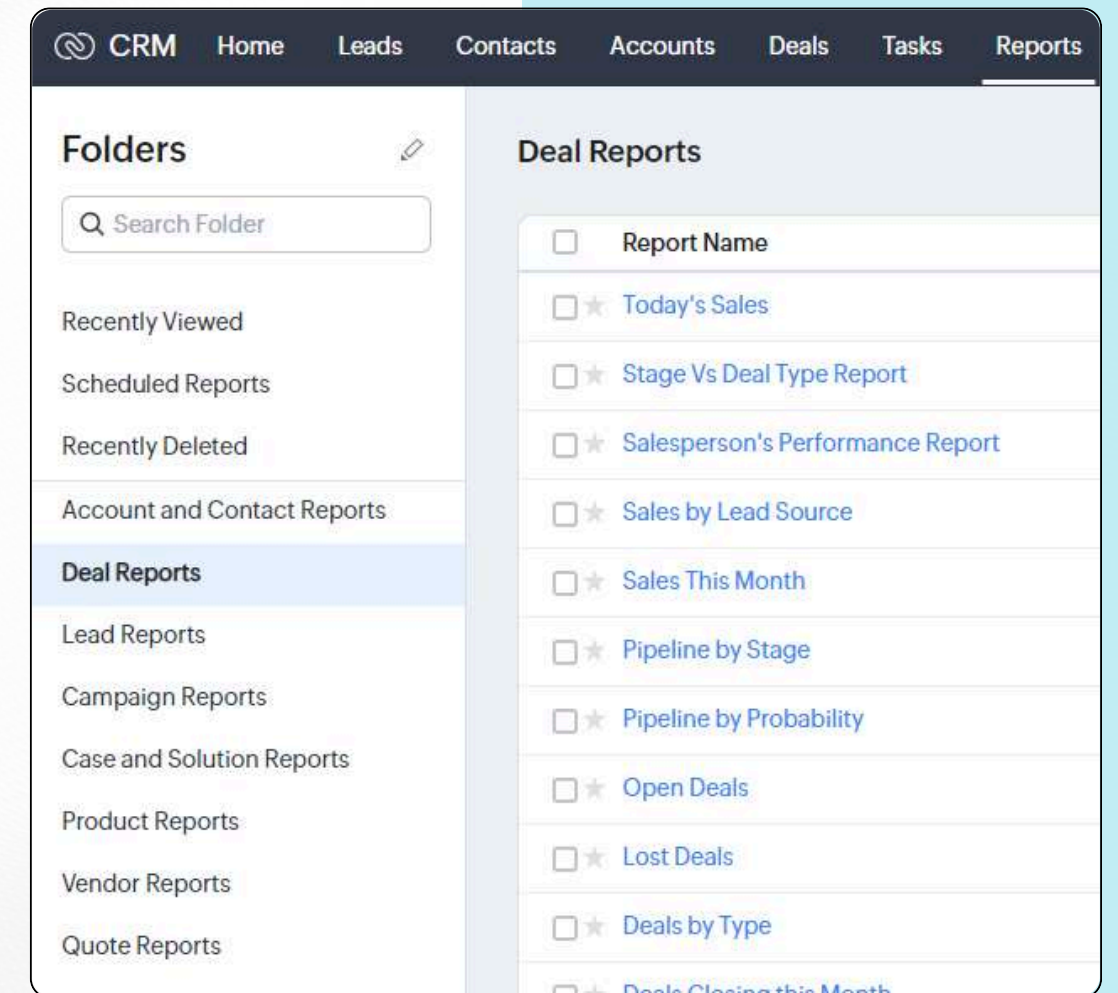
To address these challenges, CRM Master's Infotech team implemented Zoho CRM to centralize communication, automate processes, and streamline lead management. The solution includes the following key components:-

## 01 Zoho CRM Setup and Customization

**Modules Customization:** With the help of CRM, our team customised the modules like Leads, Contacts, Accounts, Deals, and Activities to match the client's sales process and requirements.

**Customized Layouts:** We customized the layouts of each module to ensure that the relevant data fields were easily accessible, reducing the time spent on data entry and ensuring all customer information was visible in a single view.

**Workflow Setup:** With the help of Zoho CRM, we created customized workflows that aligned with the client's sales operations. These workflows automated critical tasks such as lead assignment, follow-up reminders, and status updates, enabling sales reps to focus on building relationships with clients rather than manual data entry.



## 02 Communication and Integration



**Interakt Integration (WhatsApp):** We integrated Interakt (WhatsApp) with Zoho CRM, enabling real-time communication with customers directly through WhatsApp. This allowed for efficient messaging, quicker response times, and seamless tracking of all customer interactions within the CRM system.

**MyOperator Integration (Call Tracking):** Our team integrated MyOperator with Zoho CRM to help call tracking and logging. This integration ensured that every call, whether inbound or outbound, was automatically logged into the CRM, making it easy to track customer interactions and follow-ups.

**Website "Contact Us" Form Integration:** The "Contact Us" form on the client's website was connected to Zoho CRM, enabling automatic capture of leads from the website. This ensured that no lead was missed, and it was instantly stored in the CRM for further processing.

**Email Integration:** The email system was integrated with Zoho CRM to centralize communication. Sales reps could send and track emails directly from the CRM, improving the transparency of communication and allowing for easy follow-up.







## 03 Automation and Templates

**WhatsApp & Email Templates:** We created templates for WhatsApp and email to streamline outreach and ensure consistent communication. These templates allowed the sales team to quickly respond to common queries and requests, reducing response time and ensuring a professional standard of communication.

**Custom Workflows for Lead Progression:** We designed automated workflows to handle lead progression, including status updates and follow-ups. This automation ensured that no lead was forgotten and that sales reps were always aware of the next step in the sales cycle.

## 04 Data Migration

We assisted the client in migrating historical data from Excel spreadsheets into Zoho CRM. This included mapping fields and ensuring that the data was cleaned and properly formatted for easy access and use in the new system. This migration ensured that the client did not lose any important historical information during the transition.





# RESULTS

The implementation of Zoho CRM and the associated integrations brought several key benefits to the client:



## 01. Improved Lead Management

The client now has a centralized system for tracking all leads, ensuring that no lead is lost. Lead data is automatically captured from various sources, including website forms, emails, and phone calls.

## 02. Enhanced Communication

By integrating WhatsApp, call tracking, and email communication into Zoho CRM, the client has streamlined communication across all channels. Sales teams can now engage with customers in real-time via WhatsApp and track every interaction, providing a seamless customer experience.

## 03. Efficient Follow-Ups and Lead Tracking

Custom workflows and automation have drastically reduced the manual effort needed for lead follow-ups. Sales reps receive automated reminders, ensuring that no follow-up is missed, and leads progress smoothly through the sales cycle.





## 04. Better Data Visibility

The customized dashboards and reports in Zoho CRM provide the client with clear insights into the sales pipeline and team performance, enabling better decision-making and resource allocation.

## 05. Faster Response Times

With WhatsApp and email templates, the client can respond to customer inquiries faster, ensuring timely communication and improving customer satisfaction.

## 06. Seamless Integration and Automation

Integrating Zoho CRM with the client's existing systems, such as Interakt for WhatsApp and MyOperator for call tracking, has streamlined operations and reduced the need for manual input, saving time and reducing errors.







# About CRM Masters Info Tech

ENABLING GROWTH THROUGH  
DIGITAL TRANSFORMATION

We are a CRM consultant company focusing on Shopify eCommerce solutions. With over **9 years of experience** and over **2050+ successful projects**, we have a proven track record of helping businesses optimize their workflows and boost growth. Our team of **100+ expert developers** specializes in delivering top-notch eCommerce platforms, CRM integrations, and tailored business solutions to meet our client's needs.





# LET'S TALK & FIND YOUR SOLUTION



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