

Sales Pipeline Management by implementing Zoho Begin for Build Block Company

Alaska

Business Name

Build Block Company

Company Profile

- Industry Manufacturing
- Type B2B
- Location Madhya Pradesh, India

Solution Provided:

- Custom CRM & Workflow Management System (Built on Zoho Begin)

Case Study



Introduction

Infobyd Software Solutions is a rapidly expanding IT organization and a certified Zoho Advanced Partner, recognized for delivering comprehensive business solutions through Zoho's powerful suite of applications. As a trusted digital transformation partner, Infobyd enables organizations to streamline operations, enhance customer engagement, and accelerate business growth through innovative technology solutions.

Case Study

With a deep focus on client success, Infobyd delivers fully customized, end-to-end Zoho implementations across multiple business functions — including Customer Relationship Management (CRM), Finance, Human Resources, Inventory Management, Procurement, and more. Each solution is tailored to the client's unique workflows, ensuring seamless system integration and process optimization.

Beyond solution design and deployment, Infobyd also provides robust Quality Assurance (QA) services, offering both manual and automated testing capabilities. Leveraging Zoho Sprints for structured project and test management, the team ensures efficient test planning, defect tracking, performance validation, and continuous quality enhancement.

To date, Infobyd has successfully delivered 1,750+ projects across diverse industries such as Healthcare, Manufacturing, Education, Solar Energy, Fleet Management, Trading, Information Technology, Print & Publication, Multimedia Advertising, and Financial Services. This broad industry expertise, combined with deep knowledge of the Zoho ecosystem, empowers Infobyd to deliver scalable, reliable, and future-ready solutions that drive measurable impact and long-term success for modern enterprises.



Project Overview

Build Block Company, a manufacturer and supplier of high-quality concrete blocks and precast construction materials, aimed to modernize its sales management and client handling processes. The company previously relied on spreadsheets, manual records, and phone-based coordination to manage inquiries, quotations, and follow-ups. As customer volume increased and sales operations became more complex, the management identified the need for a structured CRM system to efficiently manage leads, deals, and client communication.

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The primary goal was to implement Zoho Bigin, a simplified CRM designed for small and medium-sized teams, to organize leads, automate daily sales activities, and provide management with real-time visibility into the sales pipeline and performance metrics.

This implementation provided a strong digital foundation — centralizing customer data, automating reminders, and offering dashboards and reports that give the management team a complete view of business performance.



Key Takeaways

- **Need Identified:** Build Block Company required a centralized CRM system to manage leads, deals, and customer communication that were previously handled manually.
- **Goal:** Streamline sales processes by introducing automation for lead tracking, follow-ups, and deal management while providing real-time insights to management.
- **Solution Provided:** Implemented a customized Zoho Bigin setup with module configurations for Leads, Deals, and Contacts, automated workflows for followups, and real-time dashboards for monitoring sales performance.
- **Outcome:** Centralized customer data, improved sales coordination, automated task reminders, and enhanced the ability of the sales team to manage and convert leads effectively.
- **Business Impact:** Better sales visibility, faster customer response, improved team collaboration, and a scalable CRM foundation to support future business expansion.



Executive Summary

Build Block Company, a reputed manufacturer and supplier of concrete blocks, recognized the need to modernize its sales management system to improve efficiency,

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lead tracking, and customer engagement. The absence of a centralized CRM solution led to fragmented data, manual follow-ups, and inconsistent tracking of inquiries and deals — which in turn made it difficult for management to monitor performance and identify opportunities.

To address these issues, Infobyd Software Solutions Pvt. Ltd. implemented a customized Zoho Bigin CRM tailored to Build Block Company's sales workflow. The new system provided a unified platform for lead management, deal tracking, and client communication — integrated with automation for reminders, follow-ups, and reporting dashboards.

As a result, Build Block Company has achieved improved operational efficiency, faster lead conversions, and real-time sales visibility. The solution created a digital foundation that supports data-driven decisions, enhanced collaboration, and longterm business scalability.



Problem Statement

Build Block Company faced major challenges in managing sales and customer relationships due to the lack of a centralized system. The company's sales operations — from lead generation and quotations to follow-ups — were handled manually using spreadsheets and phone communication.

This led to fragmented data management, miscommunication between departments, and delays in responding to customer inquiries. As the number of leads grew, tracking progress and maintaining follow-up schedules became increasingly difficult. The absence of automation and structured reporting further limited visibility into sales performance and pipeline health.

Without a unified CRM, management struggled to access accurate, real-time insights into lead sources, deal stages, and overall team performance. This hampered data-driven decision-making and affected productivity.

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To overcome these challenges, Build Block Company needed a CRM system that could centralize lead data, automate follow-ups, improve team coordination, and enhance visibility across the sales process..



Key Challenges

- **Manual Sales Processes:** Reliance on spreadsheets and manual tracking caused data duplication, missed follow-ups, and inefficiencies.
- **Lack of Centralized Visibility:** Management had no real-time insights into deals or salesperson performance.
- **Unorganized Customer Data:** Important lead and deal details were stored in multiple files, leading to fragmented records.
- **No Automation or Reminders:** Without workflow automation, follow-up tasks were often delayed or missed.
- **Scalability Limitations:** Manual systems could not support the growing volume of leads and clients.
- **Poor Reporting:** The absence of dashboards and analytical reports made it difficult to evaluate sales performance or forecast revenue..



Evaluation of the Problem

- **Fragmented Workflows:** Lead tracking, deal updates, and customer communication were handled separately through different tools, creating confusion and data gaps.
- **Time-Consuming Operations:** Repetitive manual tasks slowed down sales cycles and reduced overall team efficiency.

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- **Scalability Constraints:** The manual system could not handle the increasing number of clients and inquiries.
- **Data Inconsistency:** Manual entry errors led to inaccurate records and poor data reliability.
- **Limited Oversight:** Management lacked real-time visibility into sales metrics and team performance, affecting decision-making and accountability.



Proposed Solution

To resolve these challenges, Infobyd implemented a customized Zoho Bigin CRM solution for Build Block Company — tailored specifically to its sales and customer engagement needs.

- 1. Lead & Contact Management:** Centralized database for all leads and customers with complete communication history.
- 2. Deal & Pipeline Tracking:** Automated tracking of deals across stages, providing visibility into progress and revenue forecasts.
- 3. Activity & Task Scheduling:** Follow-up reminders, meeting scheduling, and task notifications to ensure timely engagement.
- 4. Email & Communication Integration:** Unified record of all email and call interactions for better collaboration.
- 5. Performance Dashboard:** Real-time visual insights into sales trends, team performance, and deal conversion rates.
- 6. Automation & Workflow Management:** Lead assignment, follow-up reminders, and deal stage transitions automated to minimize manual work.
- 7. Reports & Analytics:** Detailed insights into lead sources, conversion ratios, and sales performance for better forecasting.

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Implementation

The implementation of the customized Zoho Bigin CRM system for Build Block Company was executed through a phased approach to ensure a smooth transition from manual lead tracking to a fully automated sales management process. Each phase was designed to align with the company's sales workflows, user adoption capability, and organizational goals..

Phase 1: Requirement Gathering & Planning

- Conducted detailed discussions with Ayush Girnar to map the existing sales process and identify bottlenecks..
- Defined project goals, required modules, and implementation timeline.

Phase 2: System Design & Configuration

- Customized modules for Leads, Deals, and Contacts based on Build Block Company' workflow.
- Configured follow-up reminders, email integration, and automation workflows for deal management.

Phase 3: Testing & Validation

- Performed user acceptance testing with real sales data.
- Verified workflow automation, report accuracy, and dashboard performance.

Phase 4: Training & Onboarding

- Conducted hands-on training sessions for sales and management teams..
- Provided documentation and post-launch support for smooth adoption

Phase 5: Go-Live & Monitoring

- Successfully deployed the CRM for live use.
- Monitored system performance and gathered feedback for optimization and scalability.

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Results

Centralized Sales Management: The newly implemented Zoho Bigin CRM system unified all sales functions—including lead capture, deal tracking, client communication, and follow-up management—into a single centralized platform. This eliminated the need for multiple spreadsheets and manual tracking, significantly reducing errors and improving productivity. .

Enhanced Data Accuracy: Automation of lead entry, deal updates, and workflow tracking has improved the accuracy of customer data across all stages of the sales cycle. Consistent data validation and real-time synchronization have minimized duplication and ensured reliable sales reporting.

Improved Visibility & Decision-Making: Management now has complete visibility into sales pipelines, deal progress, and team performance through realtime dashboards and analytics. This transparency has enabled faster, data-driven decision-making and improved resource allocation.

Streamlined Sales Workflow: Integration of lead management, pipeline tracking, follow-up scheduling, and communication history has eliminated workflow bottlenecks. Coordination among sales representatives, team leaders, and management has improved, ensuring timely follow-ups and smoother deal closures.

Faster Response Time & Customer Engagement: Automated reminders and email integrations have shortened response times to customer inquiries, improving engagement and overall satisfaction. Sales teams can now act quickly on new leads and ensure consistent communication throughout the client journey.

Scalable Digital Infrastructure: The Zoho Bigin CRM solution provides a robust and scalable foundation that can easily support future business growth. As Build Block Company expands its client base and sales operations, the system can be customized further to include additional automation, analytics, and integration with other Zoho applications.

Client Testimonial

Alaska

Ayush Girnar

Director | Build Block Company

About ZOHO and INFOBYD

"We at Build Block Company are very happy with the support provided by Infobyd for our Zoho Bigin setup. The team is skilled, supportive, and made the whole process smooth and easy to understand. They were always available to answer our questions on time. We truly appreciate their efforts and teamwork.

Thank you, Infobyd!"



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