

Client Case Study: V AIM Group

V AIM Group - Global Client

Streamlining client management, tracking, and campaign automation through Zoho CRM Plus and Zoho Marketing Automation implementation by GrowBeyond Tech.

Month 1



Tracking



Automation



Management



Analytics



A collaborative project with V AIM Group.

1. V AIM Group case study

Automating Lead-to-Deal and Marketing Operations with Zoho

Zoho CRM Plus (CRM) | Marketing Automation | Social | PageSense | Analytics

2. Overview

V AIM Group engaged GrowBeyond Tech to replace spreadsheet-based sales and marketing tracking with a connected Zoho solution. The implementation focused on:

- Centralizing lead, contact, account and deal information in Zoho CRM Plus.
- Automating lead-to-deal processes through workflows and Blueprint.
- Designing customer journeys and reusable campaign templates in Marketing Automation.
- Connecting Zoho Social, PageSense and Analytics for engagement and performance visibility.

3. Executive Summary

V AIM Group previously relied on spreadsheets to manage leads, sales follow-up, campaign activity and performance tracking. Without a centralized system, the team had limited visibility across the lead-to-deal pipeline and depended on manual updates to coordinate sales and marketing activities.

GrowBeyond Tech implemented Zoho CRM Plus and Marketing Automation, supported by Zoho Social, PageSense, dashboards and Analytics. The engagement covered process discovery, configuration, workflow and Blueprint automation, customer journeys, reporting, testing, training and go-live support.

4. Problem Statement and Key Challenges

1. **Spreadsheet dependency:** Lead and sales information was maintained across spreadsheets without a unified operational tracker.
2. **Lead-to-deal in-visibility:** The team lacked a consistent view of lead progression, follow-up status and deal movement across the sales pipeline.
3. **Manual sales processes:** Lead assignments, follow-ups and stage progression depended on manual actions, increasing the risk of inconsistent execution.
4. **Fragmented marketing execution:** Campaign planning, customer nurturing and social activity were not connected to one structured customer journey.
5. **Limited performance visibility:** Website behavior, campaign engagement and sales performance were difficult to analyze through a single reporting view.

5. Evaluation of the Problem

GrowBeyond Tech conducted process discussions to document the As-Is sales and marketing workflow. The assessment covered lead capture, qualification, follow-up, deal progression, customer journeys, campaign execution, social activity, website engagement and management reporting.

The review confirmed that the requirements could be addressed through Zoho-native capabilities. The design prioritized structured CRM data, workflow and Blueprint controls, connected lead-to-deal stages, automated marketing journeys, digital engagement tracking and consolidated dashboards, reducing dependence on spreadsheet-based trackers.

6. Proposed Solution(s)

1. Zoho CRM Plus lead and pipeline automation

- Configured structured lead, contact, account and deal information for consistent tracking.
- Created workflows for assignment, follow-up, stage updates and sales activity management.
- Implemented Blueprint controls to standardize the lead-to-deal process and required actions.

2. Marketing Automation journeys and campaigns

- Designed end-to-end customer journeys for lead nurturing and engagement.
- Created reusable campaign templates for consistent marketing communication.
- Connected campaign activity with CRM records for better sales and marketing coordination.

3. Zoho Social and PageSense engagement visibility

- Connected social activity with the broader customer engagement process.
- Used PageSense to understand website visitor behavior and engagement patterns.
- Improved visibility into digital interactions that support lead follow-up and campaigns.

4. Dashboards and Zoho Analytics

- Configured dashboards for lead, deal, campaign and pipeline performance visibility.
- Structured analytics around the lead-to-deal funnel and key sales activity indicators.
- Provided management with a more consistent view of sales and marketing performance.

7. Implementation

The solution was implemented through six focused phases:

- Phase 1: Requirements gathering and As-Is process documentation.
- Phase 2: Zoho CRM Plus lead, contact, account and deal configuration.
- Phase 3: Workflow and Blueprint automation for lead-to-deal execution.
- Phase 4: Marketing Automation journeys, campaigns and template configuration.
- Phase 5: Zoho Social, PageSense, dashboards and Analytics configuration.
- Phase 6: UAT, user training, production deployment and handover.

8. Result

1. **Centralized sales operations:** Lead, contact, account and deal information is now maintained in one structured CRM environment.
2. **Standardized lead-to-deal process:** Workflows and Blueprint guide sales activities and stage progression consistently.

3. **Automated customer journeys:** Marketing Automation supports structured nurturing and reusable campaign execution.
4. **Connected digital engagement:** Zoho Social and PageSense provide better visibility into social and website interactions.
5. **Improved performance reporting:** Dashboards and Analytics provide clearer visibility into pipeline, campaigns and sales activity.
6. **Reduced manual effort:** The team has moved away from fragmented spreadsheets to a connected and repeatable workflow.

Implementation Highlight

GrowBeyond Tech replaced spreadsheet-based sales and marketing tracking with a connected Zoho CRM Plus and Marketing Automation workflow, giving V AIM Group one operational view of leads, deals, campaigns and performance.

Connected sales and marketing operations

Client Testimonial

"GrowBeyond Tech helped us replace manual tracking with a connected Zoho environment, improving visibility across our lead-to-deal process, campaigns and performance reporting."

— V AIM Group

Operational outcome tracking

The implementation established a clear before-and-after operating model for the following activities:

Outcome measure	Before implementation	After implementation
Lead and deal tracking	Lead and sales information was maintained in spreadsheets and required manual consolidation.	Zoho CRM Plus now provides centralized lead, contact, account and deal records.
Sales and marketing execution	Follow-ups, stage updates and campaign activities depended on manual coordination.	Workflows, Blueprint and Marketing Automation provide structured sales and nurturing processes.
Reporting and digital insights	Pipeline, campaign and website engagement data was reviewed through disconnected sources.	Dashboards, PageSense and Analytics provide connected performance and engagement visibility.

V AIM Group now has a centralized and automated sales and marketing foundation, with improved lead-to-deal visibility, campaign execution, digital engagement tracking and performance analytics.