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Building Solutions For Growth

CASE STUDY

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Wellness Sports Case Study

Automating Customer, Referral and Package Lifecycle Management with Zoho CRM, Zoho Books & WhatsApp Integration

From spreadsheets to an automated, connected customer management system.



Implementation Time: **3 Weeks**



Customer
Management



Referral
Tracking



Package
Lifecycle



Invoicing &
Accounting



Automated
Notifications



*Stronger People
Healthier Communities
Brighter Tomorrows*



WELLNESS SPORTS INC.
Together we can achieve more with Zoho.

PEOPLE
PROCESSES
POSSIBILITIES



Implemented by
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TOMORROW
TOGETHER



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1. Wellness Sports case study

Automating Client, Referral and Package Lifecycle Management with Zoho

Zoho CRM | Zoho Books | WhatsApp Integration

2. Overview

Wellness Sports engaged GrowBeyond Tech to replace spreadsheet-based tracking with a connected Zoho solution. The implementation focused on:

- Centralizing Client and referral information in Zoho CRM.
- Tracking package purchase dates, validity periods and expiry dates.
- Automating package-expiry reminders and renewal follow-up activities.
- Managing invoices and credit notes through Zoho Books.

3. Executive Summary

Wellness Sports previously managed Client, referral, package and financial information through spreadsheets. Without a centralized tracker, the team had limited visibility into package purchase dates and expiries, making timely reminders and renewals difficult to manage.

GrowBeyond Tech implemented Zoho CRM and Zoho Books, with WhatsApp integration for invoice delivery and service updates. The three-week engagement covered process discovery, configuration, integration, automation, testing, training and go-live.

4. Problem Statement and Key Challenges

1. **Spreadsheet dependency:** Client and package information was maintained across spreadsheets without a unified operational tracker.
2. **Package-expiry invisibility:** The team found it difficult to track purchase dates, validity periods and upcoming expiries consistently.
3. **Manual reminder process:** Package-expiry and renewal reminders depended on individual follow-up, creating the risk of delayed or missed communication.
4. **Disconnected financial handling:** Invoices and credit notes were managed separately from Client and package records.
5. **Fragmented Client communication:** Invoices and service updates could not be sent through one automated WhatsApp-enabled workflow.

5. Evaluation of the Problem

GrowBeyond Tech conducted process discussions to document the As-Is workflow. The assessment covered Client onboarding, referral capture, package purchase, package validity and expiry, renewal follow-up, invoice creation, credit notes and Client communication.





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The review confirmed that the requirements could be addressed through Zoho-native capabilities and a controlled WhatsApp integration. The design prioritized structured CRM fields, linked Client and package records, date-based workflows, Zoho Books integration and reusable message templates, avoiding the need for separate spreadsheet trackers.

6. Proposed Solution(s)

1. Zoho CRM Client and referral management

- Configured structured Client, referral and package information for consistent tracking.
- Linked Client records with package purchase, validity and expiry details.
- Created workflows and follow-up activities for referral and renewal management.

2. Package lifecycle and expiry automation

- Captured package purchase date, start date, expiry date and package status.
- Configured date-based reminders before package expiry.
- Enabled systematic renewal follow-up and service-status updates.

3. Zoho Books invoicing and credit-note management

- Connected Client information between Zoho CRM and Zoho Books.
- Streamlined invoice creation, credit-note handling and financial record visibility.
- Provided a traceable link between Client packages and financial transactions.

4. WhatsApp communication integration

- Enabled invoices and relevant financial documents to be shared with clients through WhatsApp.
- Automated package-expiry reminders and service updates through approved message workflows.
- Improved the speed and consistency of Client communication.

7. Implementation

The solution was implemented within three weeks through six focused phases:

- Phase 1: Requirements gathering and As-Is process documentation.
- Phase 2: Zoho CRM Client, referral and package-field configuration.
- Phase 3: Package-expiry workflows, reminders and renewal follow-up automation.
- Phase 4: Zoho CRM and Zoho Books integration for invoices and credit notes.
- Phase 5: WhatsApp message templates and communication workflow configuration.
- Phase 6: UAT, user training, production deployment and handover.

8. Result

1. **Centralized Client operations:** Client, referral and package information is now maintained in one structured CRM environment.
2. **Reliable expiry tracking:** Package purchase and expiry dates are visible and consistently monitored.





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3. **Automated renewal reminders:** Date-based workflows support timely Client follow-up before package expiry.
4. **Connected financial management:** Zoho Books supports invoice and credit-note processing with improved traceability.
5. **Faster client communication:** Invoices, service updates and package reminders can be delivered through WhatsApp.
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 tracking with a connected Zoho CRM, Zoho Books and WhatsApp-enabled workflow, giving Wellness Sports one operational view of Client, package and financial activity.

Delivered in three weeks

Client Testimonial

"GrowBeyond Tech helped us move from spreadsheet-based tracking to an integrated Zoho CRM and Zoho Books solution. We now have better visibility into Client referrals, package expiries, invoices and credit notes, while automated WhatsApp updates have improved our Client communication."

— Aashish Kusswaha (CEO), Wellness Sports Inc.

Operational outcome tracking

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

Outcome measure	Before implementation	After implementation
Client and referral tracking	Client and referral information was maintained in spreadsheets and required manual consolidation.	Zoho CRM now provides centralized Client, referral and package records.
Package expiry follow-up	Purchase and expiry dates were checked manually, making reminders difficult to manage consistently.	Date-based workflows track package expiry and trigger timely renewal follow-up.
Invoices and credit notes	Financial documents were handled separately from Client and package information.	Zoho Books provides connected invoice and credit-note management with improved traceability.

Wellness Sports now has a centralized and automated Client-management foundation, with improved referral visibility, package-expiry control, financial traceability and consistent WhatsApp communication.

