Project – IZZHAAR

Introduction:

Izzhaar (by Core Designs) is a premier luxury gifting and bespoke invitation brand in India.Headquartered in Gurugram, Haryana, it specializes in personalized hampers, wedding invitations, baby announcements, and corporate gifts, combining traditional Indian artistry with contemporary designs.

Business Name:

Izzhaar

Company Profile:

Industry: Design Services

Location: 773 & 775, Phase 5, Udyog Vihar, Gurugram 122016

Website - https://izzhaar.com

Selection Criteria :

- **Zoho One** – A unified platform to centralize sales, finance, marketing, collaboration, and reporting, enabling seamless data flow and efficient business operations.
- **Zoho CRM** – Implemented to manage the complete sales lifecycle, including lead management, accounts, contacts, and deal tracking, ensuring better customer relationship management and sales visibility.
- **Zoho Books & Zoho Inventory** – Deployed to streamline financial operations, including quotations, invoices, payments, accounting, product management, inventory tracking, and stock control through an integrated system.

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- **Zoho Marketing Automation** – Used to automate marketing campaigns, customer journeys, email communications, lead nurturing, and campaign performance tracking to improve marketing effectiveness.
- **Zoho Cliq** – Introduced as the organization's internal communication platform to facilitate real-time messaging, team collaboration, and faster coordination across departments.
- **User Management** – Configured role-based access, profiles, permissions, and layout-specific visibility to ensure secure access to data and streamlined user experience based on responsibilities.
- **Zoho Analytics** – Implemented to provide interactive dashboards and real-time reports, enabling management to monitor KPIs, sales performance, financial insights, and overall business metrics for informed decision-making.
- **Zoho Mail** – Configured for professional business email communication with seamless integration across Zoho applications, improving productivity and centralized communication.
- **Zoho People and Payroll** – In phase 2, we have started.

Problem Statement:

The client was managing its day-to-day business operations through manual processes resulting in fragmented data and operational inefficiencies. Sales information, customer records, financial transactions, inventory, marketing activities, and internal communication were handled separately, making it difficult to maintain data accuracy, track business performance, and collaborate effectively across departments.

The absence of a centralized system led to duplicate data entry, limited process visibility, delayed reporting, and increased dependency on manual follow-ups. Additionally, the client required role-based access for different teams, integrated reporting for management, and automation to reduce repetitive tasks and improve productivity.

Zoho One was selected as the ideal solution because it provides a unified ecosystem of business applications with seamless integration, enabling the client to centralize operations, automate workflows, improve collaboration, and gain real-time business insights from a single platform.

Solution Offered:

Zoho CRM Implementation

- Required Tasks & Activities for Implementation

Implementation of the following Zoho CRM modules to streamline our sales process:

· **Leads**

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- **Contacts**
- **Accounts**
- **Deals**
- **Quotes**
- **Purchase Orders**
- **Tasks**
- **Meetings**
- **Calls**
- **Products**
- **Reports**
- **Dashboard**

Additionally, the following basic organizational setup must be configured within Zoho CRM:

Company Information: Name, logo, address, and contact details.
Time Zone Configuration
Currency Locale: Essential for financial fields such as Deal Amount and Product Price, Payment reminders info.
Super Admin: A designated user with admin privileges, serving as the point of contact for all billing and subscription communications and MIS.
Business Hours: To determine user availability for automated actions, including workflow triggers, task assignments, and scheduled activities.

Leads Management

Leads will be automatically captured in Zoho CRM from website forms, other sources and a process must be set up for auto assignment(Using Round Robin/Criteria Based) of leads to sales representatives by the admin.

Channel : Social Media(WhatsApp and Instagram / Website / Existing Client / Walk-in
Website & Landing Page Integration

Website Integration – API integration with Website contact us form Automated Lead Capture – Set up the forms to automatically capture and store lead data in Zoho CRM for prompt follow-up.

Form Fields – Include essential fields such as:
Name
Email
Phone Number
Message
Additional Comments

This implementation will enhance lead collection, boost engagement, and facilitate targeted follow-ups.

PIPELINE 1 – LEAD INTAKE, FILTERING & DATA HYGIENE

Raw Lead
Deadline / SLA: Respond within 2 working hours
Purpose: Initial acknowledgement and data capture only.

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Deadline Logic: SLA starts at lead creation; escalates if untouched.
Do’s
• Respond promptly
• Capture correct details
• Create follow-up task
Don’ts
• Delay response
• Assume seriousness
• Leave fields blank
Contact Attempted
Deadline / SLA: 2 attempts within 24 hours
Purpose: Proves sales effort.
Deadline Logic: CRM blocks movement without logs.
Do’s
• Log all calls/messages
• Be professional
• Schedule follow-up
Don’ts
• Fake logs
• Spam client
• Contact late hours
Two-Way Interaction
Deadline / SLA: Complete within 24 hours
Purpose: Confirms genuine conversation.
Deadline Logic: Mandatory fields enforced.
Do’s
• Confirm purpose
• Ask timeline
• Record notes
Don’ts
• Proceed on guess
• Accept vague replies
• Skip documentation
Internal Filtering
Deadline / SLA: Decision within 48 hours
Purpose: Filters junk leads.
Deadline Logic: Disqualification mandatory if not fit.
Do’s
• Be objective
• Disqualify early
• Tag cold leads
Don’ts
• Emotional conversion
• Keep dead leads
• Overpromise
Senior Validation
Deadline / SLA: Approve within 24 hours
Purpose: Final gate before Deal conversion.
Deadline Logic: Conversion rights restricted.
Do’s

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• Apply strict criteria
• Confirm seriousness
• Approve executable leads
Don’ts
• Bypass validation
• Approve unclear leads
• Convert speculation

Contacts & Accounts Management

Lead Conversion Process

- **Lead Conversion Process** – Once leads are converted, their details move to the Contacts/Accounts/Deals module in Zoho CRM. Converted leads will be assigned to owner, ensuring a clear transition of responsibility from sales representatives.

- **Account Management** – The Accounts module will store customer company information, allowing multiple Contacts (individual representatives) to be linked to each Account.

- **Customization Requirements:**

· Rename module tabs for better alignment with business terminology.
· Add and edit custom fields and values to capture specific business data.
· store detailed information about Accounts and Contacts.
· Check-in feature in meetings

- **Outcome:** A structured CRM setup ensuring efficient lead conversion, clear role transitions, and comprehensive account management.

Deals Management

PIPELINE 2 – SALES, PROPOSALS, SAMPLES & CONFIRMATION
Qualified Query
Deadline / SLA: Same day
Purpose: Structured selling begins.
Deadline Logic: Deadline auto-set on conversion.
Do’s
• Complete data
• Assign owner
• Plan next steps
Don’ts
• Move with gaps
• Delay follow-up
• Casual handling
Requirement Deep Dive
Deadline / SLA: Within 1 working day
Purpose: Avoids rework.

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Deadline Logic: CRM blocks next stage if incomplete.
Do’s
• Clarify customization
• Document packaging
• Check compliance
Don’ts
• Rely on verbal
• Skip packaging
• Ignore compliance
Proposal Shared
Deadline / SLA: Within 2 working days
Purpose: Formal commercial offer.
Deadline Logic: Attachment mandatory.
Do’s
• Attach proposal
• Mention validity
• Align expectations
Don’ts
• Verbal quotes
• No attachment
• Casual changes
Sample Design Shared
Deadline / SLA: Within 3 working days
Purpose: Visual confirmation.
Deadline Logic: Auto reminders after 3 days.
Do’s
• Clear mockups
• Confirm branding
• Track versions
Don’ts
• Unclear visuals
• Skip approval
• Ignore feedback
Sample Manufactured
Deadline / SLA: Within 5–7 working days
Purpose: Physical proof.
Deadline Logic: Vendor & cost capture mandatory.
Do’s
• Record vendor
• QC sample
• Capture cost
Don’ts
• Skip QC
• Hide costs
• Rush quality
Sample Approved
Deadline / SLA: Client decision within 2 days
Purpose: Specs locked.
Deadline Logic: Written proof mandatory.
Do’s

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• Written approval
• Freeze specs
• Update CRM
Don’ts
• Verbal approvals
• Change later
• Proceed without proof
Negotiation
Deadline / SLA: Within 3 working days
Purpose: Final commercial alignment.
Deadline Logic: Discount approval enforced.
Do’s
• Document negotiation
• Protect margin
• Seek approvals
Don’ts
• Casual discounts
• Skip approvals
• Delay closure
Advance Received / Confirmed
Deadline / SLA: Within 2 working days
Purpose: Financial gate.
Deadline Logic: Order blocked without this.
Do’s
• Verify payment
• Coordinate accounts
• Lock order
Don’ts
• Start without advance
• Verbal promise
• Delay confirmation

PIPELINE 3 – PRODUCTION & JOB WORK

Production Planning
Deadline / SLA: Within 1 working day
Purpose: Operational clarity.
Deadline Logic: Escalation to Ops Head.
Do’s
• Freeze BOM
• Plan buffer
• Align teams
Don’ts
• Spec changes
• Rush planning
• Ignore risks
Vendor Finalisation
Deadline / SLA: Within 2 working days
Purpose: Reliable execution.
Deadline Logic: Vendor SLA tracked.
Do’s

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• Check capacity
• Lock rates
• Clarify accountability
Don’ts
• Cheapest choice
• No agreement
• Ignore past
Production & WIP QC
Deadline / SLA: As per plan
Purpose: Early defect detection.
Deadline Logic: QC notes mandatory.
Do’s
• Mid-QC
• Document issues
• Fix early
Don’ts
• Late QC
• Ignore defects
• Rush output

PIPELINE 4 – PACKAGING, UNBOXING & DELIVERY

Packaging Planning
Deadline / SLA: Within 1 working day
Purpose: Brand presentation.
Deadline Logic: Dispatch blocked if delayed.
Do’s
• Plan branding
• Confirm quantities
• Align timelines
Don’ts
• Quality compromise
• Rush
• Ignore brand
Unboxing Experience Creation
Deadline / SLA: Within 2 working days
Purpose: Premium experience.
Deadline Logic: QC mandatory.
Do’s
• Attention to detail
• Consistency
• Inspect packaging
Don’ts
• Casual approach
• Miss details
• Rush assembly
Dispatch, Acknowledgement & Feedback
Deadline / SLA: Dispatch as committed; acknowledgement within 24 hrs
Purpose: Final closure.
Deadline Logic: Auto reminders until receipt.
Do’s

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• Share tracking
• Confirm receipt
• Collect feedback
Don’ts
• Dispatch without QC
• Ignore acknowledgement
• Skip feedback
SLA GOVERNANCE & ESCALATION
Deadlines are system-generated via Zoho Blueprints. Escalation is automatic: +1 day owner reminder, +2
days manager alert, +3 days leadership intervention. Repeated breaches affect performance and incentives

Zoho CRM Integration with Books/Inventory

To streamline the client's end-to-end process, we designed and implemented a comprehensive Production, Job Work, Packaging, and Delivery workflow in Zoho CRM using Zoho Blueprints. The solution digitized and standardized every stage of the production lifecycle, beginning with Production Planning and Vendor Finalization, followed by Production Execution and Work-in-Progress,Quality Checks, and extending through Packaging Planning, Unboxing Experience Management, Dispatch, Customer Acknowledgement, and Feedback Collection.
Each stage is governed by defined SLAs, mandatory validations, transition guidelines, automated reminders, and escalation rules to ensure timely execution and operational accountability. Additionally, we developed a **custom integration between Zoho Books and Zoho CRM** to address the client's specific business requirements beyond the standard integration capabilities. This includes **custom functions to sync products from Zoho Books to Zoho CRM based on predefined criteria**, a **custom button to push products from CRM to Books**, **custom functions to synchronize product images from Books to CRM**, and **real-time stock synchronization between CRM and Books**. These customizations ensured seamless product, inventory, and production management while overcoming the limitations of the default Zoho CRM–Books integration for the client's use case.

User & Access Management

- Add users, employees, training providers.
  Access Control
- Define roles & profiles for structured access.

- Role & Profile Management
- Assign roles with record-level security.
  Use or customize Zoho's default profiles.

Zoho Marketing Automation

The implementation included Campaign module configuration, UTM structure setup for accurate source tracking, and Google Analytics integration for detailed marketing insights.

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Additionally, hands-on training sessions were conducted to ensure the team could effectively utilize the platform for their day-to-day marketing operations.

Zoho Cliq

Implemented as the organization's centralized communication platform to enable seamless collaboration across teams. Dedicated channels were configured for different departments and projects, allowing employees to communicate, share updates, and collaborate in real time. This reduced dependency on scattered communication platforms and improved overall coordination and productivity.

Zoho Analytics

Dashboard 1 – Overall Business Performance
Comparative Analysis:
- New Leads vs Total Leads
- New Contacts vs Total Contacts
- Open Deals vs Closed Deals
- Total Products
- Campaign Performance
- Sales Pipeline Stage Summary

Dashboard 2 – Yesterday vs Today Comparison
Track Daily Change:
- Leads Added Yesterday vs Today
- Contacts Added
- Vendor Onboarding
- Products Added
- Sales Stage Movement
- Orders Confirmed

This dashboard must auto-refresh daily.

Dashboard 3 – Revenue & Profitability
- Monthly Sales
- Collection vs Pending
- Gross Margin %
- Product-wise profitability
- Campaign ROI

Zoho Mail

Deployed to establish a professional email communication system for the organization. By integrating it with the Zoho ecosystem, users were able to access and manage business communications from a single platform, enhancing collaboration and operational efficiency.

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Customer Review:

CORE INNOVATIVE DESIGNS LLP 30 Sep

★★★★★

CRM Sparrow understood our business requirements and successfully implemented Zoho One as a centralized platform for our operations. Their team streamlined our processes, automated key workflows, and improved collaboration across departments. Their professionalism, technical expertise, and commitment have made them a reliable partner in our digital transformation journey.

CRM Sparrow

CRM SPARROW
EFFORTLESS LIKE A BIRD'S FLIGHT

ZOHO Zoho Advanced Partner

Creator CREATOR CERTIFIED Low-Code Solution Provider

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