CRM SPARROW

Project – The Wedding Toli (Rayana Events Private Limited)

Introduction

The Wedding Toli, operated by Rayana Events Private Limited, is a full-service wedding planning company serving clients across Rajasthan, Delhi NCR, Mumbai, and select outstation and international destinations. The business runs on a high volume of inbound enquiries that vary widely in budget, location, and intent — from casual browsers to clients ready to book a full wedding package.

As enquiry volume grew across calls, WhatsApp, and social channels, The Wedding Toli needed a single, disciplined system to capture every lead, qualify it quickly, route it to the right team or city partner, and nurture it with a consistent cadence — without leads slipping through the cracks or sales effort being spread thin on low-intent enquiries.

Business Name

Rayana Events Private Limited (The Wedding Toli)

Company Profile

Industry: Wedding Planning & Event Management

Operating Regions: Rajasthan, Delhi NCR, Mumbai, with a partner network for outstation and international weddings

Website: https://theweddingtoli.com/

Problem Statement

1. Unstructured Lead Qualification — Enquiries arrived with no consistent way to separate genuine wedding leads from vendors, competitors, or invalid numbers, resulting in wasted sales effort.
2. No Territory-Based Routing — Leads for Rajasthan, Delhi NCR, and Mumbai weddings needed to reach the right city partner quickly, but there was no system to route them automatically by location and budget.
3. Inconsistent Follow-Up — Without defined timelines, follow-ups on new and in-progress leads were inconsistent, causing warm prospects to go cold from delayed responses.
4. No Visibility into Lead Lifecycle — There was no clear way to track a lead's journey from first enquiry through meetings, proposals, and conversion, making forecasting and prioritisation difficult.
5. Manual, Ad-Hoc Nurturing — Content like reels, testimonials, and planning tips was shared inconsistently, rather than on a structured cadence tied to each lead's stage.

Selection Criteria

- Zoho CRM
- WhatsApp integration for acknowledgments and follow-ups

- Automation and workflow rules for reminders and routing

Solution Offered

1. Structured Lead Lifecycle in Zoho CRM

- Configured a complete status framework — New, In Progress, Warm, Hot, Cold, and Fake — each with defined sub-statuses so every lead's exact stage is always visible.
- Mapped clear transition rules between statuses (e.g., In Progress → Warm on 'Sent Details', Warm → Hot on 'Meeting Scheduled') so the CRM reflects the sales team's actual process.

2. Automated Acknowledgment & Assignment

- Set up an automatic WhatsApp/email acknowledgment for every new enquiry, followed by auto-assignment to a sales executive within 24 hours.
- Triggered a Day-0 call and WhatsApp task automatically on lead creation.

3. Territory-Based Lead Routing

- Built routing logic that transfers a lead to the correct city partner once budget and location are known after the first call.

4. Time-Bound Follow-Up Automation

- Automated the follow-up cadence for unresponsive leads (Day 0, 2, 5, 10, 15, 35) so no lead is followed up on manually or forgotten.
- Applied the 'unresponsive' rule automatically once a lead crosses 40 days and 8 logged follow-ups.

5. Detailed Sub-Status & Disposition Framework

- Configured picklists and conditions for every disposition — from Fake Lead and Local Planner (budget-based) to Cold Lead and Unresponsive — each mapped to a specific next action for the team.

6. Content-Based Nurture Sequences

- Scheduled recurring nurture touchpoints (reels, testimonials, planning tips) for Warm and 'Will Connect Later' leads, and for longer-term 'Next Year' prospects.

7. Meeting-to-Conversion Pipeline

- Tracked the Hot Lead stage through Meeting Scheduled → Proposal Sent → Converted, giving leadership a clear view of deals closest to closing.

8. Lead SLA

- SLA has been configured for lead status management.

9. Reports & Dashboards

- Basic reports have been created for performance tracking, and dashboards have been configured to provide real-time insights.

10. Unique Number Generation

- Auto-generated unique numbers have been implemented for required module.

11. WhatsApp Integration

- WhatsApp integration has been completed. Automated messages have been configured based on different lead statuses, including follow-up messages.

12. Vendor Module

- A custom Vendor module has been created to maintain and manage vendor information.

13. Meta Integration

- Meta Lead Ads integration has been set up through Lead Chain.

14. Google Calendar Integration

- Google Calendar integration has been completed.

15. Google Contacts Integration

- Google Contacts integration has also been configured successfully.

Lead Nurturing Framework

The core of the implementation is the disposition framework below, configured as statuses, sub-statuses, and automated actions inside Zoho CRM:

Status	Sub-Status	Condition	Action
Incorrect Number	Incorrect Number	Incorrect, invalid or incomplete numbers	Re-contact via Instagram
Artist/Vendor	Artist/Vendor	Artists, vendors or businesses proposing to work together	Add to Vendor Sheet
Fake Lead	Hotelier	Anyone from the hotel industry	Pass on to senior stakeholder
Fake Lead	Wedding Planners	Competitor wedding planners	Discard
Fake Lead	Fake Number	Invalid or placeholder numbers	Discard
Local Planner	Low Budget	Budget up to ₹75L	Discard
Local Planner	High Budget	Above ₹75L, from a city not serviceable by the core team	Route to a partner planner from the outstation network
Cold Lead	Not Potential	Lead not worth pursuing for any reason	Discard
Cold Lead	Booked Another Planner	Client booked a competing planner	Log reason for analysis
Cold Lead	Not Interested	No wedding, accidental form fill, or casual enquiry	Nurture later with content
Cold Lead	Wedding Cancelled/Postponed	Wedding cancelled or postponed	Nurture later with content
Unresponsive	No Response	No response after 40 days and 8 follow-ups	Stop calling; send content weekly
Next Year	Follow Up – Content	Wedding is next year or client asked to reconnect later	Continue periodic content nurture
In Progress	No Response	Call not answered for up to 90 days	WhatsApp message; alternate-day follow-up
In Progress	Will Connect Later	Lead asked to be called back later	Set a reminder for the call
In Progress	Asked for Details	Requirement details shared; awaiting venue/costing response	Prioritise response with senior planner

Status	Sub-Status	Condition	Action
Warm Lead	No Response	2–3 conversations and details sent, but no further response	Follow-up message on WhatsApp
Warm Lead	Will Connect Later	Engaged lead asked to be called back	Set reminder; drop a message
Warm Lead	Sent Details	Budget confirmed, interested, ready for a call	Prioritise with senior planner
Warm Lead	Meeting Scheduled	Meeting booked with the team	Schedule and share on calendar; move to Hot
Hot Lead	Proposal Sent	Meeting held and proposal shared	Structured follow-up cadence
Hot Lead	Converted	Deal closed successfully	Move to client onboarding

Territory-Wise Routing (After First Call)

Once budget and location are confirmed on the first call, leads are automatically routed as follows:

Region / Condition	Assigned To
Low-budget wedding in Rajasthan	Core team member (Rajasthan lead)
Wedding in Delhi NCR	Delhi partner
Wedding in Mumbai	Mumbai partner
High-budget, outstation, international, or undecided	Retained by the core team

New Lead Follow-Up Cadence

For untouched or just-enquired leads, the system enforces the following outreach schedule before a lead is marked unresponsive:

Day	Action
Day 0	Call attempt 1 + WhatsApp acknowledgment
Day 2	Call attempt 2
Day 5	WhatsApp follow-up with content (reel / testimonial)
Day 10	Follow-up message with checklist or planning tip
Day 15	Final soft nudge
Day 35	No response to any attempt → moved to Cold (Unresponsive)

Status Flow Summary

- New Lead → (Call/WhatsApp sent) → In Progress
  - In Progress → No Response, followed up for 35 days → Cold (Unresponsive)
  - In Progress → Asked for Details, followed up every 5 days → Warm → Hot
  - In Progress → Will Connect Later, nudged every 5–7 days → Warm or Cold
  - In Progress → Invalid → Fake Lead
- Warm → Meeting fixed → Hot
- Hot → Booked → Client Onboarded
- Cold → No further contact unless the client re-engages
- Fake → Removed from the funnel

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As a wedding planning company managing enquiries from calls, WhatsApp, and social media across multiple locations, handling and qualifying leads efficiently was a major challenge. Unstructured follow-ups and manual processes often resulted in missed opportunities.

CRM Sparrow implemented a customized Zoho CRM solution that transformed our lead management process. With a well-defined lead lifecycle, automated acknowledgements, intelligent lead assignments, and territory-based routing, every enquiry is now directed to the right team instantly.

The automated follow-up system has eliminated manual tracking and ensured timely communication with prospects, while the meeting-to-conversion pipeline provides complete visibility into sales opportunities and forecasting.

CRM Sparrow's expertise, responsiveness, and commitment have helped us build a streamlined and efficient lead management ecosystem that continues to support our growth.





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